
Chapter 4

Review and analysis of national investment strategies for agricultural policies in Central Africa: The case of Cameroon*

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*Correct citation: Achancho, V. (2013), *Review and analysis of national investment strategies and agricultural policies in central Africa: the Case of Cameroun*, In: *Rebuilding West Africa's Food Potential*, A. Elbehri (ed.), FAO/IFAD.

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1. Introduction and objectives

Agricultural policies in Central and West Africa have long focused on developing traditional export sectors as they bring in foreign exchange earnings. This has resulted in marginalizing consumer products (cereals and food products) on which small farmers depend for their survival and integration into the economy.

Starting nearly a decade ago, issues and challenges related to food security have become more critical, with rapid population growth and fewer people working in agriculture.

The new agricultural policies, inspired by the master CAADP / NEPAD program reflect the growing interest in improving the competitiveness of smallholder farms that face input supply and market access as some of their main obstacles. However, (i) an important gap that enables smallholders to participate in the development and implementation of agricultural policies still exists, (ii) the added value in the main commodity value chains is distributed unfairly at the expense of small farmers who account for a significant portion of agricultural production, (iii) and commodity sectors (cereals and food products) almost completely lack inter-branch organization.

Moreover, food crops are essential in ensuring the population's food security and improving farmers' incomes and people's living conditions (fight against poverty), especially in rural areas. These broad issues call for analyzing and understanding the situation of the main food production chains and the policies developed to improve their performance. This will help identify bottlenecks and raise government agencies' awareness on integrated support solutions to food supply chains.

This study focuses on analyzing agricultural policies in Central Africa and their impact on commodity value chains and will cover five main areas:

1. An inventory of national policies and strategies for agricultural investment implemented by countries in Central Africa (Cameroon, in particular) and other countries² (such as Gabon, the Republic of Congo and the Central African Republic);
2. Analyzing these strategies and policies' components that directly affect the development of commodity chains. The various direct and indirect initiatives, aimed at strengthening the competitiveness of different sectors, their members' (colleges, links, etc.) competencies and creating added value, will be identified and enumerated;
3. Activities aiming to organize and structure producers into viable economic entities (cooperatives, economic groups, unions, federations, etc.) and the support given to the different functions of the added value chain within sectors will be examined;
4. Policies and specific actions taken by the state to remove capitalization constraints, ensure access to means of production and product marketing at remunerative prices will be analyzed;
5. Objective indicators (including an application of the state's human capacity to carry out these programs and identify concrete gaps and deficiencies) will clarify how these so-called new policies actually take into account promoting strategic products for domestic consumption (food sectors).

Concretely, this study aims to answer the following questions:

- ✓ To what extent are national strategies likely to promote the development of sectors that support small farmers?
- ✓ How do the development and implementation of these strategies allow producer organizations set

² Most of the analysis focuses on the case of Cameroon. For other countries in the sub-region study is limited to the presentation of a summary of key information and direction.

up better structures to participate in managing selected sectors with more equitable distribution of the added value in each sector?

- ✓ Which mechanisms and tools are available to small producers and their organizations to bring about new synergies between the private and the public sectors to manage major constraints such as input supply and access to market?

This study is based on two sources of information. First, a literature review consisting in a synthesis of existing documents and analytical reports on policies' effectiveness as well as consultations with various stakeholders and organizations that have contributed to its development. Second, primary data were collected from different categories of stakeholders including farmer organization members of commodity sectors. In-depth surveys of eighty farmer organizations in several sectors have been conducted, including cooperatives / grassroots Common Interest Groups (CIGs), regional unions and federations, private sector operators, technical and financial partners, as well as public project and programs managers and ministry officials in Cameroon. One of this survey's objectives is to identify possible bottlenecks in these sectors and to identify links with policies that have been implemented.

The primary data from surveys of stakeholders have been processed, coded and entered using SPSS 12.0 software to design the input mask (input interface) from the interview guides and statistical processing of data (descriptive statistics) and Excel 2007 to process the tables for further analysis.

2. Inventory of national policies in the CEMAC area

2.1 Overview of the agricultural sector in the CEMAC zone

The CEMAC zone, which covers six countries, namely Cameroon, Congo, Gabon, Equatorial Guinea, Chad and the Central African Republic, lies between the 24th north latitude degree and the fifth south latitude degree, and between the 8th and 28th longitude degrees. It covers a total area of more than 3 million km², with 1.24 million km² for Chad alone. Thanks to its geographical location, the CEMAC zone benefits from a diversity of agro-ecological zones that can be grouped into five main types summarized in the following table:

Table 1. Agro-ecological zones in Central Africa

| Zone | Vegetation Cover/Rainfall | Production type |
|------------------------------------|---|---|
| Saharan | Desert on 2/3 of Chad Rainfall from 0 to 300 mm | Bare soil, palm oasis. Rangelands for nomadic goats and camels. |
| Sahelian | Extreme north of Cameroon, southern third of Chad Rainfall between 300 and 700mm | Dry area: herbaceous vegetation (shrubs). Oasis dates production, camels, donkeys. |
| Sudano-Sahelian to Sudanian | Northern Cameroon, CAR, and southern Chad Rainfall between 700 and 1000 mm to 1200 mm | Shrub land type vegetation. Cereal production (millet, sorghum, maize, rice), fruit and vegetable crops, cotton, and oilseeds (groundnut, sesame); livestock on natural pastures. |
| Sudano-Guinean to Guinean | Central Cameroon, west and center of the CAR, southwestern Congo, southern Gabon Rainfall 1200-1600 mm | High woodlands vegetation, sparse forests. Roots and tubers production (cassava, yam, taro, potato), cereals (maize, sorghum, rice) and cattle rearing in pastures. |
| Equatorial forest | Southern Cameroon and CAR, northern and central Congo, much of Gabon, and all of Equatorial Guinea High humidity area with annual rainfall between 1600 and 2500 mm, even 4000 mm (coastal and southwestern Cameroon) or even 12000 mm (Debunsha on the slopes of Mount Cameroon). | Roots and tubers production (cassava, yam, taro, cocoyam), fruits (avocado, mango, etc.), bananas, plantain and export crops (coffee, cocoa, palm oil, rubber, tea); also important forest resources (wood), fish and wildlife. |

After the hydrocarbon sector that has an expanding production in 5 of the 6 CEMAC member countries, agriculture is the main economic activity. Overall, more than 50 percent of the CEMAC population is dependent on agriculture. Although the situation varies widely from one country to another, the agricultural sector employs close to 65 percent of the area's working population and contributes about 25 percent of gross domestic product in the sub-region.

A. Cash crops

Coffee (Arabica and Robusta), cocoa, cotton in all its forms (fiber and unginned), rubber, sugar cane, tobacco and sweet banana are the main agricultural products that are considered as cash crops.

The cocoa and coffee sectors have a very promising outlook. In Cameroon, for example, the improvement of market prices and the implementation of programs to support production (seedling supply and treatment) have led producers to initiate planting. Local artisanal processing is also experiencing a boom especially for the production of cocoa butter and powder whose profitability is at least 3 times higher than raw beans.

The cotton sector, mostly grown in northern Cameroon and Chad, is doing relatively poorly. Given that producers receive low payments, the most important indicators are declining, including harvested area, production, the actual number of producers and yields. In Cameroon, for example, the areas used for cotton production have been reduced by 43 percent, going from 231 993 hectares in 2005 to 133 000 hectares in 2008. Over the same period, the number of producers has dropped from 300 000 to 218 000, a decrease of nearly 27 percent.

Cameroon is the largest producer of palm oil in the CEMAC sub-region with a cultivated land area estimated at 70 000 hectares in 2010. Private industrial companies handle much of the production. Palm oil (or red oil) plays an important role in food security, because it is used in a wide range of local dishes.

Global demand for crude palm oil increases annually by nearly 4 percent, and this provides a positive outlook for the sector's development, as by-products are still largely under-utilized in the sub-region. Challenges faced by farmers to develop this sector are linked to the lifting of restrictions on access to land, improving the rate of oil extraction and regenerating orchards.

Dessert banana faces difficult conditions in the global economy. The dessert banana production is more developed in Cameroon, where it contributes to nearly 30 billion XAF in export revenues.

Rubber production is being developed in Cameroon and Gabon by large agribusiness firms. The rubber sector suffers from the effects of the recent global economic crisis that resulted in a drop in vehicle sales in America and Europe, leading to the decline of orders for rubber. This sector deserves special attention given the number of jobs it generates and its contribution to the trade balance.

B. Food-producing agriculture

Food-producing agriculture continues to be the main source of food and survival for people, while generally remaining at the level of subsistence farming. The products are very varied: cereals (maize, millet and sorghum, paddy, etc.), roots and tubers (cassava, cocoyam, taro, potato, yam, etc.), oilseeds³ such as groundnut, cottonseed, etc., fruits and vegetables, including citrus, pineapple, tropical fruits, legumes and pulses, spices and condiments, leafy vegetables and mushrooms, plants and ornamental flowers, etc.

Among these products, there are some export production activities in small quantities in certain niche or specialty markets in Europe or the United States (manioc paste, pineapple, papaya, flowers, pepper, etc.).

CEMAC countries' dependency on imports varies from one country to another. In Gabon, more than 70 percent of staple foods are imported (milk and dairy products, wheat, potatoes, oils and fats, vegetables, maize, etc.) while this percentage rises to 100 for rice and 95 percent for beef, pork and poultry.

The main crops in Chad, which lies in the Sahel, are millet, sorghum and maize and are permanently exposed to climatic and production shocks: low and erratic rainfall, locusts. These factors expose

³ Except for oil palm.

populations to starvation. In addition, production capacity is hindered by current civil insecurity due to armed conflict in the country and neighboring countries, which contributes to food insecurity.

Central African Republic (CAR) has an important beef production sector. However, general food supply remains insufficient for the needs of the population. To compensate for this deficit, the country permanently imports cereals, especially rice and flour, and other products such as sugar, onions and edible oils.

Equatorial Guinea also relies on exports for the majority of its food products consumption (rice, maize, plantain, various tubers, oils, etc.).

Cameroon has relative self-sufficiency but more than 75 percent of the rice consumed is imported, despite a significant production potential. Cameroon remains CEMAC's breadbasket and the leading supplier for Gabon, CAR and Guinea in food crops (plantain, cocoyam, cassava, tomatoes and various vegetables, etc.).

Overall we note the inability of the various CEMAC countries to meet their food needs and significantly reduce their dependence on food imports. Thus, despite the potential offered by CEMAC's geographical location, food production agriculture remains somewhat undeveloped. Weaknesses stem from inefficient production systems and ineffective policies that are meant to support the development of agriculture, particularly food production agriculture on which the majority of the population depends for its survival.

The main challenge in the field of food production is to evolve to intensive rural production that will: (i) ensure food security and self-sufficiency (ii) supply the processing industry and create an internal market and consumer base for commodity sectors and finally (iii) increase exports and improve the balance of trade.

2.2 Challenges of regional integration into the CEMAC zone

CEMAC is part of a larger whole, called ECCAS (Economic Community of Central African States), which includes, in addition to the countries mentioned above, the Great Lakes countries (Democratic Republic of Congo, Rwanda and Burundi). Regional integration within the CEMAC has its origins in the colonial period when France created French Equatorial Africa to establish regional services such as the coordination of economic affairs, transport or geological and mining research services. This regional integration, launched during the post-independence years, was based on a double challenge to overcome artificial boundaries set by colonization and to build a common market through the removal of trade barriers. This process was consolidated in 1994 by the establishment of CEMAC, which is one of the most significant results of the countries' strong commitment to develop economic and customs cooperation in Central Africa.

The recent economic and financial crisis and the food crisis of 2008 did not spare the CEMAC countries. This revealed the fragility of their national policies that are meant to support and promote food agriculture. Hunger riots took place in Cameroon, the food basket of this sub-region and, once again, confirmed the prime position that food agriculture must occupy in these countries.

In general, the agricultural sector remains fragile and vulnerable to economic liberalization and globalization, which fosters more pressure from agricultural products originating from other countries in general, and from Europe in particular. In addition, with rapid population growth and mining and logging, natural resources are facing increased degradation. Moreover, fewer and fewer people are living in rural areas and choosing to migrate to the cities, which results in a decrease in the number of farmers, with competitiveness and productivity challenges and the need for intensification. The current situation exposes CEMAC countries to food insecurity and recurrent poverty phenomena.

2.3 CEMAC's Common Agricultural Policy

In the last twenty years, sub-Saharan Africa countries' agricultural policies have been subject to strong macroeconomic constraints where structural adjustment measures and the globalization process have played a key role in influencing economic policies. In this context, regional integration, through the creation and re-launching of "free trade" or economic integration areas, has increasingly emerged as a survival mechanism. Thus, CEMAC's common agricultural policy aims to coordinate and harmonize agricultural policies of its Member States. It places the issue of food security at the center of its concerns and has dedicated a specific program to this theme, the Regional Program for Food Security. Studies for the implementation of this program were due for completion in 2011 with the assistance of AfDB and FAO.

CEMAC's common agricultural policy is therefore part of a broader process of a common economic policy that is to "promote the establishment of a Community market of Member States, with the coordination of sectoral policies and harmonization of regulations to achieve gradual economic integration of the region's economies". Similarly, this strategy takes into account the NEPAD Program that reflects the continent's main thrusts requirements (Comprehensive African Agriculture Development - CAADP) and multilateral obligations (WTO and EPA). The common agricultural strategy focuses on strengthening the agricultural sector's competitiveness and productivity, comprising increased sustainable food production. Generally, this strategy gives priority to infrastructure components to facilitate trade and movement of products, people and information as well as structural ones such as access to training, new technology, support services (extension and advisory, input supply, credit - savings, veterinary services, quality control, etc.). Specifically, the CEMAC common agricultural policy responds to the following challenges:

- ***Strengthen and harmonize macroeconomic frameworks*** to promote policies that support the agricultural and rural sector. Indeed, structural reforms that were put in place to deal with the late 1980s crisis (liberalization of economic activities, stabilization of public finances, devaluing the XAF, state withdrawal from some productive sectors, privatization of public and para-public enterprises that supported rural development, etc.) impacted heavily on measures and policies, by reducing their scale.
- ***Improve producers' living conditions by increasing their income.*** This call for diversifying economic activities, developing financing tools and mechanisms suitable for agriculture, improving access to technology and strengthening the capacity of poor producers and their organizations in rural settings.
- ***Increase agricultural productivity*** to cope with rapid urbanization and create new jobs. According to FAO, in 2010 agricultural production needed to increase by 75 percent to meet global needs and reduce chronic undernutrition. Regarding the CEMAC zone, the rate will need to increase by 290 percent. Therefore, this will entail developing agricultural research, promoting the transfer and adoption of appropriate technologies and knowledge sharing between researchers, promoting the development of technologies for water management that will allow steady production while respecting the environment.
- ***Develop collection, transport, storage of crops and marketing infrastructure*** in order to improve the competitiveness of production (reduction of transport costs and post-harvest losses) on the local and international markets.
- ***Negotiate and implement regional (CEMAC) and international (WTO EPAs) trade agreements,*** beneficial to the agricultural and rural sectors. CEMAC countries will need to organize themselves to speak with one voice in negotiations and be able to get support measures and compensation benefits for the region.

- *Adopt and implement proactive national policies through increased national budgets allocated to the agricultural sector, in accordance with the Maputo Agreement of 2003 and the CAADP.* Cuts in public funding for agriculture over the past two decades have resulted in a significant decrease in agricultural performance in the CEMAC zone. However, it should be noted that the agricultural sector presents the best prospects for Africa to initiate capital accumulation, productivity gain, growth and multiplier effect throughout the economy.
- *Reforming land tenure* to allow access to land, especially in rural areas and for women and young people.

The following table summarizes current policies in some countries of CEMAC.

Table 2. Overview of agricultural policies in some countries of the CEMAC zone

| Country | Issues and Challenges / Policy Framework | Areas of intervention | Action Plan |
|---------------------------------|---|--|--|
| Chad | <p>Issues and Challenges: Sustainable development of rural production: growth of competitive value chains by developing marketing and competitiveness of agro-silvo-pastoral products.</p> <p>Strategic Framework: National strategy for rural development with the aim to increase the production of the rural economy in a sustainable way while protecting the environment and strengthening human and institutional capacities.</p> | <ol style="list-style-type: none"> 1. Create and maintain a sustainable growth in agricultural production 2. Support rural organizations 3. Develop emerging sectors 4. Improve natural resource management 5. Decentralize provision of agricultural services 6. Improve the public sector's efficiency 7. Improve access to basic services for the population and the rural economy | <ul style="list-style-type: none"> • Increased investment in hydro-agricultural and pastoral infrastructure • Expansion of access to quality agricultural inputs and equipment • Extension of access to quality support services for crop and livestock farmers • Extension of access to credit and suitable financial services • Diversification of agricultural production, • Improving the functioning of distribution channels and markets for products, • Development of emerging sectors • Crop protection |
| Central African Republic | <p>Issues and Challenges: The rural sector is the country's backbone for economic development that will strengthen poverty reduction, the fight against food insecurity and vulnerability, economic growth and national reconstruction.</p> <p>Strategic Framework: Rural sector strategy oriented toward agricultural development</p> | <ol style="list-style-type: none"> 1. Intensification and diversification of agricultural production 2. Development of professional agricultural organizations and sectors 3. Promoting coordinated development of local communities and implementation of development infrastructure 4. Implementation of institutional reforms in the agricultural and rural sector | <ul style="list-style-type: none"> • Improve the productivity of farms, through livestock, fisheries and forestry rational intensification • Improve the performance of farms through efficient production systems • Develop agricultural research • Restructure and reorganize rural stakeholders and farmer organizations • Strengthen the human, financial and material capacities of farmer organizations • Support increased stakeholders' participation to the Chamber of Agriculture • Open up rural areas • Establish the infrastructure to support production, distribution and marketing and reduce vulnerability factors linked to agricultural activities • Strengthen capacities for planning, research, advisory support, training and communication institutions |

Table 2. Overview of agricultural policies in some countries of the CEMAC zone (Cont.)

| Country | Issues and Challenges / Policy Framework | Areas of intervention | Action Plan |
|-----------------|--|--|---|
| Gabon | <p>Issues and Challenges: Enable agriculture to contribute more significantly to the improvement of living conditions in rural areas and render the country less dependent on external supply.</p> <p>Strategic Framework: National Commission for Food Security and Rural Development in Gabon</p> | <ol style="list-style-type: none"> 1. Increase local food production to ensure better availability of food at low cost 2. Improve household food security through improved protein-energy ration (2400 Kcal / capita per day) 3. Reduce rural poverty by improving stakeholders' agricultural income | <ul style="list-style-type: none"> • Improve the technical capacity of stakeholders and their organizations to participate in the management of the agricultural sector • Improve the conditions of production and marketing of different crops • Develop appropriate and consistent financing instruments that will support the development of investment in the sector • Establish a legislative and regulatory framework, and more broadly, a more attractive institutional and infrastructural environment |
| Cameroon | <p>Issues and Challenges: Strengthen the agricultural sector as the engine for the country's economic and social development; Promote professional and inter-professional organizing of the various economic operators who are to be the main actors in the development of agriculture; Improve the food security of populations by increasing production and all revenues.</p> <p>Strategic Framework: Strategy Paper on the development of the rural sector.</p> | <ol style="list-style-type: none"> 1. Develop sustainable production and supply of agricultural products 2. Sustainable natural resources management 3. Promote local and community development 4. Develop appropriate financing mechanisms 5. Develop employment and vocational training in agriculture 6. Manage risks linked to food insecurity 7. Develop the institutional framework | <ul style="list-style-type: none"> • Modernize farms (access to inputs, land, more efficient techniques and funding) • Increase farm incomes (improving productivity and competitiveness) • Enhance food security in high population density and fragile ecology areas in the context of integrated development programs • Promote rational and sustainable use of natural resources • Establish an incentive framework specifically for small and medium agricultural production and processing enterprises • Strengthen the organization and development of export-oriented production sectors and industrial processing • Develop regional and sub-regional market access • Strengthen professional and inter-professional organizations (partnership in the management sector) • Consolidate the rule of law in the commercial and financial environment (create a more favorable environment for the development of domestic and foreign investment in the agricultural sector) • Develop micro-finance systems, rehabilitate rural dirt roads and strengthen participatory management of grassroots socio-economic infrastructure |

3. Agricultural Policy implementation in Cameroon

Four major periods characterize the history of agricultural policies in Cameroon:

- ✓ The five-year development plans period (1960-1986)
- ✓ The beginning of the economic crisis period (1986 - 1990)
- ✓ The New Agricultural Policy (1990-1998)
- ✓ Agricultural Policy - New Challenges (1999)

3.1 Historical overview

A. The five-year development plans period (1960-1986)

The five-year development plans period began at the country's independence in 1960 and was characterized by the promotion of export and industrial crops as they brought in foreign currency for the state and were meant to contribute to improving living conditions in rural areas. In this system, smallholders were considered as tools to guarantee mass production in a way that was at times forced upon them. The state, for its part, guaranteed prices and strictly controlled purchase operations of inputs and sale of agricultural export commodities such as cocoa and coffee (price stabilization mechanisms).

Other instruments of this policy were the creation of large development projects and the implementation of development companies that allowed the state to be present among farmers, provide them with the required technical advice and develop the necessary infrastructure to improve their lives.

Along with traditional agricultural exports, rice and wheat were promoted by the state as a substitute for imports. However, basic food crops (cassava, taro, yam, potato, maize, sorghum, groundnuts, beans, plantain, etc.) were traditionally produced without any support except specific technical advice given within the purpose of maintaining and consolidating food self-sufficiency.

The results of this policy were generally described as mixed. Indeed, yields remained low despite efforts to promote agricultural research and technical supervision of producers (Bokagne, 2006).

The non-achievement of targets set by the state was partially due to: (i) farmers' inadequate access to inputs and other factors of production, (ii) an inefficient management system, (iii) stagnant farm productivity, (iv) aging farms and producers and (v) the backlog of agricultural research on food crops.

During the fifth plan (1981-1985), the government revised its intervention strategy by creating a development structure with a financial and administrative autonomy in each agricultural zone, with the intention of establishing a "new type" of relations between the government and farmers. Aspects related to producers' incomes (and no longer only urban consumers' interests) were taken into account when setting agricultural prices. Similarly, intensified training for rural extension workers and the management (by state services) of production and processing were promoted.

Towards the end of this period, Cameroon started oil production, which resulted in a slowdown of investment in the agricultural sector. Development priorities were given to major infrastructure projects and strengthening public and parastatal agencies. The sixth five-year plan was discontinued in 1986 due to the economic crisis.

Box 1. Management of cocoa and coffee sectors between 1960 and 1986

The development of cocoa and coffee production in Cameroon dates from the colonial period. The colonizer, considering the colony as an area of operations, develops export crops through large plantations (banana, rubber, palm oil) and small peasant farms (cocoa, coffee), for their needs.

In general, during the period mentioned above, cocoa and coffee sector management was entirely administered by the state. However, production management at the farm level was different depending on the approach of the colonial rulers:

- ✓ Western Cameroon, under British occupation, had a more liberal cooperative model, in which the state remained in the background, with actions such as “community development”. In the wake of this, multiple collection and marketing cooperatives were created and eventually gave birth to the North West Cooperative Association (NWCA) in 1953, which is still very active in the Arabica coffee sector.
- ✓ In the eastern part of the country, the French developed a model characterized by strong state intervention. Around 1937, Sociétés Indigènes de Prévoyance came about, and later became Sociétés Africaines de Prévoyance as a result of the application of the 10 September 1947 French law that redefined cooperation. Sociétés Africaines de Prévoyance were thus implemented and represented at each administrative subdivision with the primary function of collecting and selling export and consumption products. In 1958, the Union of Western Cooperatives of Arabica Coffee (UCCAO) was created out of the Sociétés Africaines de Prévoyance.

With independence in 1960, the government of Cameroon became more closely involved in managing the coffee and cocoa sectors. Thus the overall operation of the supply chain, from sourcing and “supervising”⁴ of producers to exporting was controlled by the state through various agencies such as the National Office of Commodities Marketing (ONCPB) and state corporations such as the Cocoa Development Company (SODECAO).

In this management system, producers were required to take their products to their cooperative collection center, which was part of a network of cooperatives represented at departmental or provincial level and managed at national level by the National Center of Business Cooperatives (CENADEC). In these cooperatives, directors were appointed by the state. In this system, the farmer had an executive role. Payments to farmers were made through cooperatives on the basis of prices set by the ONCPB on a scale of quality (grade 1, grade 2, non standard). Cooperative funding came from loan funds obtained from banks and guaranteed by the Central Bank (BEAC). The ONCPB entrusted transportation of purchased products to the port of Douala to private licensed carriers by purchase zone. Private carriers were remunerated for their services by the ONCPB who drew its resources from stabilization operations.

⁴ The very word “supervising” shows a hierarchical relationship, and clearly reveals where producers stood.

Box 1. Management of cocoa and coffee sectors between 1960 and 1986 (Cont.)

For this, the government freely provided support to farmers in terms of production, funding for crop treatment and marketing. Officials of the Ministry of Agriculture and development companies such as SODECAO brought the necessary technical assistance to ensure production in terms of quality and quantity. In general, at the institutional, legislative and regulatory level, cocoa and coffee supply chains were developed and organized through these steps:

- ✓ Implementation of law 73/15 of 7 December 1973 whose aim was to standardize provisions applicable to cooperatives throughout the country.
- ✓ Creating the Cooperation and Mutuality Department within the Ministry of Agriculture (MINAGRI) and assign it with the main task of monitoring and managing cooperatives;
- ✓ Creating cooperative schools for training officers responsible for boosting the cooperative movement;
- ✓ Creating the National Fund for Rural Development (FONADER) to provide credit to farmers. This structure will disappear in the 80s, with results described as "mixed".
- ✓ The establishment, by Decree No. 74/874 of 29 October 1974, of integrated projects such as Integrated Priority Action Zones in the east and central parts of the country to improve the marketing of agricultural products (coffee in particular) and boost the region's economic development;
- ✓ The establishment of the National Cocoa Development Company (SODECAO) by Decree No. 74/83 of 2 February 1974, with the main objective to promote cocoa cultivation in central and southern parts of the country.
- ✓ Creating in September 1976 the National Marketing Commodities Agency (ONCPC). This new structure supported activities of the various stabilization funds by product and the "Produce Marketing Board". ONCPB was then responsible for regulating the purchase price of commodities from farmers, ensuring compensation between the guaranteed producer prices and export sales prices, organizing and monitoring domestic and international marketing, representing producers and defending the image of the product internationally. ONCPB had a virtual monopoly on cocoa and coffee exports and provided funding for all research, extension, production, information, etc., through development companies, projects, media and cooperatives.

B. The beginning of the economic crisis period (1986-1990)

Starting in 1985, Cameroon's economy went into recession, following the sharp decline in export earnings (falling prices of major commodities namely cocoa and coffee and falling oil revenues). Between 1985 and 1995, GDP reduced drastically by 6.3 percent per year. This resulted in an imbalance of macroeconomic accounts and, more importantly, a deficit in public finances. During 1987-1988, the state's main instrument for managing export sectors, ONCPB, recorded a deficit of nearly 30 billion XAF. The assessment conducted in 1988 on two decades of state intervention highlighted the following weaknesses:

- The gap between agricultural research outcomes and farmers' concerns. Results remained inaccessible to users because there was little or no connection between research and extension services; moreover research topics were inadequate to meet farmers' real needs.
- Inefficient production management and monitoring and food products seeds distribution was due to MIDEVIV's poor performance; this public institution had the monopoly on this activity (excessively high operating costs).
- Fertilizer subsidies for small producers that represented around 60 percent of domestic consumption had excessively high costs (7.5 billion XAF per year), and were coupled with a cumbersome distribution system (delivery delays to producers); pesticides (insecticides and fungicides) for cocoa, coffee and cereals costs were on the same line (8 billion XAF per year).
- The Agricultural Credit Policy failed. The main credit instrument, FONADER, found itself deprived of financial resources due to inadequate guarantee systems and approximately 70 percent outstanding payments.
- Training and monitoring of producers through development companies were inefficient and excessively costly.
- Aging farmers, caused by rural exodus and the rapid growth of the urban population.
- The administrative management of agricultural cooperatives by state agents failed (lack of contact with people on the ground, producers did not take ownership of their tools, financial mismanagement and very strong government interventionism).

To cope with this situation, the Cameroon government decided to implement measures that reflected Structural Adjustment Programs (SAPs) agreed with the Bretton Woods Institutions. The economic policy process focused on redefining the development strategy, especially the role of the state in the economic sphere. This gave rise to a liberalized environment, characterized by non-tariff barriers being gradually reduced, restructuring or privatizing / liquidating most production and commercialization enterprises, deregulating prices, and making actors, including professional and interprofessional organizations, accountable. In this particular context, a national seminar on cooperatives was held in Yaoundé in 1988 during which the crisis of the system was acknowledged and the groundwork for cooperative reform was laid out. This brought about in the enactment of the Law on Freedom of Association in 1990. This law was then supplemented in 1992 by the law on common initiative groups and cooperatives.

Overall, state measures showed a strong political will to strengthen agriculture as the key driver of economic and social development, given its significant contribution to the economy (export crops alone account for 50 percent of foreign exchange earnings) and the need to maintain food self-sufficiency. Nevertheless, production potential remained underutilized and food crop shares on the exports market remained insignificant. It was therefore necessary for the government to move towards an agricultural policy adapted to the requirements of competitiveness and to adapt to external shocks on commodities. This is what justified the development and implementation of the New Agricultural Policy (NAP).

Box 2. Promoting diversification of farmer organizations and food crops

Starting in 1985, Cameroon's economy went into recession following the sharp decline in export earnings (falling prices of major commodities, namely cocoa and coffee and falling oil revenues). Between 1985 and 1995, GDP fell by 6.3 percent a year, which resulted in macroeconomic accounts being unbalanced and, in particular, a fiscal deficit. During the 1987-1988, ONCPB had a deficit of nearly 30 billion XAF.

To cope with this situation, the Cameroon government requested the support of Bretton Woods international financial institutions and finalized SAPs. These adjustment plans allowed a redefinition of the development strategy, particularly the role of the state in the economic sphere. This gave rise to a liberalized environment, characterized by non-tariff barriers being gradually reduced, privatizing most production and commercial enterprises and deregulating prices.

Concerning the management of commodity sectors, the SAP indicated that from 1991, "ONCPB's role will be redefined to allow the private sector to gradually take over the internal and external marketing of export crops."

Regarding other food sectors, falling prices of coffee and cocoa helped to reconsider their place in the household economy. The development of short-cycle crops (such as maize and vegetable products) gained importance. Some young high school and university graduates migrated back to certain production areas (Foumbot, Lékié, etc.).

In addition, liberalization options highlighted the place and role that farmer organizations and the private sector were to play in managing agricultural sectors. Thus, in 1988, a national seminar on cooperatives was held in Yaoundé during which the crisis of the system was acknowledged and the groundwork for cooperative reform was laid out. This brought about the enactment of the 1990 and 1992 laws on freedom of association, cooperatives and Common Initiative Groups.

C. The New Agricultural Policy (1990-1998)

The guidelines of this policy focused on implementing deregulation and privatization measures to streamline resources, finding more efficient management practices and privatizing the capital management of parastatal enterprises. The operating mode was to empower more farmers to diversify agricultural production, enhance production potential and existing market opportunities and protect domestic production. Five priorities were identified:

1. Modernize the production apparatus;
2. Food safety management;
3. Promote and diversify exports;
4. Develop agricultural products processing;
5. Balance supply chains.

For this policy, the following main results may be identified:

- ✓ Implementation of the new laws of 1992 and 93 of the associative movement which allowed the revitalization of grassroots associations in the agricultural sector
- ✓ Promoting interprofessional organizations such as Rhorticam (horticultural sectors) and the CICC

- (cocoa and coffee sectors) that have become important partners in developing these sectors
- ✓ Implementation of a new approach to agricultural extension that combines research, extension and other stakeholders from the agricultural sector
 - ✓ Various reforms in trade liberalization of agricultural products and inputs allowing for greater transparency in transactions and better income distribution to producers
 - ✓ Various projects supporting the strengthening of farmer organizations and improving food security, particularly in the most affected areas of northern regions
 - ✓ Successful restructuring of certain public enterprises, which helped initiate a recovery of investment in certain sectors (banana, cotton, rubber and oil palm)
 - ✓ Developing decentralized micro financing systems, which initiated a new approach to funding social and economic needs in rural areas.

All these measures, coupled with the devaluation of the XAF in 1994, led to the improved competitiveness of domestic products and to a significant growth recovery in certain sectors such as cotton, cocoa, banana, rubber, maize, fruits and vegetables. However, the results were below expectations for most food products because of the malfunction of internal markets, which affected domestic products' competitiveness. Other constraints identified were:

- ✓ Weak domestic and foreign private investment in the agricultural sector due to the lack of a financial market suitable for the sector, the liquidation of the Agricultural Credit Bank and the closing of its branches (and interest-subsidy funds for example).
- ✓ The lack of an institutional framework adapted to the new sector development policy context (public service reform, promoting private and associative services capable of more effectively undertaking interventions previously run by the state, weak operational capacity of producer organizations).
- ✓ The backlog in restructuring certain parastatals, which affected the mobilization of investment and growth prospects in the short term of some key production chains such as palm oil, rice and sugar.
- ✓ Small traditional farms' insufficient productivity, compounded in some areas by structural aging: no renewal of plantations, youth emigration, fertility decrease, etc.

This has highlighted farmers' precarious living conditions and the uncertainty of their farming systems, resulting in government tackling the "new challenges" that the agricultural sector should now strive to meet.

Box 3. Promotion of the cassava sector

The new Agricultural Policy provides specific guidance for the roots and tubers sector in the general framework of the starches development policy. This policy is to strengthen the position of carbohydrates in the population's diet as part of fresh and processed products in order to reduce the share of food imports and improve food security. The intervention strategy on the sector focuses on:

- ✓ Providing support for production and field quality improvement (outreach of improved planting material and crop management sequences);
- ✓ Promoting small-scale processing (food hygiene and productivity), as well as Micro, Small and Medium Enterprises (SMEs) for processing or export;
- ✓ Providing support to marketing to ensure cities have a steady food supply and stabilize prices.

In this context, government decided to set up a specific program on the sector because of its social and economic importance and the fact that the many initiatives already underway were struggling to provide meaningful results as they failed to take into account the sector's functions (Pouma cassava processing plant in the Central Region, Cassava chips production in Obala and Cassava Transformation Experimentation Centre in Yoke to the southwest). Thus the National Program for the Development of Roots and Tubers (PNDRT) was established and mobilized financing from IFAD in 2004.

Since its inception in 2005 to date, this program has brought about a significant overall increase in roots and tubers production with 214 percent for cassava (from 15 tonnes / hectare to 25 tonnes), 187 percent for yam and 325 percent for potato (PNDRT Report, 2010). However, issues related to organizing stakeholders and markets and the low level of processing still need to be addressed to enable an impact at household level through better sharing of the added value generated and reducing transaction costs.

D. Agricultural Policy and the Rural Sector Development Strategy since 1999

The new challenges are:

- ✓ Consolidating the agricultural sector as an engine of economic and social development of the country;
- ✓ Promoting professional and inter-professional organizations for the various economic operators, as they should be the main actors in agricultural development;
- ✓ Improving the population's food security through increased production and total income.

On a practical level, the strategic options are:

- Modernizing farms to improve access to inputs, land, more efficient techniques and financing;
- Increasing farm income by improving productivity and developing business opportunities to ensure that domestic agricultural products competitive to keep inflation of consumer food products prices down;
- Strengthening food security in areas of high population density and fragile ecology through integrated development programs;
- Promoting the rational and sustainable use of natural resources, while ensuring compatibility between the various social, economic, technical and environmental constraints;
- Defining and implementing an incentive framework specifically for small and medium agricultural production and processing enterprises to increase the mobilization of domestic private investment in a competitive modern production sector, that creates jobs;

- Consolidating the organization and development of production sectors focused on exports and industrial processing because of their social and economic development importance in various regions of the country, and in particular quickly completing recapitalization of agro-industrial companies under rehabilitation;
- Developing regional and sub-regional market access that presents significant prospects and opportunities for a wide range of domestic products;
- Consolidating professional and inter-professional organizations to develop new partnerships in managing the sector;
- Completing the withdrawal of public services from activities that fall within the competitive field. Adapting these activities to the agricultural policy's new objectives and to their core tasks;
- Consolidating the rule of law in commercial and financial fields, pursuing ongoing reforms, strengthening their application and providing flexible and effective management of procedures to create a more favorable environment for the development of national and foreign investment in the agricultural sector;
- Directing public investment to support existing autonomous production dynamics to increase their efficiency and their induced effects, and for structural actions such as strengthening farmer organizations, developing micro-finance systems, rehabilitating rural roads and participatory management of grassroots socio-economic infrastructure.

Surveys conducted in 2000 with farmers on developing the rural sector development strategy classified sector liberalization as the main cause of their difficulties. Adverse effects reported are:

- ✓ Lack of support for producers,
- ✓ Rising input prices,
- ✓ The fall of the purchase price paid to producers and
- ✓ Lack of funding.

In 2003, the government of Cameroon developed a rural sector development strategy document. Thus, current agricultural policies mainly aim to reach production goals as defined in this strategy document and presented in the table below:

Table 3. Agricultural Production Objectives in Cameroon in 2015

| | Production (thousands of t) | | | | Annual Growth (%) | | |
|-----------------------|-----------------------------|-----------|-----------|----------|-------------------|-----------|-----------|
| | 2001 | Est. 2005 | Est. 2010 | Et. 2015 | 2001/2005 | 2005/2010 | 2010/2015 |
| Cereals | 1 341 | 1 686 | 2 345 | 3 294 | 5.9 | 6.8 | 7.0 |
| R & T | 3 517 | 3 836 | 4 916 | 6 319 | 2.2 | 5.1 | 5.2 |
| Pulses | 263 | 300 | 402 | 538 | 3.4 | 6.0 | 6.0 |
| Oil seeds | 209 | 239 | 321 | 430 | 3.4 | 6.1 | 6.0 |
| Vegetables | 1 278 | 1 405 | 1 837 | 2 400 | 2.4 | 5.5 | 5.5 |
| Fruits | 2 019 | 2 282 | 3 067 | 4 076 | 3.1 | 6.1 | 5.9 |
| Palm oil | 140 | 177 | 248 | 350 | 6.1 | 7.0 | 7.1 |
| Cocoa | 123 | 140 | 188 | 280 | 3.3 | 6.1 | 8.3 |
| Arabica coffee | 10 | 10 | 13 | 15 | 0.0 | 5.4 | 2.9 |
| Robusta coffee | 50 | 50 | 72 | 93 | 0.0 | 7.6 | 5.3 |
| Cotton | 220 | 270 | 330 | 400 | 5.3 | 4.1 | 4.0 |

Source: SDR

The official intervention of the state is organized around seven strategic pillars:

- ✓ Sustainably develop production and supply of agricultural products;
- ✓ Sustainably manage natural resources;
- ✓ Promote local and community development;
- ✓ Develop appropriate funding mechanisms;
- ✓ Develop employment and vocational training in agriculture;
- ✓ Manage food insecurity risks;
- ✓ Develop the institutional framework.

This strategy document is currently being revised to be consistent with the Strategy Document for Growth and Jobs, which is the national framework for economic and social development. It remains the most relevant basis of analysis to assess the government's actions and how they contribute allievating the greatest constraints in the agricultural sector such as capitalization, access to means of production and marketing products at profitable prices.

3.2 Support measures for agricultural commodities in Cameroon

A. The gap between food crop production and the population growth rate

After reaching a peak of 5.9 percent in 2007, the primary sector growth rate fell to 2.7 percent in 2009. The population growth rate (3.4 percent) is higher than the food production growth rate (2.8 percent). Following the food crisis that was the cause of the February 2008 riots, the government proposed an emergency plan to boost agricultural production in consumer products: maize, rice, cassava, potato, oil palm and plantain. Accompanying measures focused on making seeds and seedlings available to farmers, supporting product marketing and warehouse and storage construction.

In 2009, the agricultural sub-sector accounted for approximately 75.6 percent of the primary sector with food crops making up 68.8 percent and export products 6.8. The food products market, however, continues to show pressure on prices. The food price index rose by 13.6 percent in 2009 as opposed to 6.3 percent in 2008. This is due to the high cost of transport (bad roads) and the demand pressure from neighboring countries (Gabon, Central African Republic, Equatorial Guinea).

Cameroon still remains dependent on maize imports with 427 288 tonnes in 2009 against 470 947 tonnes in 2007 and 429 864 tons in 2006, representing a total budget of 87 billion XAF. Cassava, plantain and maize production has increased significantly since 2005, following the implementation of specific support programs; however the quantity of main food products remained almost stagnant while the 19 million-strong current population continues to grow rapidly.⁵

⁵ The growth rate in 2010 was 2.6 percent.

Table 4. Evolution of main staple foods production (tonnes)

| Years | Dessert Banana | Plantain | Cassava | Cocoyam /Taro | Yam | Groundnut | Rice | Sorghum | Maize | Potato |
|-----------|-------------------|-----------|-----------|------------------|---------|-----------|--------|-----------|-----------|---------|
| 1991/1992 | 622.235 | 958.641 | 1.611.911 | 747.228 | 120.417 | 121.117 | 16.972 | 350.000 | 516.224 | 37.416 |
| 1992/1993 | 634.520 | 1.035.427 | 1.675.223 | 547.642 | 116.000 | 102.070 | 16.786 | 408.681 | 507.687 | 44.502 |
| 1993/1994 | 642.330 | 1.120.351 | 1.648.338 | 431.315 | 108.315 | 99.346 | 24.516 | 281.337 | 618.000 | 38.114 |
| 1994/1995 | 651.285 | 1.211.158 | 1.760.800 | 735.228 | 120.230 | 117.613 | 24.508 | 325.350 | 750.000 | 41.327 |
| 1995/1996 | 651.285 | 1.250.200 | 1.780.500 | 760.000 | 120.230 | 117.613 | 24.500 | 350.000 | 750.000 | 35.000 |
| 1996/1997 | 640.331 | 1.115.155 | 1.689.354 | 642.283 | 117.038 | | 21.456 | 343.074 | 628.382 | 39271.8 |
| 1997/1998 | 512.265 | 892.124 | 1.773.822 | 513.826 | 122.890 | | 22.643 | 240.152 | 502.706 | 49089.8 |
| 1998/1999 | 729.514 | 1.331.813 | 2.814.661 | 540.888 | 393.567 | 210.503 | 73.288 | 270.253 | 854.577 | 220.542 |
| 1999/2000 | | 1.780.783 | 1.894.132 | 1.038.673 | 261.650 | 184.361 | 67.470 | 331.574 | 584.999 | 126.090 |
| 2000/2001 | 645746 | 1.199.820 | 1.960.503 | 1.056.294 | 268.387 | 203.587 | 42.065 | 511.780 | 813.461 | 133.407 |
| 2001/2002 | 692886 | 1.237.014 | 2.003.634 | 1.079.533 | 274.292 | 210.712 | 44.546 | 541.975 | 861.456 | 136.342 |
| 2002/2003 | 743466 | 1.275.362 | 2.047.714 | 1.103.282 | 280.326 | 218.087 | 47.175 | 573.951 | 912.281 | 139.341 |
| 2003/2004 | 797739 | 1.314.898 | 2.092.763 | 1.127.555 | 286.494 | 225.720 | 49.958 | 607.814 | 966.106 | 142.407 |
| 2004/2005 | 929950 | 2.012.548 | 2.393.801 | 1.352.693 | 343.270 | 346.448 | 58.369 | 828.832 | 1.050.396 | 133.811 |
| 2005/2006 | 969967 | 2.175.434 | 2.652.176 | 1.375.386 | 366.808 | 414.046 | 64.525 | 917.107 | 1.249.489 | 142.118 |
| 2006/2007 | 1024004 | 2.338.036 | 2.767.455 | 1.428.568 | 383.212 | 449.123 | 68.267 | 976.222 | 1.322.160 | 143.568 |
| 2007/2008 | 1078041 | 2.500.639 | 2.882.734 | 1.481.750 | 399.615 | 484.199 | 72.009 | 1.006.478 | 1.394.832 | 145.018 |

Source: SDSR

In Cameroon, support policies mainly concern the measures in the WTO green box, namely:

- ✓ Subsidies for the purchase of inputs or investment for small farmers with low incomes
- ✓ Credit subsidies to agriculture (loan guarantees)
- ✓ Funding for community infrastructure (irrigation, drainage, storage)
- ✓ Extension and agricultural education funding
- ✓ Funding for research
- ✓ Funding for plant protection services
- ✓ Defining standards and regulations
- ✓ Establish food security stocks (Cereals Office, etc.)
- ✓ Address non-tariff barriers and conquer new markets

B. Dealing with non-tariff barriers

Regarding cereal imports, Cameroon is still very dependent on wheat flour that benefits from preferential tariffs and pressure from powerful flour mill lobbies. Maize imports receive the same treatment, which undoubtedly affects the competitiveness of locally produced maize. Studies have recently been conducted on the possibility of establishing a policy to incorporate potato or cassava flour (5-10 percent) in bread manufacturing. Preliminary results show that mills are opposing this and argue that (i) regular supply cannot be assured and (ii) the need to subsidize new investment in equipment that would have to be put in place.

Some vegetable crops such as tomatoes and substitute products such as soy oil versus palm oil also face competition from imports.

In general, despite the implementation of policies aimed at reducing tariffs on raw materials and inputs, certain transaction costs (transport and distribution in particular) do not allow farmers to earn sufficient income from their products.

C. A production environment still offering too few incentives

A quick analysis of the new agricultural policy's implementation in Cameroon shows that the agricultural commodities sector remains very fragile and has few incentives. The hunger riots that took place in 2008 are quite revealing of the situation. Some constraints are recurrent and include:

1. Agriculture development is based on factors of production that have low productivity (especially labor and capital). Food crop production outside of vegetable products is characterized by traditional extensive or semi-intensive systems using little or no input coupled to an aging workforce that invests little in factors of production;
2. The absence of a specialized financing structure for investment in agricultural activities (agricultural bank) and the lack of support from the state to the agricultural private sector to take over agricultural development. The private sector generally considers that agriculture can provide business opportunities. However, interested developers are faced with no existing credible expertise structure, capable of advising and assisting them in developing their projects and implementing their business plans (technical consulting, land tenure security, fundraising and risk management, etc.). Under the new organizational structure of the Ministry of Agriculture and Rural Development in place since 2005, two sub-directorates have been created, one in charge of small and medium-sized farms and the other to promote private enterprises. The conventional and administrative operation of these structures, coupled with the lack of financial resources and specialized and qualified staff, precludes them from providing the advice and support needed by the private sector. Moreover, capital is a major constraint for the development of agricultural production. Weakly capitalized small farms provide most of the food production (about 90 percent). Credit access conditions for these producers are almost impossible to meet. Microfinance institutions, which are at times presented as the solution to local credit, impose conditions beyond the reach of small producers.
3. The almost total absence of infrastructure for transport, storage, processing and marketing has resulted in an imbalance in distribution of the added value generated at the expense of producers.
4. Development of producer organizations poorly integrated into value chains despite the state's willingness to promote relations of a "new type" between the government and the peasants by "empowering" farmers through strengthening the cooperative movement.
5. The existence of a multitude of projects and programs whose activities are at times poorly coordinated. Beyond references made in public policy documents (the Growth and Employment Strategy Paper and the Rural Sector Development Strategy Paper) there is little steering of development partners for concerted action. Interventions are dispersed (sprinkling), and duplicated as a result of insufficient consultation between administrations involved in implementing programs and projects, the inability of policymakers to contain political pressures (territorial coverage management) and the willingness of development partners to project their own image. Thus, in most cases, the measures put in place regarding subsidy strategies for certain inputs (fertilizer, seed, pesticides) do not comprise a sustainable development dimension. This raises the problem of monitoring development outcomes of interventions and their sustainability (ownership by the beneficiaries).

6. The lack of a comprehensive framework to manage all operations in order to capitalize on achievements and to report on the sector's progress. Work is underway to establish a sectoral program⁶ that aims to be the sectorial strategy's framework for programming and monitoring and evaluation.

Table 5. MINADER Programs and projects involved in supporting food chains

| Project / program name | Focus of intervention | Areas of intervention | Other observations |
|---|---|--|---|
| <p>1. National Agricultural Extension and Agricultural Research Program (PNVRA).</p> <p>Target / beneficiaries:</p> <ul style="list-style-type: none"> • Grassroots Producer Organizations • Socio-professional Associations of Producers | <ul style="list-style-type: none"> • Improved technical assistance scheme to producers • Developing farms' potential and production • Conservation management of natural resources and protection of the environment | Country wide | Initially funded by the World Bank and IFAD, the program is currently funded from internal resources (BIP HIPC) |
| <p>2. Competitiveness of Agricultural Operations Improvement Program (ACEFA).</p> <p>Target / beneficiaries:</p> <p>The EFA members of producer groups, producer groups and professional agricultural organizations of the second and third levels (CIG unions, Cooperatives and Cooperative Unions)</p> | <ul style="list-style-type: none"> • Capacity building of secondary and tertiary level professional organizations to improve the services provided to EFA • Financing of producers' productive projects and their organizations to increase the capacity of family farms • Establishing an advisory support mechanism co-managed by the state and the profession | Northern, Adamawa, South, Southwest and West Regions | Ongoing program financed by AFD / C2D resources |
| <p>3. Grassfield Participatory and Decentralized Development Project (GP-DERUDEP).</p> <p>Target / beneficiaries:</p> <p>Smallholders</p> | <ul style="list-style-type: none"> • Agricultural Development • Capacity building for decentralized MINADER services, municipalities and agricultural socio-professional organizations in community development • Support for the rehabilitation of rural roads | North-West Region | Ongoing project funded by the AfDB |
| <p>4. Rural Development Project in the Region of Mount Mbappit.</p> <p>Target / beneficiaries:</p> <p>Rural people / farmers</p> | <ul style="list-style-type: none"> • Agricultural and rural infrastructure • Animation / Awareness, training and support to beneficiaries of agricultural extension • Acquisition of agricultural inputs and equipment; • Management and monitoring / evaluation of the project | Department of Noun, Western Region | Financed by the Islamic Development Bank |
| <p>5. Rumpi Area Participatory Development Project.</p> <p>Target / beneficiaries:</p> <p>Rural populations in the South West</p> | <ul style="list-style-type: none"> • Capacity building of stakeholders • Improved agricultural production and productivity • Improved market access and support to local development initiatives. | South West regions | Project funded by the AfDB |

⁶ Livestock Agriculture Sectoral Program (LASP).

Table 5. MINADER Programs and projects involved in supporting food chains (Cont.)

| Project / program name | Focus of intervention | Areas of intervention | Other observations |
|---|--|--|---|
| <p>6. Plantain Sector Re-launch Program (CSR)</p> <p>Target / beneficiaries:</p> <ul style="list-style-type: none"> Individual or organized (CIG) producers of plantains Individual or organized (CIG) nurseries specializing in of plantain plant production Small-scale plantain processors Small plantain traders | <ul style="list-style-type: none"> Cover the plantain shortfall at national and sub-regional level Establish a network of professional nurseries Support for farmers interested in establishing a plantation of 0.5 to 1 ha. | Adamawa and 7 southern regions of Cameroon | Ongoing HIPC funding |
| <p>7. National Program for Food Security (NPF)</p> <p>Target / beneficiaries:</p> <ul style="list-style-type: none"> Small farmers and their organizations Local decentralized authorities NGO partners | <ul style="list-style-type: none"> Optimum use of natural resource base Crop Intensification Diversification of production systems Processing and marketing of products Nutrition Monitoring, warning and crisis response mechanism | Countrywide | Initial funding FAO and BIP MINADER |
| <p>8. Grassroots Poverty Reduction Sub-Program (SPRP)</p> <p>Target / beneficiaries:</p> <ul style="list-style-type: none"> Small farmers and their organizations | <ul style="list-style-type: none"> Training in the development of projects Financial support for the implementation of beneficiaries' eligible micro-projects Training of producer organizations in project management | Countrywide | UNDP |
| <p>9. Maize Sector National Support Program (PNAFM)</p> <p>Target / beneficiaries:</p> <ul style="list-style-type: none"> Small maize producers and their organizations Multipliers of improved maize seed varieties Medium and large maize farms but only in terms of equipment (support for mechanization) | <ul style="list-style-type: none"> Training of multipliers of improved maize seed varieties Support producers' micro projects Strengthening producers' capacity Structuring and organizing value chain stakeholders (researchers, seed multipliers, seed conditioners maize producers, input suppliers, traders, transport operators, etc.) | Countrywide | Ongoing HIPC funding |
| <p>10. Roots and Tubers Development Program</p> <p>Target / beneficiaries:</p> <ul style="list-style-type: none"> Farmers Farmer organizations | <ul style="list-style-type: none"> Strengthening the capacity of roots and tubers producers Improved access for producer organizations to local, sub-regional and national marketing circuits for roots and tubers Sustainable improvement of processors' access to appropriate post-harvest and processing technology Contribution to the sustainable intensification of roots and tubers production through the use of improved technologies | Far North, Adamawa, and 7 southern regions | Ongoing project financed by IFAD |

Table 5. MINADER Programs and projects involved in supporting food chains (Cont.)

| Project / program name | Focus of intervention | Areas of intervention | Other observations |
|---|--|--|---|
| 11. Relaunching rice production in the Logone Valley. | <ul style="list-style-type: none"> Structuring rice producers Establish a fertilizer revolving fund | SEMRY Area / Far North | HIPC funding |
| 12. Project against the major scourges of food production Target / beneficiaries: | <ul style="list-style-type: none"> Strengthening producers' organizational capacities (intervention village brigades: phytosanitary advisers, support for equipment and treatment products, training) Strengthening the operational capacity of the air way treatment unit | Countrywide | HIPC funding |
| <ul style="list-style-type: none"> Food producers Producer organizations MINADER plant bases | | | |
| 13. Lowland development program Target / beneficiaries: | <ul style="list-style-type: none"> Grant, first to acquire pumps and piping and secondly for site development | Countrywide | HIPC funding |
| <ul style="list-style-type: none"> Producer organizations | | | |
| 14. Project to support the integration of young farmers Target / beneficiaries: | <ul style="list-style-type: none"> Support projects for young farmers on their own estates Setting up young farmers in agricultural development centers (sites developed by the state) Support implementing young farmers agricultural project | Countrywide | HIPC funding |
| <ul style="list-style-type: none"> Young farmers (18-40 years) | | | |
| 15. Revitalizing the potato sector project Target / beneficiaries: | <ul style="list-style-type: none"> Production support; Support for processing and marketing | Potato ecological zone (West and North Wes | HIPC funding |
| <ul style="list-style-type: none"> Young farmers (18-40 years) | | | |
| 16. Agricultural Value Chain Development Support Program (PADFA) Target / beneficiaries: | <ul style="list-style-type: none"> Increase rice and onion production Improve the storage, processing and marketing of targeted products Strengthen the technical and organizational capacity of rice and onion farmers | Far North, North, West and North West | With funding from IFAD this project was scheduled to start in August 2011 |
| <ul style="list-style-type: none"> Producer Organizations | | | |

Source: Survey data compiled by the author.

3.3 Specific government actions in support of food chains in Cameroon

A. Developing production and supply of agricultural products

The main actions of the state consisted in:

- (i) Establishing and continuing projects and programs to support strategic sectors;
- (ii) Signing agreements with domestic and foreign operators for strategic crop intensification;
- (iii) Improving product promotion and implementing incentives through the organization of small knowledge exchange groups and agricultural fairs at regional and national levels;
- (iv) Support to modernize production through the development of mechanization;
- (v) Rehabilitate national seed farms;
- (vi) Following instructions by the Head of State, commit to enact a land reform that ensures land availability to develop a second generation agriculture.

Support programs to strategic sectors began with the National Program for the Development of Roots and Tubers funded by IFAD, to which were added the projects financed by HIPC resources. All these instruments that addressed the sector in an integrated manner have mostly had results in terms of production. Cross-cutting and / or participatory regional programs complemented the activities of these programs. However, the assessment at the national meeting organized in Ebolowa from 17 to 22 January 2011 remained mixed.

Rehabilitation of seed farms was undertaken in the framework of the "emergency aid" program, implemented from 2008 on, following riots. It firstly ensures the production of sensitive crops (rice, maize, plantain and cassava). A budget of 5 billion XAF was granted for this purpose. This program helped equip producers of these sectors in agricultural inputs (seeds and seedlings, fertilizers and pesticides) and agricultural equipment. The program also organized regional fairs with the state subsidized the transport of producers and their products to supply large cities during the holiday season with food, promote consumption and rehabilitate farms. The rehabilitation program included the renovation of buildings and production equipment, securing land and boosting seed production in specialized farms. Currently, 38 farms have been identified and 10 of them have been rehabilitated and are productive again.

Some sectors show deficits that are so large that the country has to rely on imports. This is the case for the rice and maize sectors for which the state has opted to sign framework agreements making it easier for domestic or foreign private investors to ensure intensive production of these crops to reduce their deficits. An agreement was signed with Chinese investors for rice production on nearly 6 000 ha in Nanga Eboko, a similar agreement was signed with Italy for a concession on 2 000 ha in the northern region. Two domestic investors have been set up in the Adamawa region to each cultivate 1 000 ha of maize.

The government is currently undertaking a major land reform, with the aim of ensuring land availability for large farms (second generation agriculture), which was selected as an option in the GESP. This option implies a necessary modernization of the means of production and therefore increased mechanization. In terms of mechanization, the state is intervening by restructuring the National Centre for Agricultural Machinery, and having the Ebolowa tractor assembly plant start production was due to start around this time.

Organizing the Ebolowa agropastoral association has relaunched the promotion of agriculture and this foreshadows the return of associations as perennial frameworks that promote, develop and evaluate agricultural activities.

B. Local and Community Development

The state now intervenes in the context of decentralization. To take this inevitable option into account, the State has sought to:

- (i) implement regional and participatory programs;
- (ii) build basic infrastructure;
- (iii) support self-management initiatives in rural communities.

Programs which support decentralization (GRASSFIELD, RUMPI, PARFAR, PADC projects), plus the rural development projects financed by the EU especially in the East, the Far North and in the Northwest, mainly contribute to building basic rural infrastructure namely: warehouses, water points, community houses, playgrounds, irrigation schemes, water crossings, critical points, feeder roads and education and health facilities.

These programs also support self-management initiatives in rural communities, including developing local development plans, establishing local governance structures and the promoting income generating activities for the benefit of vulnerable groups, particularly women and youth.

C. Developing appropriate financing mechanisms

The state's actions in this area have entailed:

- (i) Improving budgetary resources for rural production administrations;
- (ii) Establishing the Cocoa and Coffee Development Fund (FODECC) to finance the coffee and cocoa sectors;
- (iii) Following instructions by the Head of State, immediately creating an agricultural bank and a SME bank with public funding;
- (iv) Taking into account financial constraints in implementing activities of various projects and programs;
- (v) Setting up a new project to support rural microfinance financed by IFAD.

In terms of funding, the renewed interest by government in agriculture is to be noted. Since 2007, there has been a significant increase in the budget of the Ministry of Agriculture, as shown in the following table:

Table 6. Evolution of the MINADER budget from 2007 to 2011

| Year | Amount in XAF million |
|------|-----------------------|
| 2007 | 40 129 |
| 2008 | 45 930 |
| 2009 | 55 251 |
| 2010 | 60 342 |
| 2011 | 72 000 |

Source: DRFP-MINADER

These additional financial resources allocated to rural public services have made it possible to subsidize the main sectors. In this context, aid was granted to organizations such as SEMRY, UNVDA, SODECOTON, SODECAO, MIDENO, SOWEDA, UCCAO and NWCA to support production in their respective territories and areas. The state also grants subsidies to small producers organized in CIGs to ensure the development of their activities.

The renewed interest in agriculture can also be confirmed by the return of key donors including: the World Bank (PACA funding of nearly 30 billion XAF), the European Union, AFD through the Contracts for Debt Relief and Development Agreement (C2D), where agriculture is chosen as the focal sector of the second C2D. IFAD, AfDB and many other donors are also contributing significantly.

As funding is considered a major constraint, most projects take this into account and offer financial support in the form of equipment, inputs, small equipment and / or direct financing micro-projects.

D. Developing employment and vocational training

The state has taken into account human capital in the development of agricultural production. If staff training is the responsibility of universities, the emergence of rural professions necessary to create jobs could not be accomplished without renovating agricultural training. For this, the state has:

- (i) set up the AFOP Program, whose purpose is to renovate the agricultural and professional training framework, under the C2D;
- (ii) taken initiatives to help young farmers start their farming activities.

Renovating the agricultural and professional training framework consists firstly in training and / or retraining of trainers, establishing training programs and professional standard references, and secondly in rehabilitating and building agricultural training and professional infrastructure and providing support for students and graduates to enter the workforce.

Initiatives to help young farmers start their farming activities are primarily under the Support Program for Young Farmers' Installation (PAIJA). Some youth are installed in areas managed by the state while others have set up their activities on their own land. Today the project has 6 sites comprising 450 ha with 160 young farmers.

E. Sustainable management of natural resources

The main state's actions have entailed:

- (i) Setting up a program of soil conservation in cotton growing areas;
- (ii) Taking into account the environment in production development;
- (iii) Strengthening registration of agricultural pesticides and pest control;
- (iv) Establishing in the near future a testing and diagnosis laboratory.

The ESA project (Water-Ground-Tree) funded by the C2D is located in the cotton area where land degradation has become acute. Generally, the State encourages abandoning slash-and-burn farming (with a three-year rotation) where the soil conservation period is three years in favor of intensive cultivation with a conservation horizon of ten years. Some agro-industries (SOSUCAM), faced with declining yields, are already thinking about sustainable farming techniques that could ensure soil conservation for 25 years.

Legislation now requires that an environmental impact study precede implementing major projects. Pesticide registration avoids the use of pesticides with strong residues, which is favorable in view of the advent of the EPA where quality control is of great interest.

F. Action on food insecurity risks

The state's intervention on managing food insecurity risks has focused on the following actions:

- (i) Extend the Grain Office to the whole country;
- (ii) Establish a structure to ensure consumer goods supply (MIRAP);
- (iii) Relaunch the National Food Security Program (NFSP);
- (iv) Intensify the fight against the major food scourges.

The Grain Office was initially limited to northern parts of the country and built warehouses to store products which supply people in lean periods. Subsequently, activities have evolved to now take into

account the construction of village granaries to help the villagers to manage their own stocks and be less dependent on food aid. This initiative, with positive results in the northern part of the country, will now extend to the south.

Food insecurity and, more generally, the issue of supply, especially in large urban centers, can now threaten civil peace. This is taken taken seriously since the 2008 riots during which human and material damage were extensive. This is why the President has created MIRAP to ensure the supply of consumer goods. The purpose of this structure is to provide opportunities for domestic production, especially for agricultural production by purchasing products, or in case of production shortfall, resort to imports. This structure could bring about an improvement in the imbalance between domestic production and consumption.

Relaunching the NFSP is a major state initiative that contributes to managing food insecurity risks. This program first had a pilot phase in four regions and should now extend over the entire territory with a significant state financial contribution (50 percent of the program budget). The aim of the program is to cover areas at risk of food insecurity.

G. Action for the development of the institutional framework

The state has intervened through:

- (i) the implementation of the AMO program (support to public work supervision)
- (ii) giving support to public-private dialogue by establishing consultative frameworks and restructuring the Chamber of Agriculture, Fisheries, Livestock and Forestry (CAPEF);
- (iii) promoting good governance by introducing transparency and cultivating results.

The AMO program has strengthened the administration services involved in the PPBS (Planning-Programming-Budgeting-Monitoring) chain. This support was made through an instrument known as a technical contractualised sheet where the relevant administration established an annual program with specific objectives and results, indicating intervention methods, beneficiaries, the implementation of a timetable, costs and delivery schedules. Thus, rural sector services have been strongly equipped with transport, computer hardware and office equipment and other equipment, combined with significant support to develop their activities.

The support program also focused on renovating the statistics system so that statistical information can be collected regularly to have reliable data for forecasts on the agricultural sector. Another aspect of the program focuses on helping decentralized services (regional offices through a program of improving services that is developed, submitted and approved prior to funding through the AMO program).

The government has also encouraged public-private dialogue by establishing consultative frameworks between the state and farmer organizations. The restructuring of CAPEF has been finalized with running offices. The dialogue instruments with the state seem to be ready to operate.

4. Conclusion

What can be observed today is that the government has clearly expressed its commitment to support sectors by implementing a number of initiatives intended to boost production, which is commendable. However, the targeting of interventions by sector and by regional area is not truly respected and there usually is more of a sprinkle to keep political actors satisfied.

Implemented approaches do not holistically take into account all of the sectors' functions in the value chain logic when it would provide solutions and practical support to stakeholders in the context of the different specific professions, organization and professionalization of the sector.

The processing and marketing chain in this framework is the one that remains the most unsuccessful and the majority of intervention projects and programs have failed to develop an expertise in this area to provide the support desired by stakeholders.

Access to financing remains a major constraint to implementing productive investments. The current practice is simply to encourage microfinance institutions to engage in agricultural financing without giving them the necessary means of action and adequate training to assess and monitor their clients' projects.

Given this situation, it is normal to expect that there still is a long way to go to transform staple food sectors into real economic development, social stability and poverty alleviation instruments.

4.1 Promoting food crops, a necessity for the population's well-being

Current policies in Central Africa seem to move more towards developing food products as a result of many factors among which we can mention:

- ✓ urbanization, which involves feeding a growing population that can have considerable power to make demands (riots);
- ✓ the situation in many countries where the primary sector, especially agriculture, due to endowments in factors of production, is the only competitive sector vis-à-vis the outside world in a globalized world;
- ✓ international trade stagnation of certain strategic sectors implying the development of new sectors;
- ✓ economic difficulties in countries characterized by low growth, rising unemployment and poverty, a phenomenon that mainly affects rural areas;
- ✓ consideration of environmental risks and the need to ensure better conservation of natural resources.

Policy makers, aware of this situation seem to have developed a new attitude toward agriculture in general, and especially vis-à-vis food production, taking into account demographic, ecological, economic and political effects that are linked to it.

This new perspective, favorable to agriculture can be observed from:

- a renewed interest to finance agriculture;
- how crop diversification is considered a strategic option in most countries and / or the need to promote the development of food crops;
- competitiveness development of sectors including the removal of endogenous and exogenous constraints to production and marketing;
- the development of downstream activities for the sectors (storage, processing, facilitating access to markets);

- improving targeting by considering value chain sectors that can protect the most vulnerable;
- improving the integration of promising sectors in both domestic and regional and international markets.

4.2 Renewed interest in financing agriculture

Agricultural policies have long been funded by development aid. According to the OECD, between 1973 and 2004, multilateral aid received by Cameroon over thirty years amounted to about 600 billion XAF. However, aid volatility did not favor the development of structural promising actions. Two periods should be considered: (i) a first period characterized by interventionist donations or bilateral and multilateral loans directly conditioning the success or failure of projects in a context where local expertise was relatively low, and (ii) a second period which began in the 80s before the end of five-year plans, with the project approach as the government was facing a crisis.

It must be recalled that it is in this context that Development Assistance Organizations introduced consultants who developed most of the old "all-purpose" policies that were recommended to African states including those of Central Africa (PASA, SRP, PSSA, etc.).

The evaluation of these policies, which were conceived with the MDGs in mind in the structural adjustment framework, has not been satisfactory. Ultimately, the results, while important in a few places, proved generally disappointing. Funding was then identified as a major constraint to develop agriculture in Africa. This is what brought African leaders to adopt the Maputo declaration allocating at least 10 percent of national budgetary resources to agriculture development.

In the case of Cameroon, there has been a significant improvement of budgetary resources allocated to agriculture and rural development. More generally, the GESF medium-term expenditure framework (MTEF) allocates nearly 7 percent of the resources to the development of agriculture as opposed to the PRSP with only nearly 4 percent.

4.3 Taking into account crop diversification and development

Interest in food crops has increased for economic, social and political reasons. The OECD noted that in 2006 the contribution of agriculture to GDP was around 20 percent in Cameroon. This structural data are still current and the study shows that the contribution of subsistence farming is higher than export crops. This is illustrated in the tables and graphs below:

The contribution to growth analysis confirms the privileged position of food crops as shown in the following table:

Table 7: GDP Evolution by sector in Cameroon

| | Historical | | | Estimated | | |
|------------------------------|------------|------|------|-----------|------|------|
| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 |
| GDP at constant price | 4.5 | 4.0 | 4.0 | 3.7 | 2.7 | 3.9 |
| Oil | -4.0 | -4.4 | -5.0 | -9.3 | -9.7 | 6.2 |
| Non oil | 5.5 | 4.9 | 4.9 | 4.9 | 3.6 | 3.7 |
| Primary sector | 3.7 | 3.7 | 3.5 | 4.4 | 2.9 | 3.3 |
| Agricultural | 3.7 | 4.7 | 3.4 | 4.3 | 3.4 | 4.1 |
| Food Crops | 4.6 | 5.0 | 3.5 | 3.4 | 3.9 | 4.2 |
| Export Products | -2.0 | 2.8 | 2.4 | 10.8 | -0.2 | 3.0 |
| Secondary sector | 1.0 | 0.8 | 0.5 | -0.2 | -1.9 | 3.1 |
| Tertiary sector | 8.5 | 7.3 | 7.4 | 6.6 | 5.2 | 5.2 |

Source: MINEFI/Economic Affairs Directorate

Table 8: Sectoral contribution to GDP growth, 2001-2006

| | Historical | | | Estimated | | |
|------------------|------------|------------|------------|------------|------------|------------|
| | 2001 | 2002 | 2003 | 2004 | 2005 | 2006 |
| Primary Sector | 0.8 | 0.7 | 0.7 | 0.9 | 0.6 | 0.7 |
| Agricultural | 0.6 | 0.7 | 0.5 | 0.7 | 0.5 | 0.6 |
| Food crops | 0.6 | 0.7 | 0.5 | 0.5 | 0.5 | 0.6 |
| Export Products | 0.0 | 0.1 | 0.0 | 0.2 | 0.0 | 0.1 |
| Secondary Sector | 0.3 | 0.2 | 0.2 | -0.1 | -0.6 | 0.9 |
| Tertiary Sector | 3.3 | 2.9 | 3.1 | 2.8 | 2.3 | 2.3 |
| GDP | 4.5 | 4.0 | 4.0 | 3.7 | 2.7 | 3.9 |

Source: MINEFI/Economic Affairs Directorate

This shift in focus, henceforth incorporating food crops is reflected in:

- (i) more attention paid to food crops in national economic policies and sectoral policies documents;
- (ii) implementing sector support projects and programs that provide multifaceted support to producers to strengthen their capacities and improve their performance;
- (iii) strengthening sector competitiveness by removing external constraints to production. This involves creating basic productive and marketing infrastructure, and strengthening producers' equipment, organization and structure;
- (iv) the geographic opening of production areas through the implementation of maintenance programs of dirt and rural roads, developing critical points to facilitate the flow of goods to consumption centers. At the level of CEMAC, the road construction network will link countries together;

- (v) in some countries, like Cameroon, reforms aimed at facilitating access to land are ongoing;
- (vi) agricultural research development now includes topics related to food crop development and the state invests heavily to support national agricultural extension and advisory services.

4.4 Considering the value chain and support to small producers

The value chain concept increasingly has a central position in agricultural considerations. This approach guides intervention programs and helps to focus not only on production, but also on the market: before producing you need to sell. Thus, policy concerns are moving more and more towards sharing the added value. It is essential to understand price formation, how to improve the efficiency of marketing channels, how to improve product quality, and the problems of market regulation, etc.

Specific interest is thus given to understanding the behavior of the operators involved in the value chain by analyzing all of their activities. This leads to a definition of stakeholders' scope of intervention to understand their behaviors and strategies. This is a systemic approach as analyzing interactions between economic agents within the sector and their various functions helps to understand how the system works. Generally, each economic agent pursues their own goals and develops strategies to meet their own needs. The behavior of one agent can then slow down the objectives of others. Only when the system works perfectly can each stakeholder achieve their objectives.

For small producers involved in food sectors, support must incorporate three functions: production, processing and marketing. Agricultural policies should aim to: (i) remove obstacles faced by stakeholders, (ii) create an enabling environment conducive to developing private initiatives, (iii) allow a healthy competition between players (iv) remove obstacles to the proper functioning of the market, and (v) promote a fair share of the added value generated. In short, in this context the state plays a regulatory role in the economic environment and anticipates trends that could be detrimental to the performance of the sector.

In the absence of state regulation, small producers will remain in poverty's vicious circle. Thus, support for professional and inter-professional organization and strengthening their capacity for action and negotiation has emerged as a major public intervention priority.

4.5 Improved marketing and integration into regional and international markets

The state shows a strong interest in trade development. In addition to facilitating the flow of products from production areas to consumption centers made up by urban areas, the state builds markets, especially in border areas.

African, Caribbean and Pacific (ACP) countries in general, and those of Central Africa in particular, are engaged in two parallel negotiating processes that are crucial to agricultural policies and trading: First, multilateral negotiations under the auspices of the WTO and second, bilateral negotiations with the European Union Economic Partnership Agreements (EPAs). Both negotiating frameworks are particularly important, as agriculture is an essential part of ACP economies. However, countries do not have a homogeneous position due to the relative importance of the agricultural sector in each economy, and national specificities.

Agricultural multilateral negotiation stakes nevertheless affect in particular the three pillars of the Agreement on Agriculture: (i) improving market access by reducing tariff and non-tariff barriers (ii) discipline on the use of domestic support so that the aid granted to farmers does not lead to distorting effects on markets and (iii) discipline on export subsidies. Regarding EPA negotiations stakes, they focus on products that can be excluded from EPA, the implementation timetable, but also on the development side which is supposed to distinguish an EPA from a free trade agreement (ALE).

The major constraint for countries is that these two processes are not easy to follow because, firstly, they require significant human capacity, and secondly, the two negotiation processes occur in a context marked by important changes in the EU's agricultural and trade policies (reform of the Common Agricultural Policy - CAP) and also by other bilateral or regional negotiation process involving ACP countries.

The state will have to deal with two major issues: (i) access to markets in the North and the EU in particular, and (ii) competition from imports from the North on national markets as well as on the dynamics of regional trade. To this end, the issue of quantitative and qualitative production development becomes important, given the persistence of non-tariff barriers imposed by the different legally binding standards in targeted markets. States are now forced to invest in setting up sample and diagnosis laboratories to ensure quality control of products and adopt stricter pesticide registration and use, given the maximum residue limit tolerated.

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