



ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT

Constraints to agricultural sector performance in Cameroon, Ghana & Mali

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IFAD/ France/ OECD

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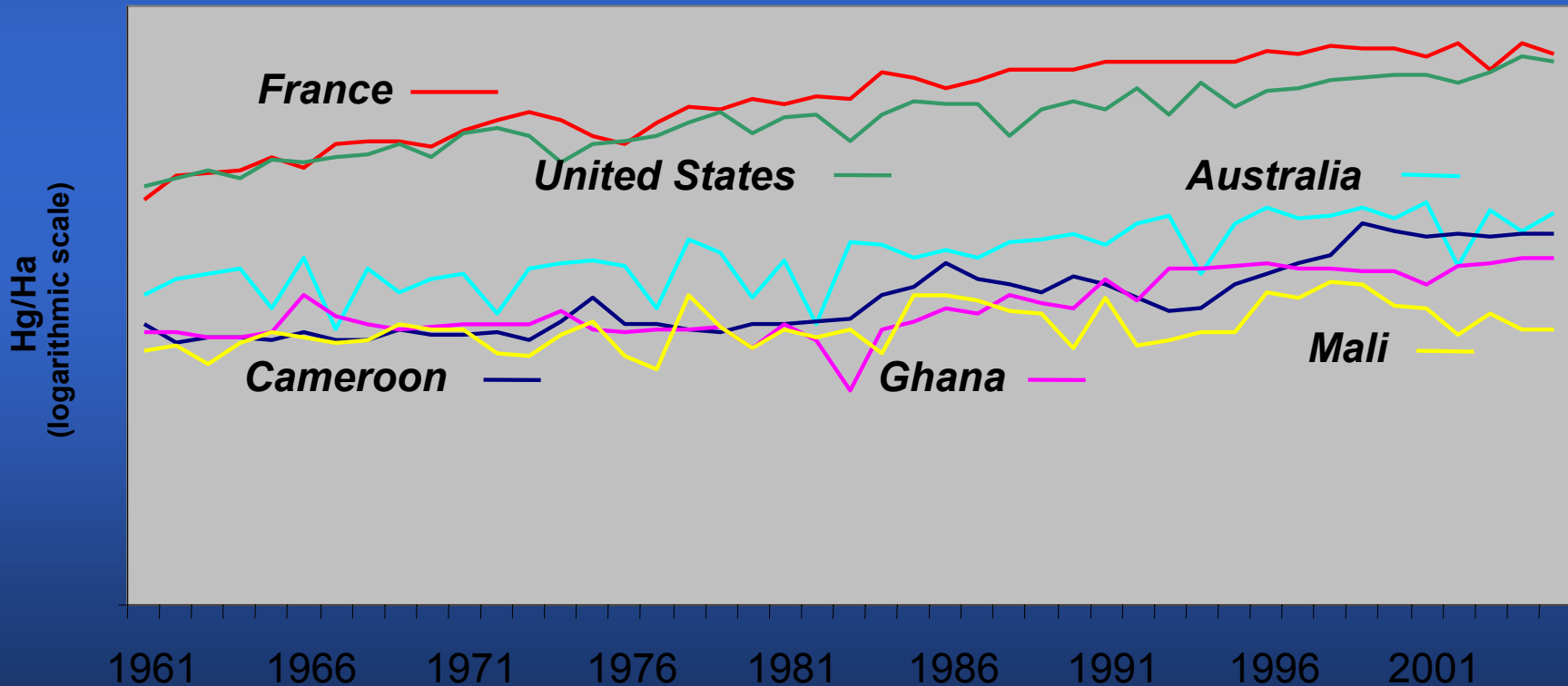
ORGANISATION FOR ECONOMIC CO-OPERATION AND DEVELOPMENT

What are the *main constraints to agricultural development* in Cameroon, Ghana and Mali?

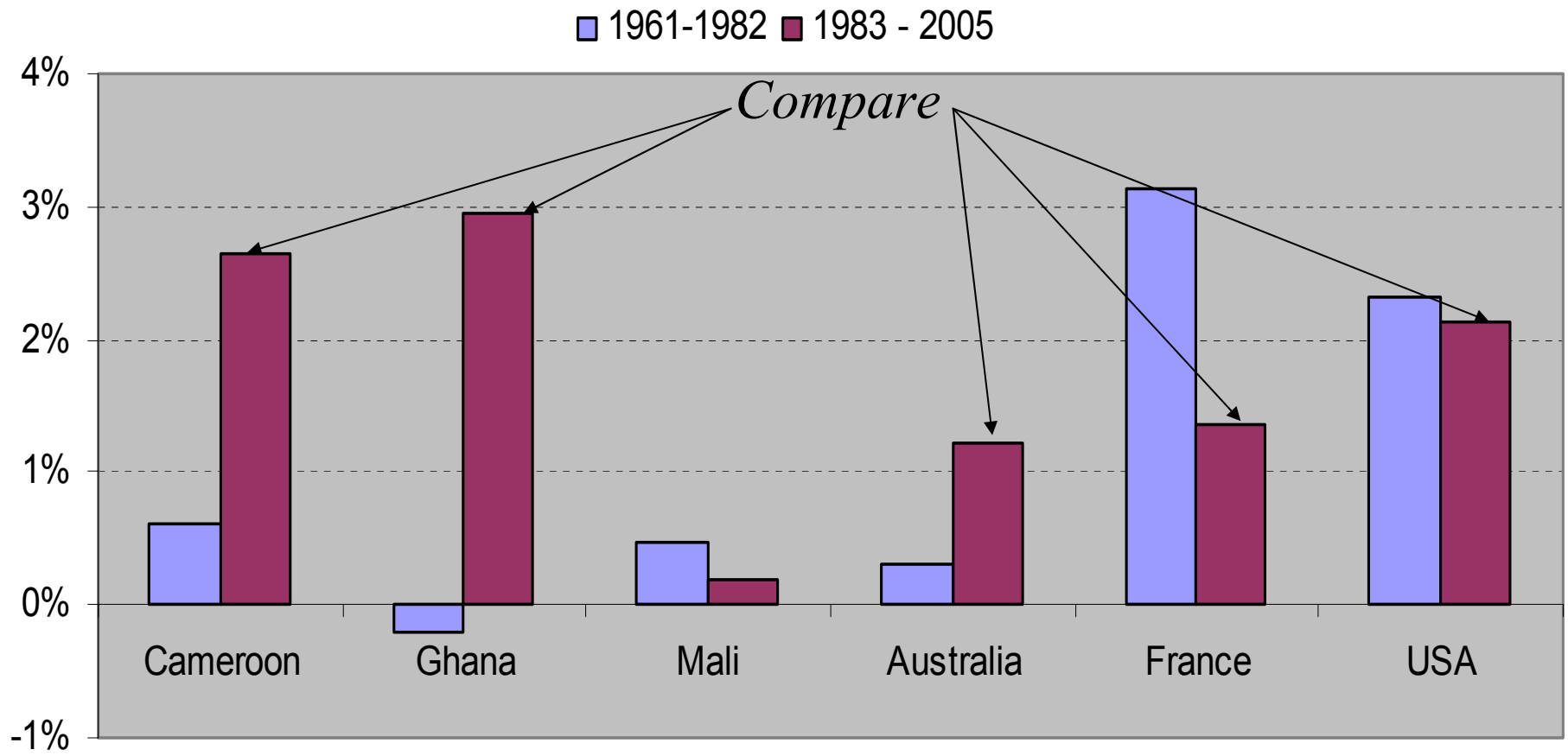
- Productivity slowdown?
- Low and declining use of modern inputs?
- High trade barriers and farm subsidies in OECD?
- Reduced and highly variable sector aid flows?

Cereal yield trends

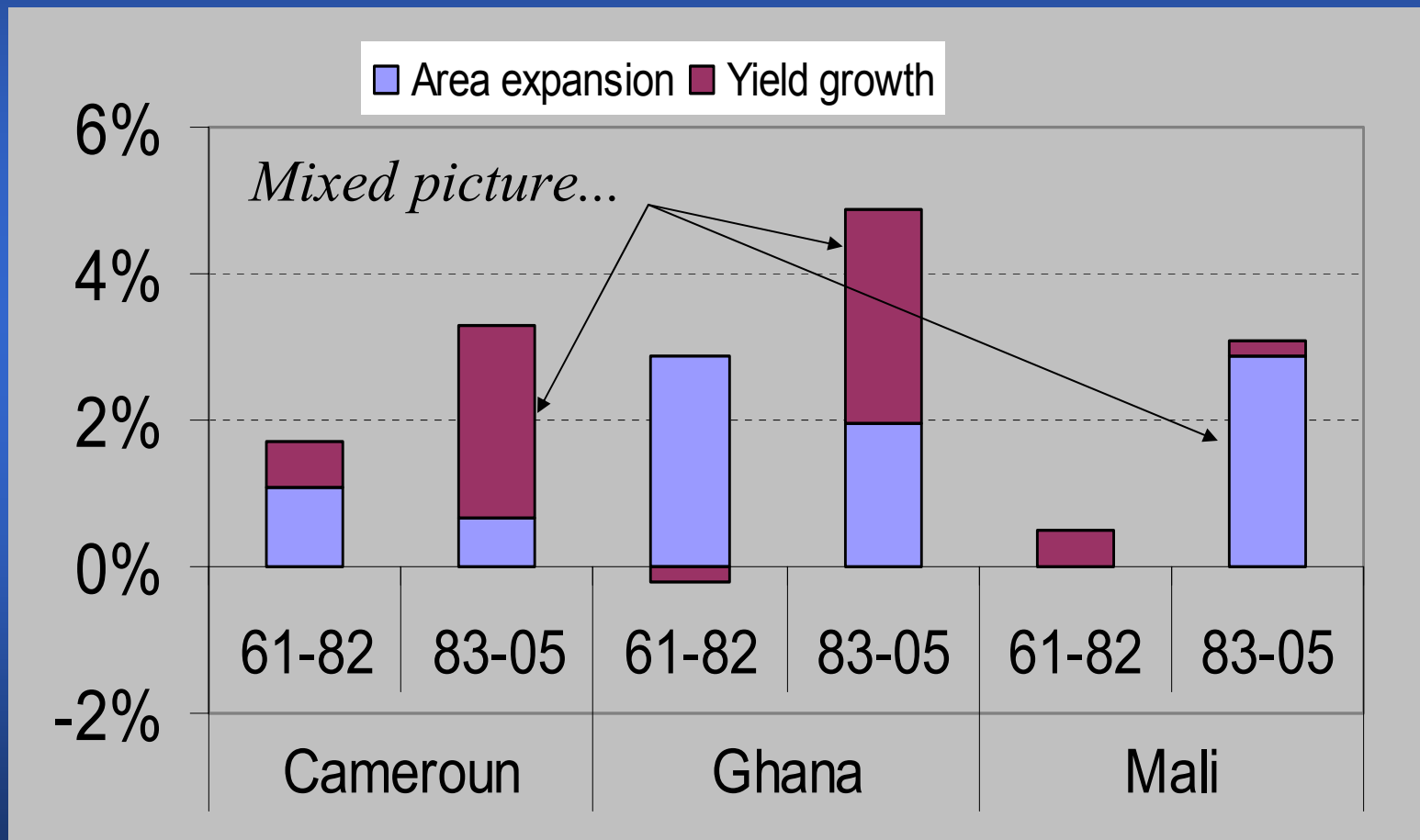
→ Higher yields in OECD countries (except Australia),
growth rates comparable (esp. in recent period)



Comparative growth in cereal yields



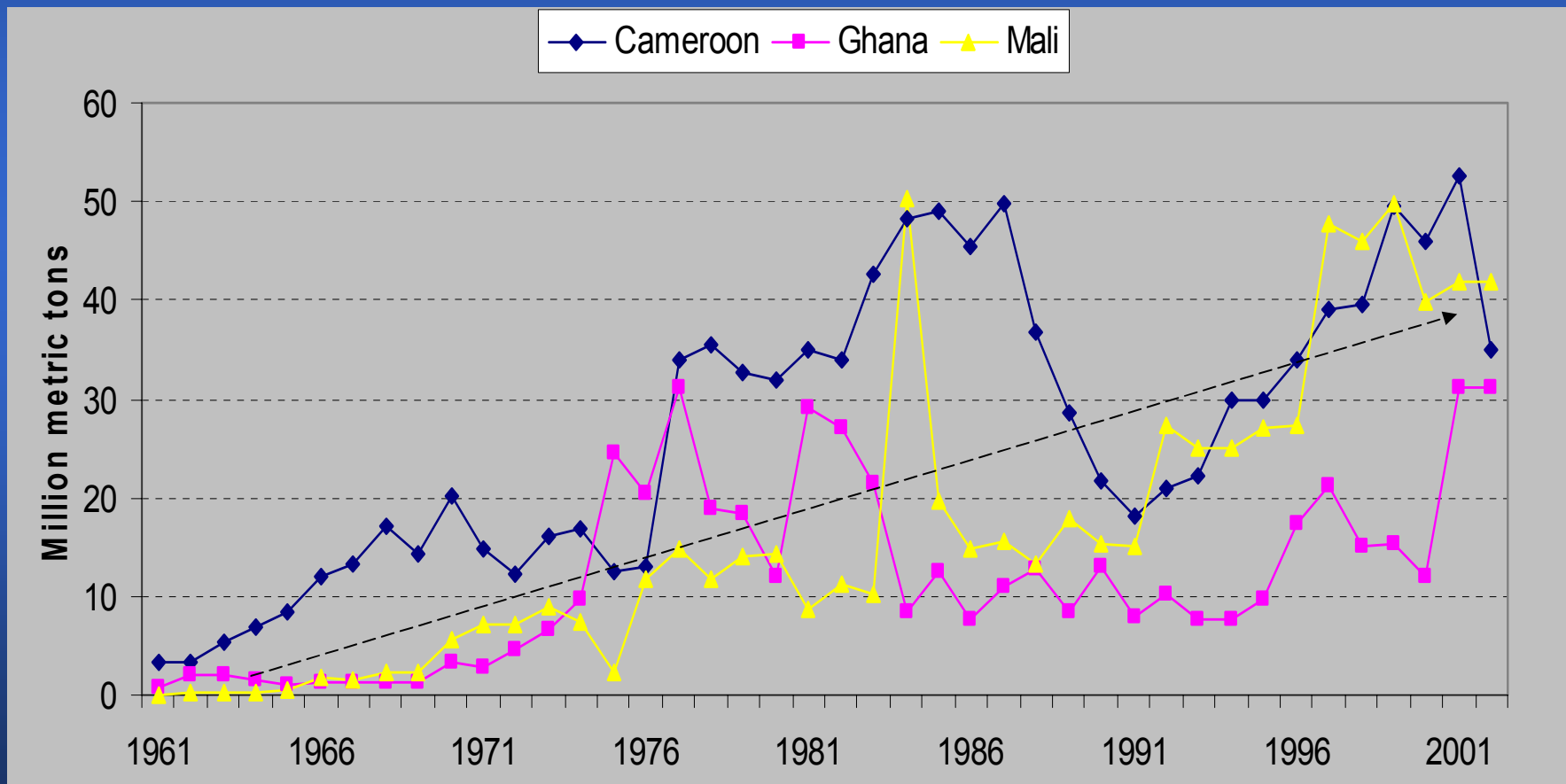
Source of growth in cereal production





Fertilizer consumption trends

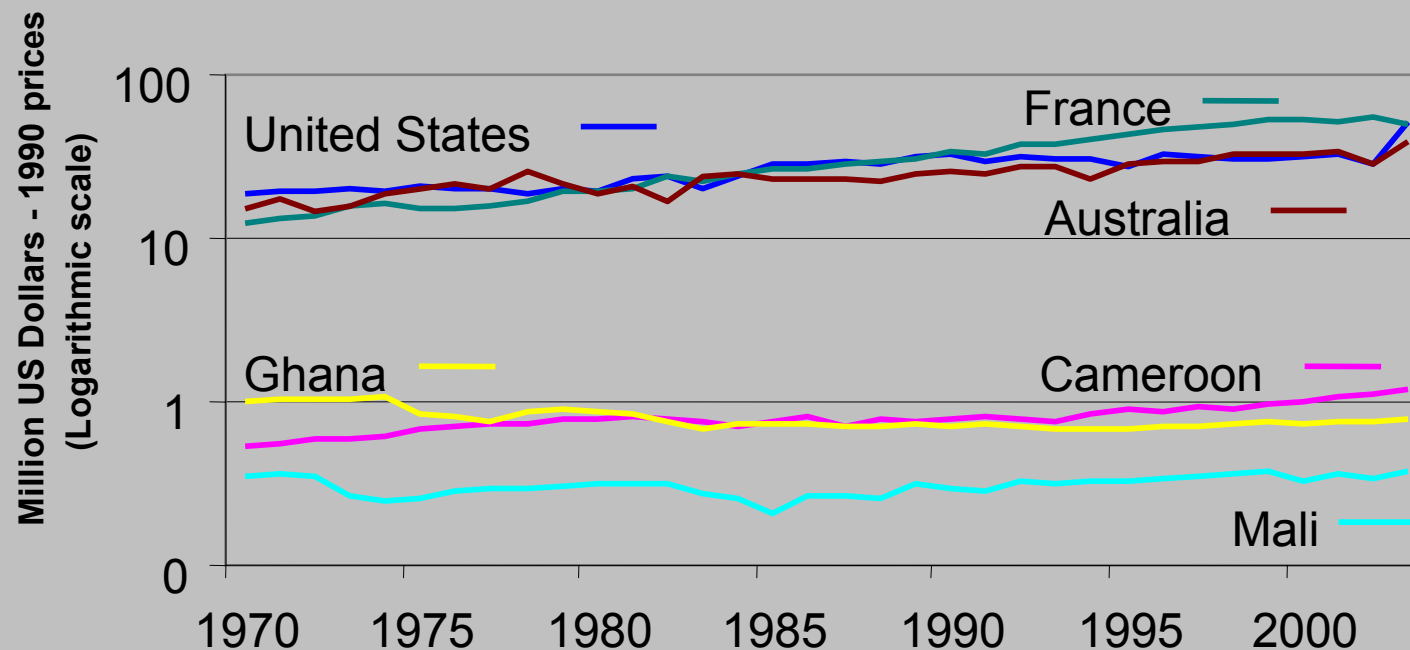
→ *Highly variable but sharply growing...*



Trends in agricultural GDP per worker

→ *Much higher level in OECD countries*

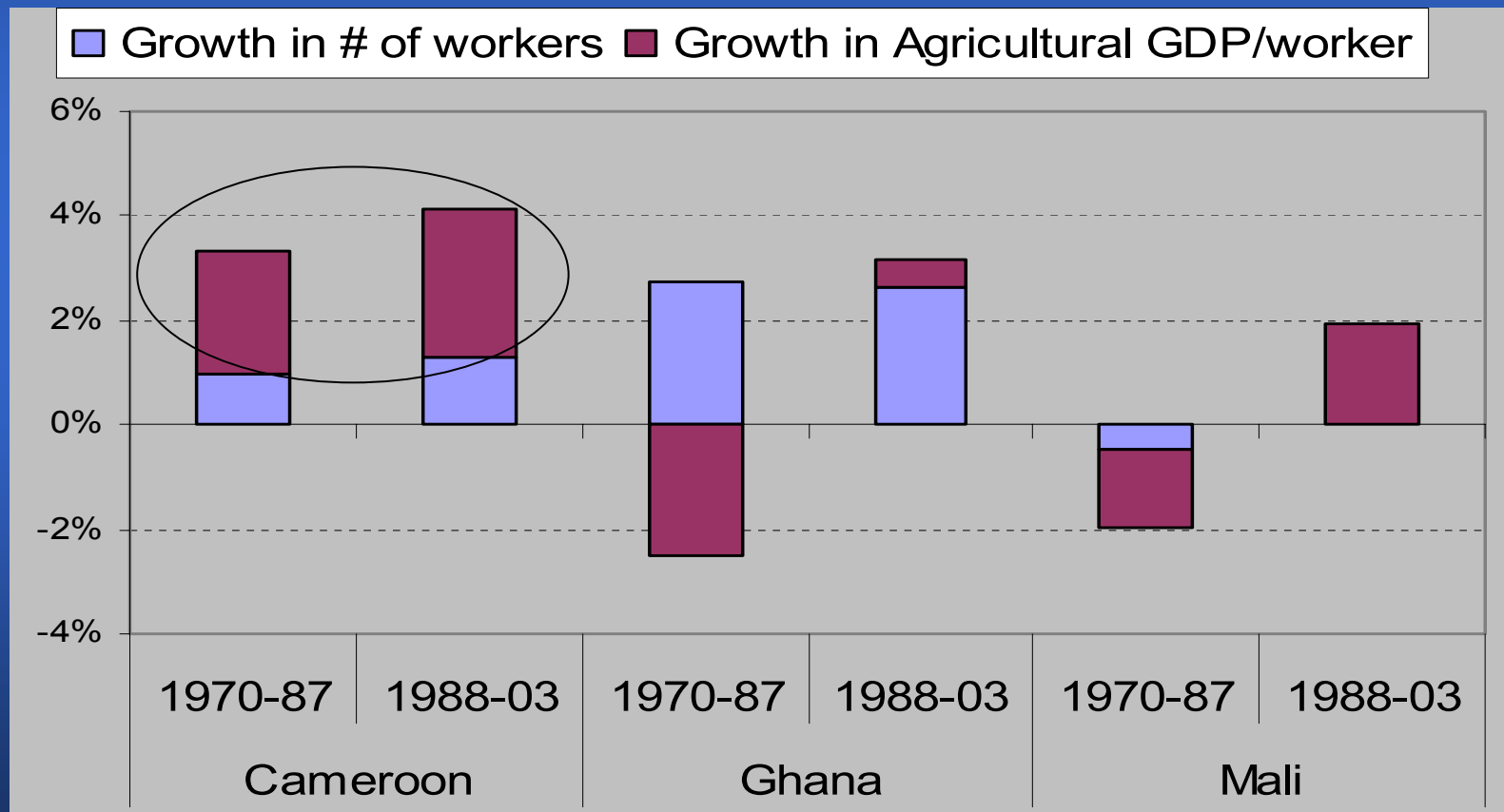
→ *Faster growth too (except for Cameroon)*





Sources of growth in agricultural GDP

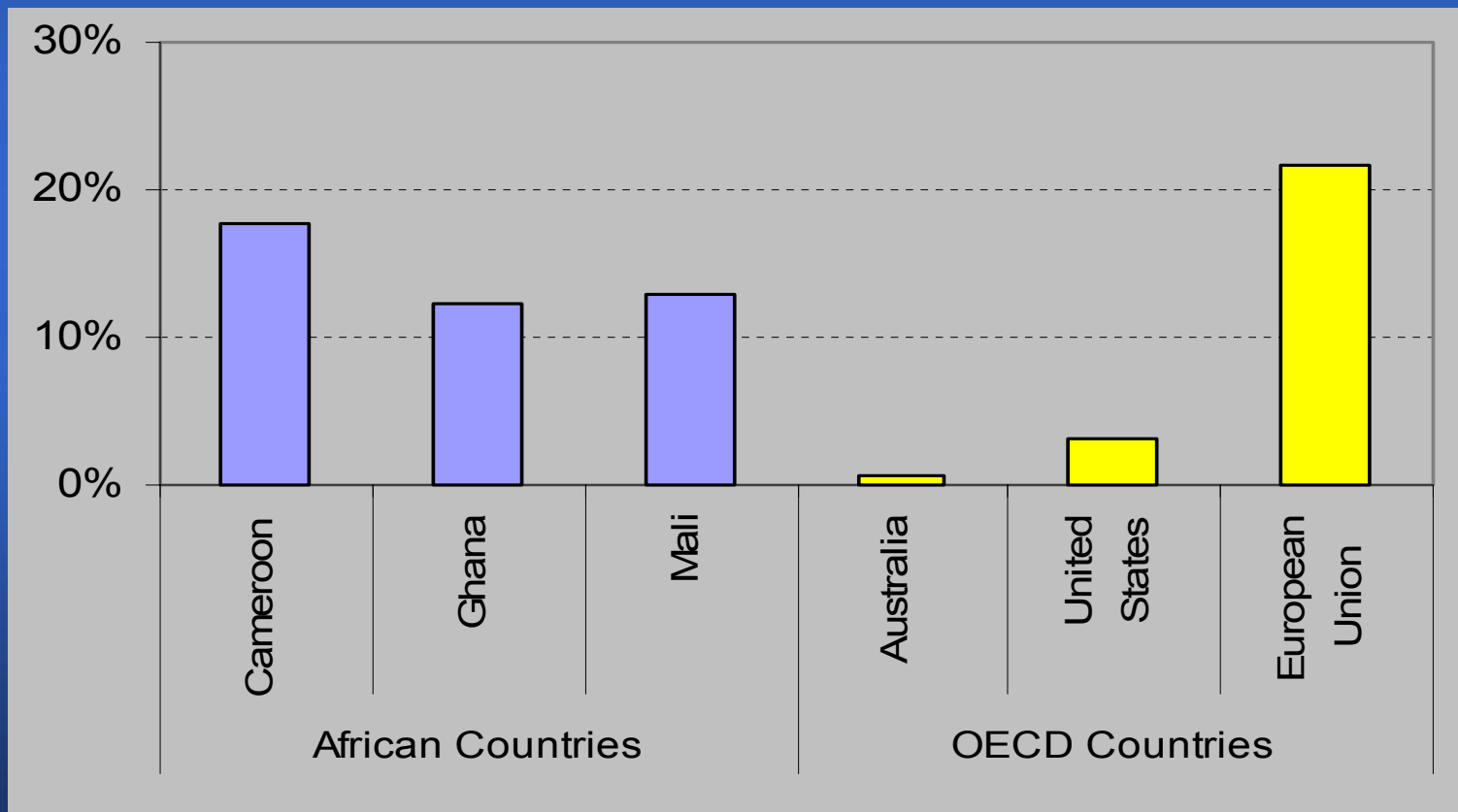
→ *Number of workers continues to grow (except Mali)*



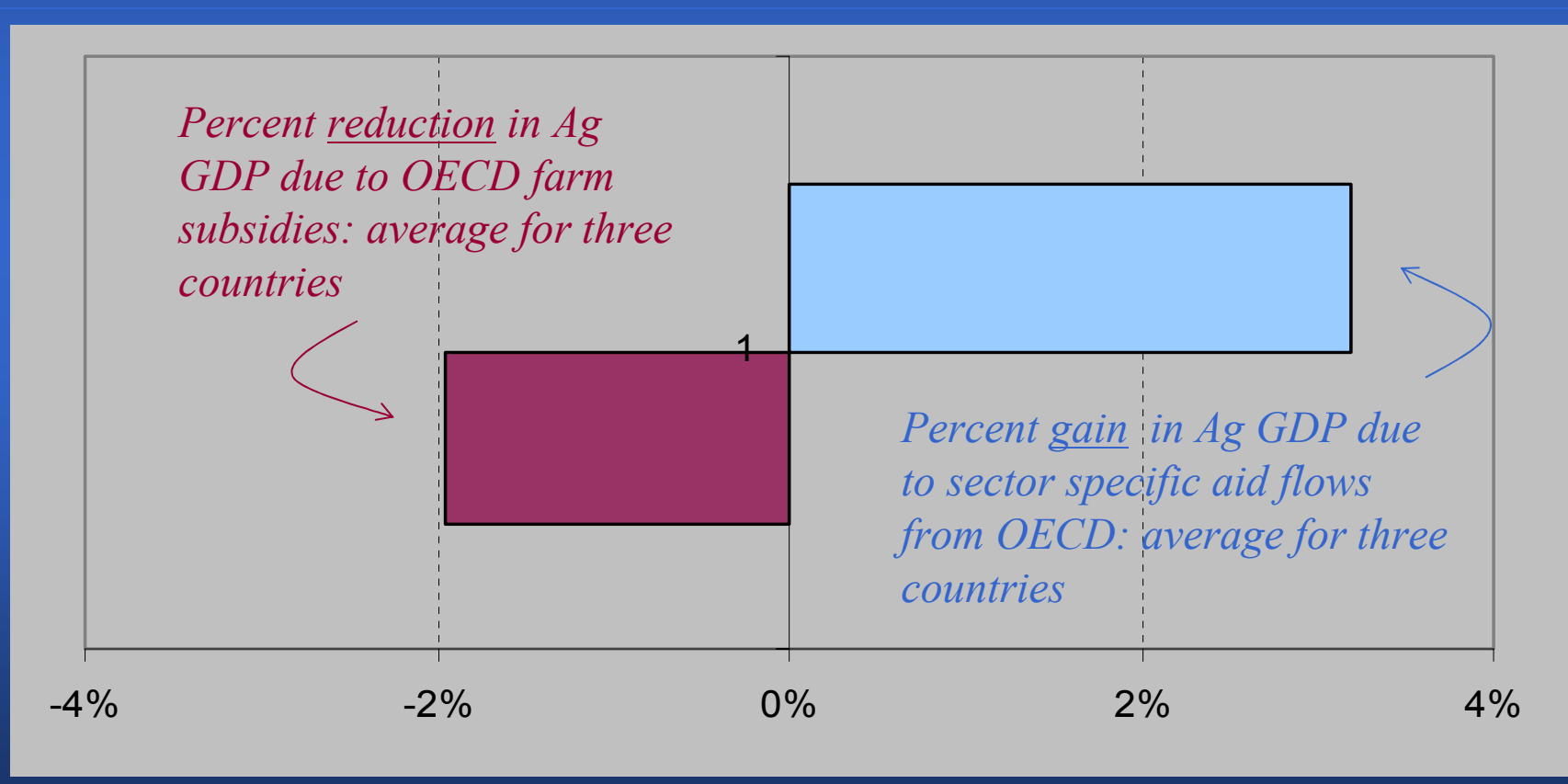


Agricultural tariff comparisons

→ *Weighted averages of tariffs levied on agricultural imports from all sources*



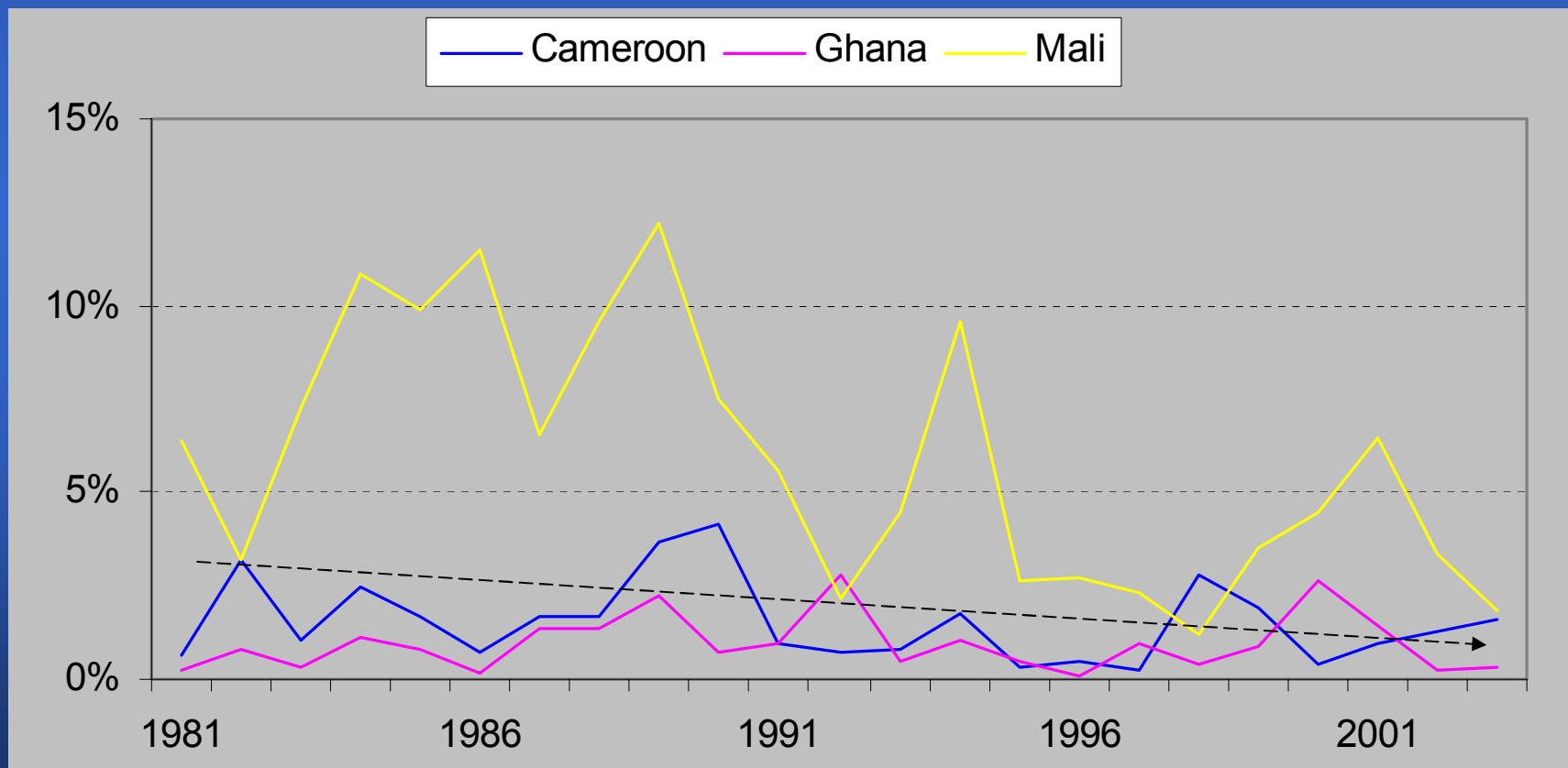
Estimated effects of OECD policies on Ag GDP in Cameroon, Ghana & Mali





Trends in sector aid flows (expressed as percent of Ag GDP)

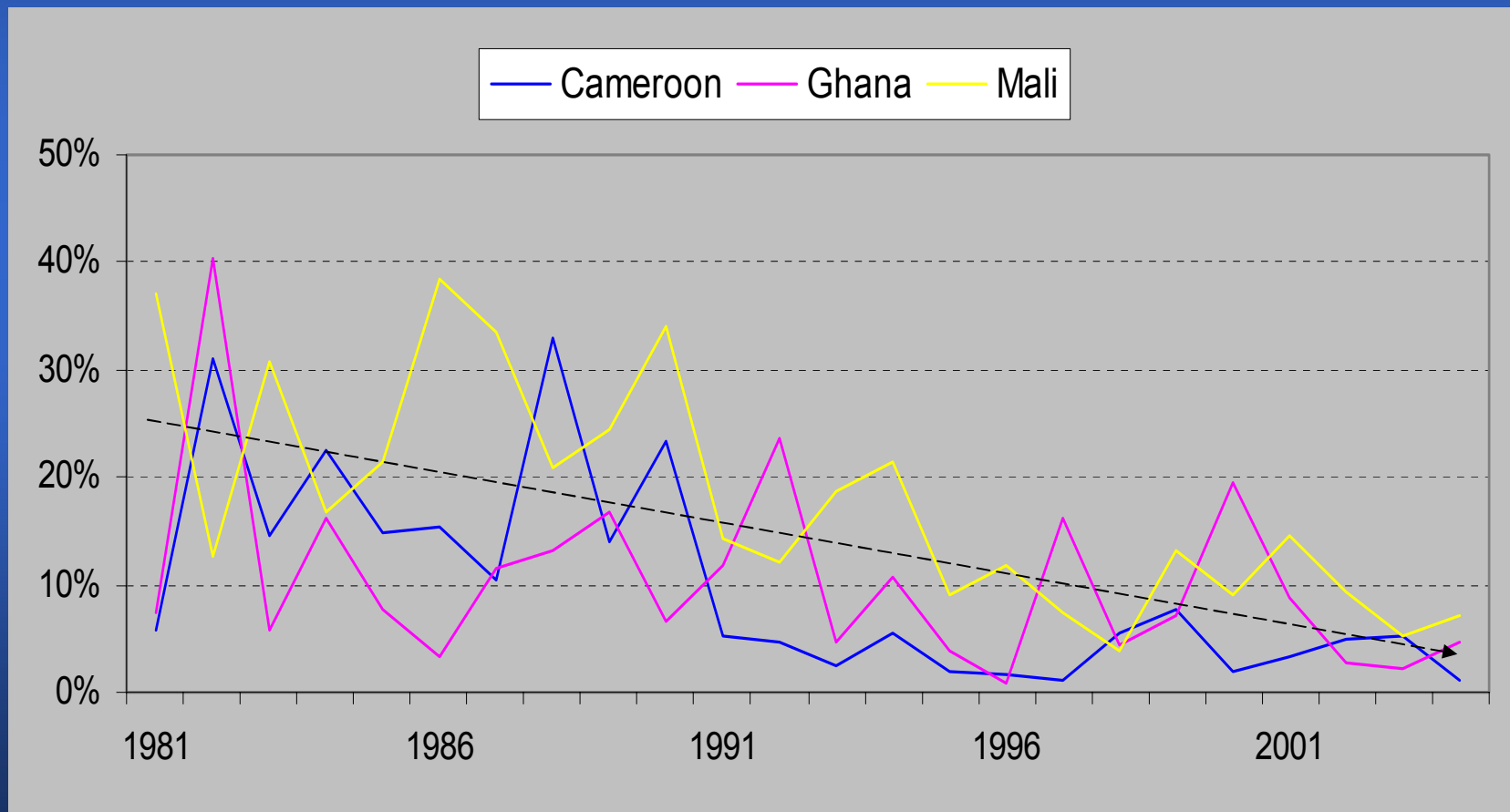
→ Generally declining, highly variable year to year (especially Mali)





Trends in sector aid flows (expressed as percent of total aid)

→ *Highly variable but sharply declining*

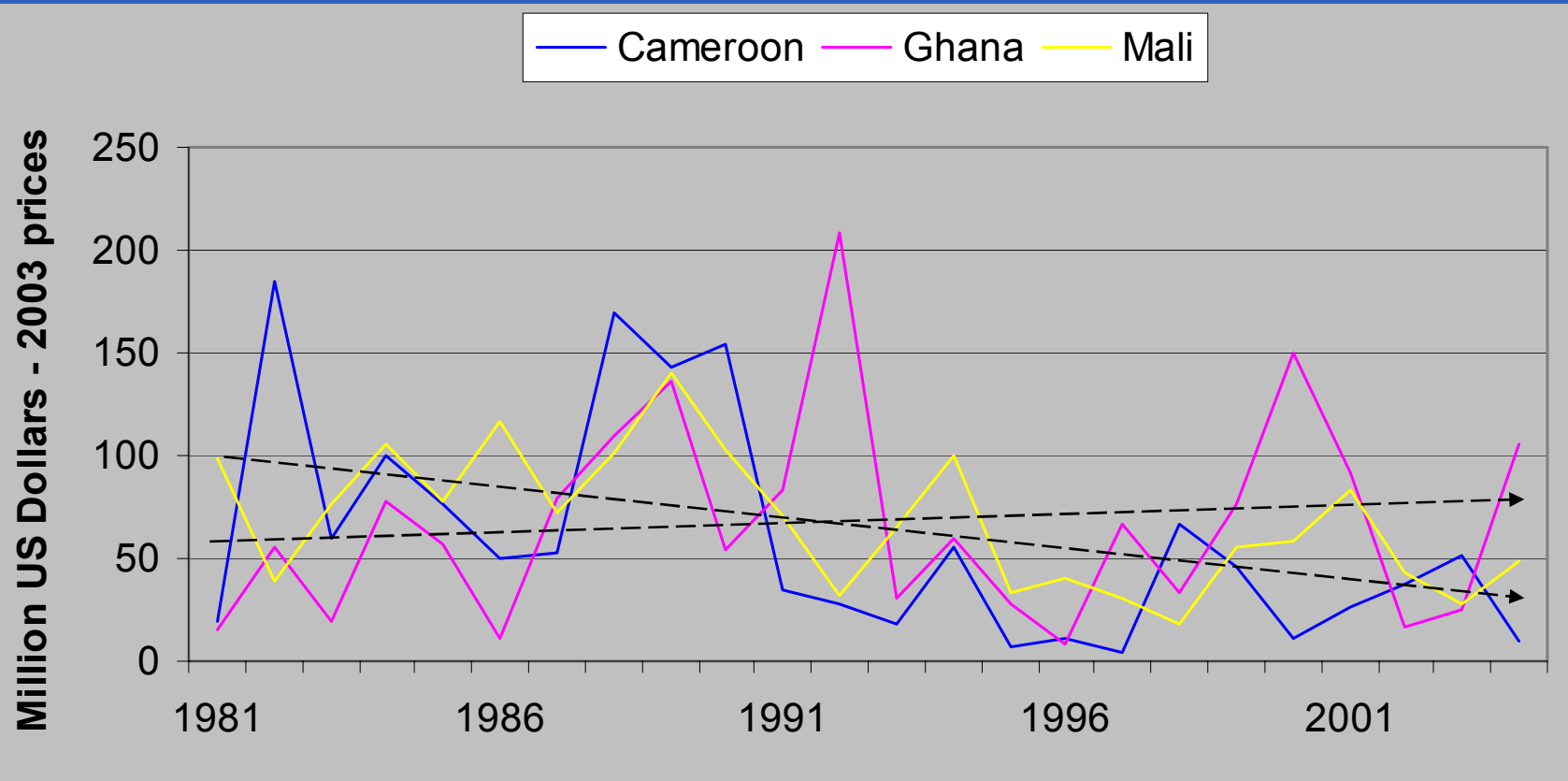




Trends in sector aid flows (in US dollars - real)

→ *Declining for Cameroon and Mali*

→ *Increasing for Ghana*





Preliminary observations (1)

Q1: Has agricultural productivity slowed? A: No

- Cereals yields have increased whether compared to past periods or to OECD countries and especially so for Cameroon and Ghana
- Cereals production has been further increased with area expansion
- Agricultural GDP and GDP/worker increased though less spectacularly (except Cameroon)
- Number of ag workers continues to grow...



Preliminary observations (2)

Q2: Has modern input use declined? A: No

- Fertilizer consumption data suggests not
- Cereal yield growth suggests not

Q3: Are OECD agricultural trade protection and high farm subsidies to blame? A: Some, not much

- OECD agricultural policies cause Ag GDP to be less than otherwise, but
- Agricultural tariffs are not high in all OECD countries and are not low in all African countries



Preliminary observations (3)

Q4: Has the evolution of OECD sector aid helped? A: No

- Aid constitutes a small and declining contribution to GDP (even assuming 100% 'transfer efficiency')
- Sector aid flows are highly variable from one year or one country to another
- Sector aid flows have decreased for Cameroon and Mali, but increased for Ghana
- Sector aid represents a highly variable and sharply declining share of total aid flows