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Veröffentlichungsversion / Published Version
Arbeitspapier / working paper

Zur Verfügung gestellt in Kooperation mit / provided in cooperation with:
SSG Sozialwissenschaften, USB Köln

d·i·e

Deutsches Institut für Entwicklungspolitik

German Development Institute

Discussion Paper 16/2006

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Bonn 2006

Discussion Paper / Deutsches Institut für Entwicklungspolitik
ISSN 1860-0441

Brüntrup, Michael: Rethinking protection for agricultural markets in Subsaharan Africa / Michael Brüntrup. – Bonn : Dt. Inst. für Entwicklungspolitik, 2006. – (Discussion Paper / Deutsches Institut für Entwicklungspolitik ; 16/2006)
ISBN-10: 3-88985-324-2
ISBN-13: 978-3-88985-324-0
A previous version of this study has been published in: Brüntrup, Michael: Africa, regional cooperation and the world market / Michael Brüntrup, Hennig Melber and Ian Taylor. – Uppsala : Nordiska Afrikainstitutet, 2006. – (Discussion Paper 1). – ISBN: 91-7106-559-8

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Abbreviations

CET	Common External Tariff
ECOWAS	Economic Community of West African States
GATT	General Agreement on Tariffs and Trade
GDP	Gross Domestic Product
SDT	Special and Differential Treatment
SP	Special Products
SSA	Sub-Sahara Africa
SSM	Special Safeguard Measure
WAEMU	West African Economic and Monetary Union
WTO	World Trade Organization

This paper argues that although there are good reasons why poor countries in Sub-Sahara Africa (SSA) should support their agricultural sector, applicability of protective policies in the agricultural sectors of SSA is limited by various legal, economic, social, political and administrative reasons. The remaining scope, however, could be used to develop prospective agricultural sub-sectors for growth, poverty alleviation and food security, while protection should be embodied in comprehensive development strategies. These strategies must address the problems of low price transmittance of border measures and high transaction costs (in the largest sense) for agricultural products and particularly the limited supply capacity of small scale producers.

Legally, trade policy in the case study country Senegal as well as in many other SSA countries is restricted much more by regional trade agreements than by the World Trade Organization (WTO). This is a formal and political reason why the protective part of such integrated strategies must be defended and implemented at the regional level. Other reasons to plan, negotiate and implement further specific elements of these strategies at the regional level are the lock-in effect of commitments in order to protect them against *ad hoc* decisions of national politics, as well as economies of scale and scope in supportive policies, in supply and in demand. These specific elements, such as research, standard setting, quality control or strategic public-private partnerships, should be complemented with other more general elements of regional integration which are less sector-specific, e. g. infrastructure, transport, information, finance or regional trade facilitation.

In this way, regionally oriented agricultural policies can profit from wider regional integration and at the same time support it. A note of warning is finally expressed that regional solutions have high political and administrative costs and should only be stressed where advantages clearly outweigh these.

1 Arguments for Protectionist Agricultural Policies in SSA

In the last few years, there seems to have been a revival of discussion of the need for protection of agriculture in developing countries. The clearest indicator of this revival is the strong emphasis that developing countries place on less ambitious tariff reductions and special and differential treatment (SDT) concerning protection of developing economies in the agricultural negotiations of the ongoing Doha-Round of the World Trade Organisation (Keck and Low 2004). A special negotiation group (G33) has been formed around the SDT-demand for Special Products (SP) and Special Safeguard Measures (SSMs) which are long-term structural and short-term stabilising protective instruments, respectively (ICTSD 2004, 7). Other WTO negotiation groups such as the African Countries or the G90 strongly support this demand. The most influential negotiation group of developing countries, the G20, is officially also in support, but it is most probably a conflictive issue since it divides countries with predominating export interests (e. g. Brazil) and those with predominantly import interests (e. g. India).

There are at least two historical developments that explain the renewal of interest for protective policies in agriculture after the era of the 1980s and 90s, particularly in Sub-Sahara Africa (SSA).

First, there is a weakening of the so-called Washington Consensus of the World Bank and International Monetary Fund. It emphasised deregulation, liberalisation and privatisation of markets, institutions and policies, in short – "getting the prices right". It was the economic backbone of structural adjustment programmes (SAPs) in many SSA countries which enforced such policies against fresh credits. They almost always included unilateral opening up of trade barriers. Although there is little doubt that a structural adjustment process was necessary, the outcomes are not as positive as was hoped for. In many countries the economy did not recover, and even where growth rates are satisfactory the impact on poverty often remains weak. Particularly the agricultural sectors, in which most of the poor work in and live, experienced a mix of policy effects which often did not add up to a positive impact (Friis-Hansen 2000). On the positive side were currency devaluation, the liberalisation of internal trade and the dismantling of many corrupt and inefficient parastatal marketing companies. On the negative side were a reduction of Government services such as inputs, extension services, credit and infrastructure investments, which were often not replaced by the private sector. In many cases farmers were exposed to sudden competition from imports of agricultural goods through tariff reductions, abandoning of import licenses and price policies without time to adjust. Therefore, today *"there is increasing skepticism about the positive effects of a too-rapid opening up of poor countries' markets to full international competition. [It] … requires a carefully synchronized policy of raising the competitiveness of producers, improving rural infrastructure, and strengthening rural and trade-promoting institutions"* (Heidhues et al. 2004).

Second, the promised economic boost for developing countries through the outcome of the Uruguay-Round of the WTO, which for the first time explicitly included the agricultural sector, did not materialise. Industrialised countries hardly improved the market access for developing countries, using "dirty tariffication" and other manoeuvres (Tangermann 2001, FAO 2003). The experience of high volatility of international prices for agricultural goods was detrimental for many developing countries in varying contexts. The general price boost of 1995–98, provoked through the Asian boom, put a strong burden on food importing countries without the assistance promised in the Marrakech Decision of the WTO being made available. In addition, it became obvious that specially the poorest countries, most of them located in SSA, had difficulties in profiting from better market access e. g. through improved trade preferences and higher prices due to structural and supply-side problems. Later, agricultural prices plummeted in the wake of the Asian crisis and led to problems for exporting countries, which industrialised countries could afford to compensate their farmers for whereas developing country farmers came to suffer the full effect (WTO 2001; UNDP 2003, 109 ff.). In addition, price volatility on specific markets with particular importance for SSA, such as coffee, cocoa and cotton, induce additional risks for small farmers.

These experiences underline and are compounded by "old" arguments for protection of agricultural markets:

a) Protectionism and subsidies in industrialised countries will not stop, despite WTO agreements. This is due to the strong political lobby of farmers which seems to be inverse to their economic and demographic importance in a country, but also due to the importance for backward and forward linkages such as banks, input suppliers and agro-industries which are often regionally concentrated and therefore politically particularly sensitive. In addition, the non-production services of agriculture for preserv-

ing landscapes, biodiversity and cultural heritage are increasingly accepted as motives for support, particularly as modern agriculture no longer provides them as free by-products. As a consequence of these structural features, industrialised countries tend to shift support from openly trade distorting to direct income transfers. However, this will continue to create unfair competition by reducing income risks, ease investments and keep land in production. Protection will decrease, but not radically and least for sensitive products which often means for the largest markets most sensitive to competition and thus potentially the most interesting for competing developing country farmers. In addition, the accumulated capital and continuing technical progress and productivity growth in industrialised countries, fostered by an ongoing concentration of farms, will improve the competitiveness of the remaining larger farms – the present support policies shield uncompetitive farmers. And higher standards and regulations for food safety, demanded by risk-averse consumers and willingly promoted by protectionist politicians, will make it increasingly difficult for small scale farm products from developing countries to enter these markets.

b) More advanced developing countries will follow the pace of industrialised countries in supporting their agricultural sector and farmers. It is in the logic of economic development that a sector with low demand elasticity and high productivity growth will lose in relative importance, income per person and attractiveness relative to the other sectors (sunset industries). However that structural change towards industry and services takes a very long time during which the state will try to buffer social hardship as much as (politically) accepted, prominently through protection and subsidies for the relatively shrinking agricultural sector (in addition to strategic objectives such as assuring food self-reliance). Increasing wealth generated in modern sectors provides the scope to do so, because a) expenditures for agricultural products decline in relative importance for private households, thereby reducing the impact of protection on their purchasing power, and b) increasing government revenue meets a reduced number of farmers, which means that higher subsidies are feasible (Anderson / Hayami 1986; Anderson 1995).

c) Apart from the structural evolution of agriculture in a growing economy, there are factors that make agricultural markets particularly volatile: dependence on weather, plagues and other natural conditions, perishability of products, high transport and storage costs, sector wide effects of individual food scandals, diseases etc. National and international markets for agricultural products are often relatively thin compared to production volumes, provoking high price effects from relatively minor production changes. Price fluctuations on national and world agricultural markets are therefore high, provoking strong income shocks for farmers and subsequent needs and claims for support.

d) Many very poor countries exhibit a highly undiversified export economy, depending on one or a few, often agricultural commodities. Thus, their foreign exchange earnings are volatile and their entire economies prone to external shocks. If a country with such an export structure relies on imports for meeting food requirements, it experiences food risks from two sides: it is prone to shocks in export earnings (both in production and world market prices) and in import prices (Diaz-Bonilla et al. 2000). The risks for food security are particularly large when, as is generally the case in SSA, there is low

use of feedstuff in animal production and a low share of commodities in final food prices, both of which can serve as a buffer for total food consumption expenditures.

e) In a structurally changing economy with growing urbanisation and food habits, agriculture and agro-industry are also challenged to change. They have to turn from the classic provision of staples and living animals with low standards for uniform quality, sanitary and phyto-sanitary standards and regulations to new products and higher standards, often more demanding in production, processing, packaging, transportation and storage (Weatherspoon / Reardon 2003). This means that for a structurally changing food industry there is a strong case for infant industry arguments.

f) Risks in food security are socially and politically sensitive. Urban starvation has always been a dominant political issue since it directly affects key political groups of any society, such as low income civil servants, organised workers, students, etc.. Most people in SSA still live in the rural areas and will do so for a long time to come despite accelerated urbanisation, and most of these have their principle sources of income and employment in agriculture or directly related sectors and services. If historically the starvation of rural populations was not a great threat for undemocratic regimes, this changes with increasing democratisation and therefore voice for farmers. In addition, the international community is increasingly considering starvation as political failure (Drèze / Sen 1991). Even in urban areas, many people make their living from agriculture, either by producing in urban agricultural systems such as gardening or livestock or through investing in agricultural activities in the countryside (Owuor 2003). Since industrialisation in SSA is a very cumbersome process given low educational and professional levels, a lack of an entrepreneurial track-record and many structural problems, there is pressure to support and stabilise agriculture in order to support the livelihoods of the majority of people, besides facilitating the structural change in other sectors.

g) Agriculture as the largest sectoral user of important natural resources, notably natural vegetation, soil and water, determines the status of these resources to a large extent. Whereas in industrialised countries this linkage means reducing the intensity of production, in SSA it is extensity which is the largest threat since low-input agriculture mainly depends on natural soil fertility and nutrient extraction (Henao / Baanante 1999). Coupled with ever-increasing populations, this agriculture leads to land deforestation, degradation and desertification. Even high urbanisation rates will not reduce the absolute human pressure on lands (Hazell 2005). No matter whether intensification of land use happens through higher mineral fertiliser application and/or more intense use of labourintensive natural biomass management – without increased investment in land and labour productivity the extraction and exploitation of nature will continue (Ruttan 1994). Increased intensity without more remunerative and particularly stable product prices and/or fertilizer subsidies is hardly imaginable in SSA since availability of technologies alone will hardly induce farmers to use them in such risky environments (Ellis 2005).

2 Limitations to Protective Agricultural Policies in SSA – The Example of Senegal

The arguments listed in section 1 made the case for more support of agriculture in SSA, including for price support, including protection. Given unstable and continuing low world market prices for agricultural products, the high costs of direct supporting measures for poor farmers and the few financial resources available for governments, increasing trade barriers seems to be a logical demand to improve the internal terms of trade in favour of agriculture. However, as will be shown in this section, there are many political, administrative and economic costs and problems associated with protection in any single case of a major product and for agriculture as a whole, and in reality the scope for protecting agriculture in SSA is limited.

In the following, these limitations are unfolded for the case of Senegal. A case study of two important markets – rice and vegetable oils – in this country served as a first empirical basis for the arguments (Brüntrup et al. in preparation). In order to understand the context and avoid undue generalisations for a region as large as SSA, it is appropriate to look at some major features of the country.

Senegal is basically a Sahelian country with low and erratic rainfall. Therefore, in general the agricultural potential is limited. The main food crop is millet, in the south maize, manioc and rice are found in rainfed agriculture, in the north rice under irrigation. The dominant cash crop is groundnuts on which the country's economy strongly depended for several decades. In addition, cashew nuts and vegetables are increasingly being produced, and in the south some cotton. Livestock production is important, particularly in the central and northern areas. The country suffered under the drought of the 1970s which resulted in a permanent reduction of rainfall, exacerbated by overuse of natural resources due to population pressure, exploitative land use systems and deforestation (Reardon et al. 1996).

In an African context, Senegal is a relatively advanced country in several aspects: urbanisation (about 50 percent) and industrialisation (agriculture accounts for less than 20 percent of GDP) are relatively advanced, concentration takes place around the capital Dakar. Imports of agricultural products exceed exports by the factor of four, which is much more than most African countries, even if in general they have converted from net exporter to net importer in recent decades. In Senegal, imported rice has displaced millet as the most important staple. In addition, large amounts of milk products, vegetable oil, meat and other agricultural products are imported. Major exports include fish (mainly under the form of fishing licenses for the European Union), phosphate, groundnuts and groundnut oil, livestock products and some industrial goods (WTO 2003).

However, about 50 percent of the population is still rural, and about 70 percent of the work force has agriculture as its main source of income. 77–88 percent of the rural population are considered poor according to the Senegalese income standard, against 44–59 percent of the urban population. Despite growth rates of 5–6 percent since about 1994, poverty has declined by only 4 percent points (République du Sénégal 2002). This means that Senegal, even as an African leader in structural change, still shows strong dependence on agriculture. In many SSA countries growth has been spurred in sectors with little direct poverty relevance and the states are unable and/or unwilling to distribute the proceeds.

In this context the case study looked at the opportunities for and limits to implementing higher import restrictions for agricultural products which could potentially foster agricultural development and food security and alleviate rural poverty.[1] This requires products with important national markets and consumption and prospects for increasing prices and production through protection. The choice of products fell on rice and vegetable oils for several reasons: consumption is high as well as imports, they compete with local production, productive capacities are important. They are also among the products envisaged by national and regional agricultural development strategies (ECOWAS 2005). A distinction between the two products motivating their choice is the fact that the tariff rate for rice is as low as 12 percent, whereas for vegetable oils it is above 60 percent and, thus, one of the highest in Senegal. This is due to the history and political economy of the two markets which it is important to know in order to understand the respective sub-sector policies and the scope for protective policies:

— Rice production and commercialisation were almost completely liberalised under SAP until 1994 (Sène 2002; UNEP 2003; Brüntrup et al. 2005). The major commercial rice production takes place under irrigation along the Senegal river in the north, a region which received almost 60 percent of all investments in the agricultural sector in recent decades. In contrast, a large proportion of rice subsistence production is found in the south in rainfed agriculture.

— The imports of vegetable oil form part of a government controlled sector policy for groundnuts (Freud et al. 1997; Cadre Intégré 2003). A parastatal company imports crude vegetable oil at intermediate tariffs, refines and sells it on the highly protected internal market. This transformation under protection a) generates revenues which are merged with the results (often losses) from groundnut oil exports in order to stabilise and support raw groundnut prices paid by the company to farmers, and b) supports the groundnut sector as a whole which is heavily politicised and has strategic importance for the entire economy, and particularly for the central groundnut basin where most of the Senegalese small farmers live.[2] After more than a decade of strong pressure from the World Bank and the International Monetary Fund the parastatal is finally being privatised, though the conditions were not yet publicly known at the time of the field research.

Without going into more depth in the analysis of the two sub-sectors, the following results concerning the scope of protective agricultural policies can be reported.

1 These are the conditions of the July 2004 WTO-package for introducing SP. Most probably, they will require reduced and prolonged tariff reductions (Ruffer 2003; ICTSD 2004). However, the study analysed the developmental conditions of protection, not the technical issues. For Senegal in particular, the concept of SP is not relevant for the time being because of its Least Developed Countries (LDCs) country status, which Senegal obtained in 2001. LDC status means that it will not be required to reduce its WTO-bounded tariffs at all. In contrast, within a regional tariff union, WAEMU (see page 8), to which Senegal belongs and which also encompasses non-LDCs, it is not clear how the concept of SP is to be handled. Nor is clear whether a country can claim new SP when graduating out of LDC-status as will probably be the case of Senegal which is at the upper limit of LDC criteria.

2 It is worth noting that the importance of the agricultural sector is often underrated when expressed as its share of the national Gross Domestic Product, since it is the most informal of all sectors, value added in backward and forward industries is taken into account in the industrial (e. g. processing) and service (e. g. credits) sector shares, and prices paid and thus the values added in the value chains may strongly be affected by market power and political price and other policies.

2.1 Legal limitations

The freedom of Senegal to decide on trade policy issues is strongly limited. Far more restricting than international trade agreements within the World Trade Organization (see footnote 1) are the regional trade policy agreements of which Senegal is part. Since 2001, trade policy is almost entirely under the authority of the West African Economic and Monetary Union (WAEMU).[3] It has a maximum tariff of 20 percent plus some 2.7 percent for diverse administrative and regional duties. A few instruments had been designed to permit additional protection, some for the entire community, some at the national level, but most of them have expired or are close to expiring or being declared illegal under WAEMU legislation. Only one instrument, a time-constrained combination of a safeguard and an anti-dumping measure, provides scope for a further protection of 10 percent, but only as long as no definite WTO-conforming special safeguard measure is adopted. In addition, this instrument seems to be, at least in its present permanent use, against WTO law (Cadre Intégré 2003).

However, the maximum applicable tariff according to WAEMU is lower than the permitted maximum tariffs that any of the member countries had bound in the Uruguay-Round of WTO in 1994. The lowest bound tariffs have been declared by Senegal with 30 percent,[4] other WAEMU countries, bound tariffs are much higher. Thus, it is WAEMU that determines the highest possible protection, not WTO.

A relaxation of this limitation is possible but may be difficult. Paragraph XXIV of GATT restricts the tariff levels of a regional trade agreement: the fixation of protection towards third countries must not exceed the combined former level of protection of the individual countries. Since this rule applies to bound tariffs and not to lower applied tariffs, this has been less constraining in the case of WAEMU where many of its member countries have very high bound tariffs. Much more importantly, a change of the protection regime and even of a single product requires the common decision of WAEMU members. This is politically very difficult to attain, given the often conflicting interests of countries with different natural environments, economic developments and trade philosophies. Complicated procedures within the community and with trade partners and pressure from major donors add to that difficulty.

A window of political opportunity for increasing the scope for protective policies, by increasing the bound rate or by introducing special protective instruments, was the enlargement of the trade union towards the Economic Community of West African States (ECOWAS)[5]. The high bound tariffs of ECOWAS countries allowed for a common new tariff of approximately 80 % (SWAC / CILSS / ECOWAS 2005). There were some countries, notably giant Nigeria, which have traditionally employed more protectionist policies and partially defended such an interest in the new community. In addition, unlike WAEMU a common agricultural policy had already been elaborated within the ECOWAS

3 Bénin, Burkina Faso, Côte d'Ivoire, Guinée Bissau, Mali, Niger, Sénégal, Togo.

4 Additional “other duties” of 150 percent had been added to the WTO country schedule. The legal status of this right, however, is not clear.

5 In additino to WAEMU members: Cape Verde, The Gambia, Ghana, Guinea, Liberia, Nigeria, Sierra Leone.

before negotiations on the trade regime started. It states as a specific objective *to reduce dependence on imports by giving priority to food production* (ECOWAS 2005).

However, the common ECOWAS tariff framework adopted in January 2006 was that of the WAEMU. The implementation period during which the tariffs of non-WAEMU countries will be gradually adapted ends in December 2007. There is still some political impetus from farmer organisations to change the Common External Tariff (CET) for agricultural products according to Articles 3 and 9 of the agreement which allows for tariff exceptions and revisions (ROPPA 2006).

2.2 Economic limitations including distributional aspects

Classical welfare theory asserts that any protection reduces national welfare. Although the ideas on welfare economy and the underlying hypotheses may not be shared by everybody,[6] hardly anyone will contradict that above a certain level of distortion the resulting economic biases, resource allocation failures will harm an economy. Rodrik (1998) places such a threshold level at about 40 percent. In addition, high tariffs create scope for rent seeking behaviour and corruption that is certainly detrimental to market efficiency (see below).

Below the level of general welfare, the implications of protection on producers and consumers have to be looked at. Two central concerns of the impact of import restrictions on the producer side are import substitution and supply elasticities, in other words whether tariffs can indeed produce the intended shift in demand from imported to local products, how much price change is necessary to produce such a shift, and whether the price shift increases producer incomes via the price effect alone or also by increasing single product and overall agricultural output.

The case studies gave important insights into which kind of factors influence these two issues:

With regard to import substitution, imported rice is mainly broken rice, highly appreciated in Senegal where it nowadays fits the consumption habits perfectly.[7] Local rice production is either a) high quality whole rice which is preferred by and affordable for only a small better-off fraction of the population, or b) rice of heterogeneous size, difficult to cook and with lower quality attributes (colour, heterogeneity of grains, dirt) and a bad public image dating from the time of state-controlled rice production. Thus, a substitution of the im-

6 For instance, classical welfare economics neglect considerations of the impact of risk and uncertainty on investments and productive resources, assumes factor mobility that in poor countries cannot be taken for granted, ignores adjustment costs and does not provide arguments on what to do with politically biased world market prices.

7 Indeed the import of broken rice, politically fostered over many decades, has modelled the present food habits. The imports date back to French colonial times, when low quality rice was shipped from Indochina to West Africa. This mainly was aimed at facilitating farmers' specialisation in groundnut production for export to France by reducing and buffering the price of food, particularly millet and sorghum which compete with groundnuts. This substitution of rice for millet and sorghum worked well since rice (some rice varieties are endogenous to African agriculture) generally enjoys a high reputation in West Africa, and the preparation of rice is better suited for low energy cooking and urban food preparation habits than the local cereals.

ported broken rice through local products is not easy. The rural population would most probably switch (back) to millet or other local staples, whereas the urban population would probably stick to broken import rice. In the case of vegetable oil, the opposite is true: there is a preference for local groundnut oil over imported oils often from rape or soya.

Concerning supply elasticity, both sectors will have problems producing significantly higher amounts. Major bottlenecks are agricultural credit, extension of sustainable production methods, marketing and in some cases input supply. Particularly groundnut quality seeds are in short supply and difficult to produce. The interlinked groundnut price / input credit systems are in profound disorder, their rehabilitation questionable, which makes a restart almost from scratch necessary.

The marketing system for groundnuts for oil production is also still in disarray, the system is not able to correctly deal with logistics, payment for deliveries and particularly with the strong annual variations of supply, despite several reform attempts. In the case of rice, although impressive progress has been made after liberalisation in the core commercial production regions concerning productivity, major expansion of production area will be constrained by high investment costs for irrigation infrastructure: Parts of the older systems have already significantly deteriorated. The official credit systems are not operating efficiently and are therefore hardly enlargeable, microfinance systems are gaining momentum but are not (yet) able to finance a substantial boost of production.

In addition, in both sub-sectors it is doubtful whether high prices would benefit *poor* producers, the main justification of agricultural protection policies, under the present structural conditions. Among the commercial rice growers there is a strong concentration of larger farmers and an influential fraction of former government and parastatal agents who have left public functions during structural adjustment. Other rice production under rainfed agriculture in the centre and south is mainly for subsistence and would hardly be touched by higher prices unless substantial assistance is provided to produce surpluses and commercialise these.

In the case of vegetable oils, maintenance of high prices runs the risk of being absorbed by the parastatal and not being passed through to farmers. But it is not only a numerical question whether cross-subsidies to groundnut producers from protecting oil processing outweigh the institutional inefficiencies. It is also a question of whether a constructive breakup of the price and marketing regime would not give new impetus into other elements of the sub-sector, such as credit, improved seeds and other inputs and services which for the time being are strongly interwoven with trade and price policies in an economically unhealthy way. However, the risks also have to be taken into account that the whole groundnut sector would break down, with unacceptable consequences for a very large number of rural livelihoods.

Agricultural products, particularly staples, are not only important to producers but also to consumers. Agricultural protection that raises food prices especially hurts poor urban households for whom food expenditures constitute a major share of their entire consumption basket (about 70 percent), rather than richer households. Rice has a share of more than 50 percent in cereal consumption in urban households. In Senegal, not only urban but also rural poor have adopted a diet pattern in which regular rice consumption is included: rice constitutes 25 percent of cereal consumption in rural households. Thus, import restrictions have large scale negative effects on poor consumers.

Apart from this direct price impact on consumer poverty, it must also be considered that higher food prices increase the minimum wage level that households can accept, since they absorb such a large percentage of the income. With higher wages, the international competitiveness for non-agricultural, particularly labour intensive, sectors is threatened, thereby reducing the chances of industrial growth which a country without major natural resources badly needs in the long run.

2.3 Political limitations including international considerations

Closely linked to distributional economic aspects of protectionist policies are political issues. Protective policy is creating winners and losers, and accordingly these try to influence trade policy to their own advantage. In Senegal it seems that the large parastatals had a very important influence. Both the rice and the oil marketing and processing entities were able to trigger strong protection for their sectors, even to the detriment of urban consumers who are usually considered to be the decisive factor with regard to cheap food policy (Walton / Seddon 1994). Protection was abandoned or reduced along with structural adjustment when rice imports were privatised. In contrast, for some other products with a strong lobby of medium and large producers and processors such as cigarettes, sugar or vegetables, import protection continues at a high level.

In the case of rice, imports have been taken over by large private traders with a strong religious-economic-political link to the supreme political class. For the time being they have successfully lobbied for the very low protection of rice. Rice producers try to organise the increasingly powerful farmer and rural associations in order to pressure for protection. But in the meantime rice consumption has become an extremely important pillar of food security and consumption baskets (see above).

There is also an important international economic and political implication around agricultural import protection. In both cases, imports come mainly from other developing countries: rice from Thailand, India and Vietnam, vegetable oils from South America (soya) and Asia (palm oil). Though the world market prices for agricultural products in general may be under some pressure through international subsidies and protection policies, these influences are certainly not dominant for the two case study products. In the case of rice, broken rice is a by-product of the production of whole rice, its costs of production and price formation are only loosely dependent on whole rice markets. Concerning vegetable oils, there exist subsidies in the US and the EU, but the dominant consumer oil, palm oil, comes mainly from Malaysia and Indonesia and is hardly subsidised, whereas soya (oil) exports from Argentina are even taxed.

These product origins have several implications: a) cheap imports are not necessarily dependent on international agricultural policy biases, at least not on an individual product to product base; b) import restrictions will find a very inelastic supply response, the price is flexible because production costs are distributed across several linked products, allowing exporters to easily reduce their price in order to maintain sales; c) import barriers handicap South-South trade, creating political tensions and less willingness to facilitate market access for Senegalese exports (cf. UNEP 2003; Ruffer 2003).

2.4 Administrative limitations

Though administrative limitations seem to be less fundamental than the other areas discussed, they can severely impede the successful implementation of import restriction. For instance, if protection is not relieved in the case of a bad harvest or high world market prices, the effect can be the opposite to what was intended – hurting the many farm-households who are temporary purchasers of food. Therefore, an effective import policy requires a quick and predictable administration and political decision making. In Senegal as in many other SSA countries, this may not be the case:

- Governments need good information on the structure and actual trends of internal and external markets, on the distributional effects of protection and on potentials of national agriculture if they want to selectively support markets. For many markets such information is not available or inconsistent, particularly a realistic medium-term productivity estimate for national products under on-farm (not research) conditions.
- Some instruments such as flexible safeguards require quick information on material flows and/or prices. These systems are not yet working well in Senegal (and elsewhere in SSA) even for official imports, even less for national production or black markets. If customs are not able to inhibit smuggling, protection will not lead to the intended higher prices but mainly to rents, rent seeking behaviour, corruption and finally economic inefficiency. *"For some commodities, like livestock and grain, unofficial exports to neighbouring countries can exceed officially licensed trade by a factor of 30 or more"* (Little 2005).
- Even if data provision is quick and reliable and customs sufficiently effective, the same must be the case for the (political) interpretation and the decision making process with respect to flexible trade policy measures. In a highly personalised, neo-patrimonial and unreliable political system such as exists in Senegal, it is hard to see discretionary trade policies being implemented in a predictable way.

3 Conclusions on the Role of Protective Agricultural Policies in SSA

Having found many limitations that reduce the viability of protective policies in Senegal does not mean that they should be excluded as a policy option in the support of agricultural development. It cannot be a satisfying situation for very poor countries with a very shallow and vulnerable export base to rely to a large extent on imports of food which cannot be produced in the country, when at the same time more than half the population can hardly produce anything other than agricultural products for which access to the world market is limited. Indeed, several of the large agricultural products such as animals and meat, manioc and yams or peas can be considered as non-tradable at the international level due to different cultural and food habits or food safety standards in industrial countries which cannot even be satisfied by much more advanced exporting countries. In SSA as a whole, the share of traditional crops for local consumption is about 70 percent of the total agricultural output (Hazell 2005). Thus, growth in the traditional food crop sector is much more important than growth in export crops, both for overall growth and for poverty alleviation and food security (but probably this growth is also more difficult to achieve).

Even for internationally tradable products, some world markets continue to be flooded by cheap agricultural goods from industrial and more advanced developing countries through

political support and boosts of productivity. At the same time, the development of realistic merchandise exports is blocked by large and highly performing Asian exporters, particularly China that has the additional feature of an artificially depressed exchange rate which promotes exports.

Thus, without denying the importance of export-oriented growth, there remain good reasons to support production of local food crops including by using protective policies. That is also the path that many Asian developing countries have taken. Where successful, protection took place within careful overall economic policies of exchange rate, trade finance and sector selectivity (Dornbusch 1998; Timmer 2005). Thus, due consideration must be taken of the limitations discussed which partially refer to governance and structural problems that are special to SSA countries. Some of the implications are:

— Substitutionality between imported and local products must be carefully analysed. Food preferences are very subtle, and food habits change very slowly, in the direction from local to imported goods but also vice-versa. Preferences for imported goods can be difficult to change in the short term, thus the official support for such preferences (as has been the case in Senegal) is short-sighted. Better than import-substitution are forward looking strategies which anticipate changing consumer needs and develop products and supply chains accordingly. If an import substitution policy is envisaged, it is important to orient supply to consumer needs through research and extension, commercialisation, appropriate standards and quality setting and surveillance. Many of these activities contain elements of public goods – at least under the conditions of SSA – but they must be carried out in close cooperation with the private sector.

— Protection should not exceed a reasonable value. In order to limit growth reducing macroeconomic effects, protection should be limited for important staples and inputs into forward industries. From a distributional point of view, the ideal products for protection are those where many poor producers can produce for a few rich consumers who at present buy imported goods with a low price elasticity of demand. These products are typically higher value transformed products such as from intensive animal rearing or gardening. For bulk products it has to be recognised that protection is limited once a certain dependence of poor populations on imports has been attained. The protection of such markets, if at all, must come at an early stage of import dependence. High protection should be therefore exceptional and selective, for instance through the introduction of the concept of Special Products and a restrictive selection process. This selection must take possible long-term competitiveness into account as well as reasonable assumptions of paths toward such competitiveness, including necessary investments in research, extension, processing and commercialisation. A credible announcement on the long-term phase-out of protection is also essential. Stabilising protection through safeguards is even more important than permanent protection but also more difficult to implement.

— Customs services must be improved (reliable, quick, indiscriminate) to implement any effective protection policy. For safeguards this is particularly important. Customs improvements for import must meet at least partially the efforts to improve export oriented strategies.

— Problems of markets must be tackled that prevent farmers from perceiving price signals, such as high infrastructure, communication and other transaction costs as well as lack of competition at the national and local level. But also policy induced price fluctuations must be limited.

– Supply-side constraints of farmers are overwhelming in SSA, particularly if not individual products are considered but the aggregate supply of farmers who, for many reasons, generally produce multiple goods, and if sustainability of natural resource use is to be assured. To assure that protection does not only trigger increased income for farmers through price effects but that it induces intensification of production and increases aggregate supply, supply-side constraints have to be tackled simultaneously with (or even prior to) border measures. This includes improvements in technology (research, extension), taking into consideration natural resource management and long-term sustainability, and improving input, credit and probably risk markets. Where processing is an integrated part of providing substitution for imported goods, adapted storage and processing technologies must be addressed as well.

In view of the complexity and limited resources in SSA, such integrated strategies must concentrate on a few selected sub-sectors with high prospects for achieving pro-poor growth and long-term competitiveness. Competitiveness is an issue since poor countries simply cannot afford to support their largest sector for a longer period. In SSA, it cannot be expected that the private sector can develop such strategies alone: the private sector is strongly limited, many markets are not working properly, market coordination is lacking, the farm sector has few resources, and therefore a large part of success depends on the provision of public goods. Thus, the public sector has an important role to play in facilitating the private sector engagement but also in active support of some elements. A thoughtful combination of private and public partnership is needed.

4 The Potential Role of Regional Integration in Agricultural Development Strategies

As presented in section 2, in WAEMU (and soon in ECOWAS) protective policies can basically be implemented at the regional level. This means automatically a certain inertia for trade policy changes – a common decision by countries with different resource endowments, development levels, macroeconomic policies and interests can only be found by long negotiation processes including several agricultural sub-sectors and non-agricultural sectors where gains and losses can be equilibrated (Schiff / Winters 2003). Often, a certain distribution of tax revenues (particularly between coastal and landlocked countries) is necessary as well (ECA 2004). This is clearly a limitation for regional bodies in employing trade policy as an active tool for shaping agricultural development.

However, the inertia can also be valuable for trade policy in the political context of SSA. Policy decisions in individual SSA countries often exhibit more the character of *ad hoc* decisions than of being part of a strategy. Neo-patrimonial and personalised politics, coupled with a lack of strong administrations and unequal organisation and representation of interest groups, facilitates such arbitrary decisions (Bates 1998; Azam et al. 2002, compare chapter 2).[8] The history of the two analysed sub-sectors in Senegal provides several examples of arbitrary *ad hoc* trade policy and other interventions, sometimes even with good intentions but overall negative outcomes.

8 This is certainly one of the reasons why the transfer of effective policy control towards a regional body is so difficult.

Once certain policy competences on the larger regulative framework have been effectively transferred to a regional authority,[9] strategic planning means on the one hand very high coordination costs but on the other hand it can assure more discipline and thorough analysis because of peer review of proposals, as well as more commitment because of real costs to be accepted at least in the form of mutual commitments and overcoming internal political pressure. By handing over competences (and sufficient and reliable financial means which are crucial to implement strategies, ECA 2004) to regional bodies, which are partially beyond the influence of national interests such strategies can be given more perseverance and thereby provide more stable economic conditions for involved actors which is crucial for long-term strategies.

By enlarging the area considered from the national to the regional level, the potential agricultural supply elasticity to price signals can be improved and regional comparative advantages and specialisation effects can be exploited. This is particularly important for internationally non-tradables. One of the major disadvantages of SSA countries is their small size, particularly if measured in terms of purchasing power of consumers (Schiff 2002). Regional supply is also more stable compared to national since several regions with imperfect covariation of natural and other risks as well as seasonal fluctuations are integrated. Economies of scale and stabilisation are also effective on the demand side. Selective protective policies at a reasonable regional level (in West Africa that is certainly ECOWAS rather than WAEMU which has too many uncontrollable frontiers) would certainly increase the often deplored low intra-regional trade.

Internal trade creation is potentially at the detriment of external suppliers (trade diversion), but at least in the case of the emerging ECOWAS, trade creation seems to be clearly larger than trade diversion, also in comparison with other African regional agreements (Musila 2005). This is probably due to its much clearer delimitation and its moderate tariffs.

Agriculture trade in SSA is already partially regional.[10] Indeed, several of the large agricultural products, which are considered as non-tradable at the international level are tradable at the regional level. The volumes and benefits from regional trade can certainly be greatly increased and stabilised for farmers, consumers and traders, by reducing internal barriers to trade such as transport and communication costs, personal travel requirements, simplifying internal rules of origin and certification procedures, common trade laws and harmonizing product classification, and particularly red tape in the control of such regulations.

9 It is widely acknowledged that this is a crucial point: *"Existing regional integration schemes in Africa function in an 'intergovernmental' rather than 'supranational' mode, and the actual sharing of sovereignty is minimal"* (Lavergne 1997).

10 The extent of informal regional trade is not really known but is substantial. Hashim / Meagher (1999) estimate intraregional trade in ECOWAS at 20 percent of exports based on studies on Nigeria (including oil exports). Other estimates of illegal border trade in SSA are much higher (Little 2005; Meagher 1997) argues that most of that informal trade is carried out in order to exploit differences between national economic policies such as price or trade (border) policies, and that particularly members of the elite profit from their close relations to customs officers and politicians. Therefore, such informal actors will often be against regional integration which would reduce rents. This argumentation provides another rationale for a common external trade policy and a reduction of internal barriers along with a harmonisation or, better, abandoning of certain diverging economic policies. Local product trade would certainly profit from this policy.

Several of the specific supportive instruments and policies of integrated agricultural strategies (see section 3) are also, at least in principle, best provided and implemented at a regional level due to strong economies of scale and a lack of resources at the individual national level: this is the case for basic research, standards and norms, pesticide and input markets, intellectual property rights. These areas of integration go beyond a narrow concept of economic integration as trade policy only (Lavergne 1997; Schiff 2002).

It must be reiterated that external trade barriers in agriculture can only play a selective, not a substantial role in regional integration in SSA because of the limitations analysed in section 2. Other areas than trade policies must play the major role, e. g. infrastructure, transport, communication, standards, information, trade finance and financial markets, regional trade facilitation and market development. They support the trade and production volume (and therefore the profitability) of strategic regional agricultural policies advocated in this paper, but are also useful in themselves, as long as cost-benefit considerations are respected. In particular the regional food security could be improved – the present Niger food crisis proves the non-functioning of existing regional food markets (SWAC / CILSS / ECOWAS 2005). On the other hand, integrated regional agricultural strategies in SSA also seem worthwhile without supporting protective policies, although the latter would facilitate market development particularly in the early phases.

The governance problems of regional initiatives are highly visible and need particular attention, but similar problems at the national level and the leverage of regional scale economies make attempts clearly worthwhile. The active cooperation between the public and private sector is an imperative. There are many attempts at wider regional integration on such issues in WAEMU, ECOWAS and at the continental scale (Lavergne 1997, ECOWAS 2005, ECA 2004), but more can be done. This is both an issue of political will of member governments as well as of willingness and appropriate instruments of donors who often sponsor an important share of the overall investments and expenditures in these domains at the national level. It requires coordination and programme based approaches at the regional level.

The Economic Partnership Agreements (EPAs) presently negotiated between the European Union (EU) and African regions have to opposing effects with regard to regional integration. On the one hand, they weaken the possibilities of shaping an internal market through common external tariffs for products in which the EU has an export potential. On the other hand, they have the potential to push the process of regional integration through promoting non-tariff measures if appropriately negotiated (i.e. with a view for the regions interests and not the EU's ones) and if sufficiently supported by funds (from the EU but also from African member countries).

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