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The Rise of Agricultural Growth Poles in Africa

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Introduction

Africa has seen the emergence of 36 agricultural growth poles and 9 corridors over the past 15 years. They cover at least 3.5 million hectares of land in 23 countries (see Map and Annex below). In the last four years alone, over a dozen agropoles were established in four countries: Cameroon (2013); Democratic Republic of Congo (DRC) (2014); Gabon (2016); and Ivory Coast (2016). Some other countries, like Nigeria, Mali, Mozambique and Togo are currently exploring the potential for setting up their own.

Growth poles are simultaneous, coordinated investments in many sectors, like agriculture in the present case, to support self-sustaining industrialization in a country. They usually combine public and private investments and are specifically built around an already-existing resource at a specific location in an economy. They focus on a group of dynamic industries that are connected around a particular resource (African Development Bank [AfDB], 2016).

Agricultural growth poles—also known as agropoles—represent a new trend in Africa's agricultural development strategy. In 2014, African heads of state committed to eradicating hunger and rural poverty through a transformation of African agriculture, including a call to move from subsistence farming to commercial agriculture. A number of African governments see these growth poles and corridors as a way to attract private investment to promote agricultural transformation. They are also seen as a way to counter the negative impacts and publicity that resulted from leasing large tracts of farmland to investors, commonly referred to as "land grabs."

The agropole strategy is spearheaded by African governments, with financial and technical support from regional and multilateral organizations, such as the African Development Bank (AfDB), the United Nations Industrial Development Organisation (UNIDO) and the World Bank. For example, the "Feed Africa" program developed by the AfDB promises a path to commercial agriculture within 10 years (2016–2025). The plan is to modernize and revitalize the food sector, including by reinvigorating the strategy of increasing agricultural productivity. The World Bank, for example, has supported the financing and development of the Bagré Growth Pole in Burkina Faso.

Increasing investment flows into agriculture and food systems in developing countries is desperately needed. Over 800 million people go to bed hungry every night, of whom 70 per cent live in rural areas and depend on agriculture for their livelihoods. When done right, increased investment can help boost production, generate employment, increase incomes and promote economic development. But when done badly, it can exacerbate existing inequalities, undermine the livelihoods of small-scale farmers, and significantly deplete land, water, soil and other natural resources. Ensuring that the new wave of agropoles and growth corridors are effective requires robust policies, laws and practices to ensure that investment leads to sustainable development outcomes.

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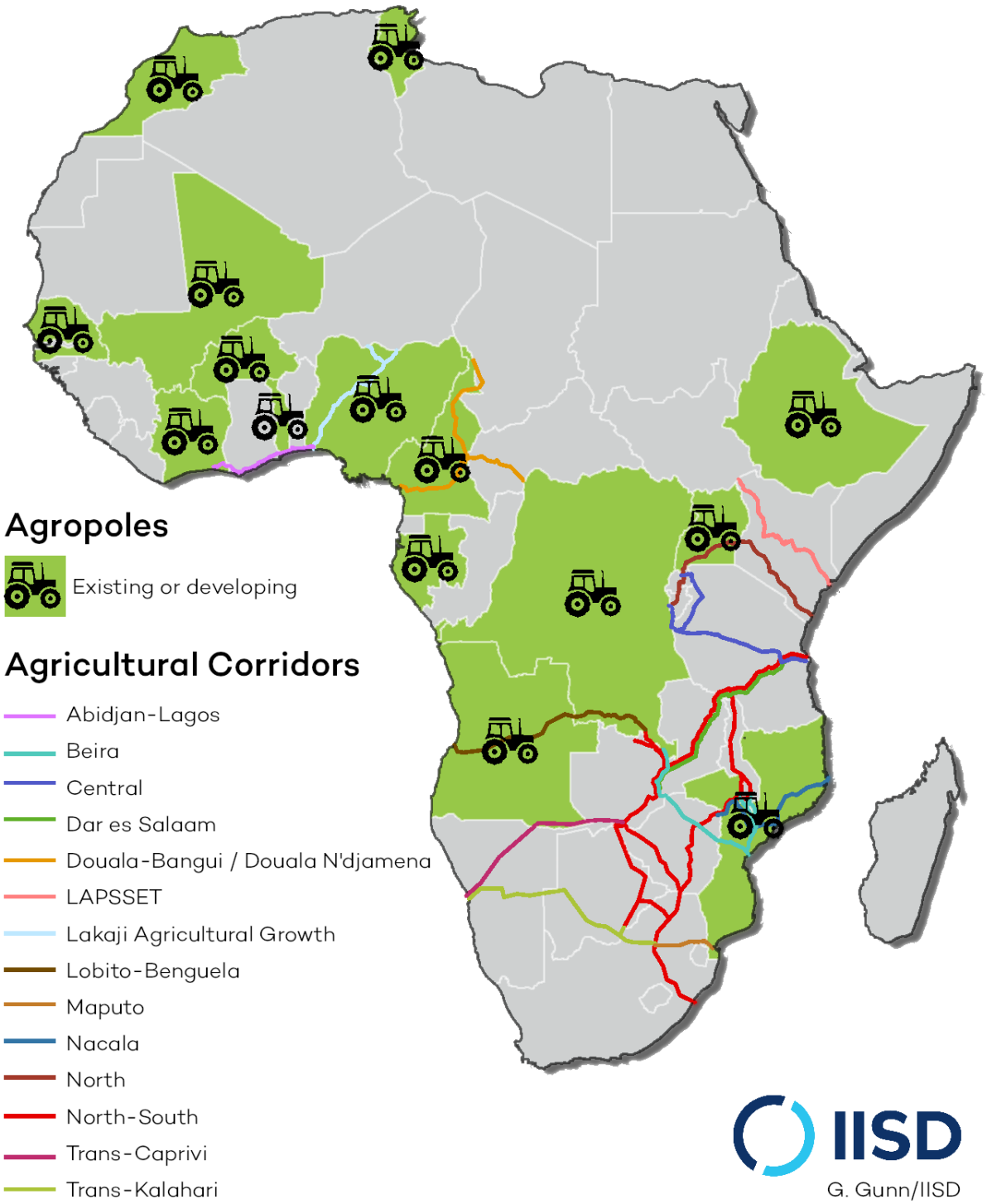
Agricultural Growth Poles and Corridors in Africa



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Agricultural Transformation Through Growth Poles

Agriculture is increasingly seen as the driving force for economic transformation in Africa. In order for this transformation to take place, a shift from dependency on producing a few raw agricultural commodities and toward the use of tools to promote agro-industrial development is required. African governments are experimenting with a range of different tools to promote this shift: agricultural corridors, growth poles, special economic zones, agro-based clusters, agro-industrial parks (see Table 1). Each approach is different depending on the scope, scale and type of investments that the country wants to attract. What they have in common is a combined and coordinated focus on investing in transport, power, communications and improving access to markets to create the conditions to unleash Africa's agricultural potential. They aim to improve the competitiveness of African countries by building on and diversifying their comparative advantages in agriculture and providing increased opportunities for spillover effect into other economic sectors (Independent Science and Partnership Council of the CGIAR, 2015).

Table 1. Prominent features of agro-industry investment promotion tools

	Overall purpose	Geographic scope	How tools attract investment
Agrocorridor	Integrated planning of infrastructure and agribusiness interventions	Regional, national or supranational (might encompass smaller spatial development initiatives [SDIs]); linear agglomeration across hundreds or thousands of kilometres	Coupling infrastructure investments with trade and regulatory policy reforms and sectoral development plans
Agro-based cluster	Network Linkages	Regional or provincial agglomeration (revolving around production area); from hundreds or thousands of hectares	Benefits of agglomeration economies and promotion of collective action
Agro-industrial park	Value addition by processing and innovation	Urban (accessible distance from production area); a few hectares	Common infrastructure, logistics facilities and dedicated services
SEZ	Export and FDI promotion	Urban (possibly near port area if it is an export-promotion zone); few hectares	Advantageous economic and regulatory frameworks
Agro-incubators	Entrepreneurship development	Urban; few hundred square metres	Common infrastructure (but not always), and dedicated services to create and coach new agribusiness firms

Source: Gàlvez-Nogales & Webber, 2017

The Challenges and Opportunities of Current Agricultural Growth Poles

It is too early to talk about the success or failure of agricultural growth zones, but there are cases where countries are facing operational constraints. In Morocco, the plan to set up six agropoles was delayed by five years, and only two are currently operational. One of them, the Meknes project, has only 21 per cent of its area occupied, and some projects are still under construction. The difficulties are linked, according to some experts, with the design of the strategy itself. A key element of that strategy is "aggregation": the grouping of farmers around private actors (aggregators) with strong managerial capacity in order to deal with land fragmentation and to ensure that aggregated holdings have access to modern production techniques. The aggregators are supposed to play key roles in the promotion, processing, monitoring and marketing of products.

The Mpal Agropole in Senegal took more than 10 years to start and still needs more investment to become operational. The need for additional investment exists for other agropoles, such as Bagrépôle in Burkina Faso and a few in Cameroon (Inter-réseaux, 2016). In addition to the shortage of investment, agropoles experience difficulties including such things as poor coordination among different actors, governance challenges, land availability and allocation, and insufficient consideration for socio-historical context (Inter-réseaux, 2016).

In Cameroon, the government initiated a program to promote "second generation agriculture," which they define as modern holdings for production, processing and marketing of plant, animals, fish and forest products. Cameroon's agropoles focus on mobilizing domestic private sector investment through a large number of small projects, rather than focusing on developing large areas of land with foreign investment. As of May 2017, they had established 40 small projects. So far, the program has mixed results, mainly due to a strong focus on increasing productions without the corresponding investments in improving market access and distribution channels.

One report found that many of the agro-industrial park initiatives face poor financial management, a lack of targeted strategies to attract investment and specific companies, poor infrastructure planning and inadequate market demand. There is, therefore, a need for a real planning process, at both the commercial and sustainable development levels, to ensure growth poles contribute to national and regional food security, create jobs and improve rural livelihoods, while at the same time managing environmental impacts responsibly.

Furthermore, the domestic rural economy of the host country must be able to absorb and integrate the new investment flows in existing systems of production. If this growth pole strategy fails to do so, there is a real risk that foreign investment could worsen the situation or create a dual system, with the consequence that small farmers may not benefit from the increased economic activities.

The Role of Laws, Policies and Institutions

Maximizing the opportunities offered by increased investment in agriculture requires the development of robust legal and policy frameworks. Many African governments are in the process of setting up special laws and regulations to facilitate the establishment of agricultural growth poles and corridors and attract investment. It is vital that these regulations are developed within the broader framework of the country's domestic legal system. If they diverge from the existing domestic legal system, there is a risk of creating enclaves where investors operating within the growth poles are exempt from the domestic laws of the host country, or at worst, apply laws that undermine or contradict the domestic legal system. New laws or regulations should not contradict or replace domestic laws. Rather they should be used to fill gaps specific to growth poles that may not be addressed in existing laws or to raise standards so investor practices conform to international standards and best practices.

A highly controversial issue is the use of stabilization provisions, often found in contracts between the state and investors, or occasionally in national investment laws. These are provisions that freeze domestic laws at the time an investment contract is signed. The result is that investors are either exempted from applying new laws that the country may amend or adopt at some point in the future, or the company may have legal recourse to compensation if such laws lead to a substantial increase in costs or decrease in profits. Governments should avoid the use of stabilization provisions in growth poles altogether. If the government decides to include a limited fiscal stabilization provision, it should not override or conflict with domestic law, but may form part of the fiscal bargain for the project.

Tax policies and incentives are another important case in point. There is now consensus among the International Monetary Fund (IMF), World Bank, Organisation for Economic Co-operation and Development (OECD) and UNIDO that the use of tax holidays and income tax exemptions by low-income countries is ineffective and inefficient (IMF, 2015). They do not increase investment flows, can sometimes deter investors who can be concerned about corruption, and severely undermine the government's ability to generate revenue to make the public investments needed to achieve sustainable development. A major review and reform of tax and fiscal incentives is required. This will take time. For now, it is important that the legal and policy instruments developed for agricultural growth poles do not provide additional incentives beyond what is already provided under the general tax laws, and that they ensure that any tax reforms that do come into place in the future will apply to these poles.

Box 1. Key messages from IMF, OECD, UN and World Bank's report: *Options for Low Income Countries' Effective and Efficient Use of Tax Incentives for Investment* (2015).

1. Tax incentives result in little additional investment, and most investors would have invested without them;
2. Good governance of incentives is critical for their effectiveness and efficiency. Transparency is necessary to facilitate accountability and reduce opportunities for rent seeking and corruption. Tax incentives should therefore be subject to the legislative process, consolidated under the tax law, and their fiscal costs reviewed annually as part of a tax-expenditure review. To the extent possible, the granting of tax incentives should be based on rules rather than discretion
3. The proliferation of incentives is largely a manifestation of international tax competition—which regional coordination can help mitigate,
4. More systematic evaluations are needed to facilitate informed decision making. Progress requires concerted action by multiple stakeholders to ensure evidence-based, transparent decision making.

Three Key Stages Toward Developing Responsible Agricultural Growth Poles

There are three key stages in the development of a responsible agricultural growth pole: vision, design and implementation. Engagement with local communities and small-scale farmers, particularly women, is critical at all stages of the process to ensure they are properly consulted, that they participate in decision making, and are integrated into new projects. Transparency is also critical at all stages.

Stage One: Vision

The vision for agriculture in most countries is set out in agricultural development plans. Agricultural growth poles can be one of many different tools to help achieve this vision. Using these plans as the starting point allows the government to better identify the type of investment that is needed (private, public, foreign, domestic or a mix). It also helps governments identify the types of sectors, crops, and processing facilities to prioritize, and therefore the types of companies to attract. It requires the identification of land and water needs, including assessing the availability of land, water and soils, and mapping out all legitimate land users with formal and informal rights, in line with the Committee on World Food Security (CFS) Voluntary Guidelines on the Responsible Governance of Tenure of Land, Forests and Fisheries (VGGTs). It requires the identification of investment needs that will contribute to food security, decent employment, and responsible management of natural resources, in line with the CFS Principles for Responsible Investment in Agriculture and Food Systems (CFS-RAI).

Stage Two: Design

Research shows that many investments fail for reasons that could have been identified prior to the commencement of operations (Tyler & Dixie, 2012; United Nations Conference on Trade and Development [UNCTAD] & World Bank, 2014). It is therefore important to have a proper process in place to maximize the possibility for successful investments and to manage the risks. Screening of potential investments and investors does more than reduce the risk of failure—it also helps ensure the projects selected are most likely to deliver positive development benefits (Smaller & Speller, 2015).

Some countries have established specialized agencies tasked with administering and managing agricultural growth poles. These agencies are responsible for developing legal and administrative tools aligned with the domestic legal and policy framework. The agencies deal concretely with all aspects of the implementation of activities inside the growth poles, including land leases, investment contracts, permits, and licences. They also assist investors in complying with relevant procedures for obtaining water permits, construction licences, access to electricity and any other authorization needed for agricultural activities.

The design stage requires the preparation of business feasibility studies, including commercial, financial and environmental feasibility, and the development of a business plan based on the outcome of those studies. And it requires pre-screening or vetting of prospective investors by the host country government. This will help host governments find high-quality investors and determine whether the investor has the necessary technical experience and financial resources to make the project operational (Smaller, 2015).

Environmental and social impact assessments (ESIAs) and management plans are also part of the design phase. Most African countries now have laws on ESIAs. The starting point for growth poles should be to apply existing laws and improve them by making reference to international standards and best practices in the agricultural sector, where needed. Multilateral and regional development banks all have appropriate safeguard systems that would apply in case they are involved and can strengthen compliance with certain standards. To be effective, the ESIA process should lead to the development of an environmental and social management plan. A third party should independently verify the assessments and plans.

Grievance mechanisms are important tools that allow investors to receive and resolve grievances from local communities. These mechanisms should also deal with concerns raised by employees on workplace issues. They should be designed in consultation with the community. Grievance mechanisms should also be understandable, accessible, transparent and culturally appropriate. In the context of agricultural growth poles, the agency responsible can be responsible for setting up and managing the grievance mechanism, and charge a fee to investors for the operation and maintenance of the mechanism.

An independent ombudsperson could also be set up to deal with disputes arising between the investor, the state or responsible agency, and other stakeholders. This can help avoid more formal dispute settlement processes. If formal disputes nevertheless arise, they would best be settled in domestic courts, rather than through international arbitration. Domestic processes will ensure a deeper understanding of land law and cultural contexts.

Stage Three: Implementation

Implementation of agropoles, including monitoring and enforcement, can be the most challenging stage for governments because of limited resources and capacity. It is important to allocate sufficient financial and human resources during this stage. Setting aside a percentage of the revenue from investors can help ensure that the government and the agency responsible for the growth pole has the capacity to monitor and evaluate the project effectively. Setting out clear reporting requirements and indicators will ensure the government or agency can regularly track whether the investor is fulfilling its development and environmental obligations and its commitment to the local community. Compliance can also be strengthened through processes involving local communities and farmers.

Conclusion

There has been a considerable rise in the number of agricultural growth poles and corridors in Africa in the past 15 years, which strongly coincides with the rise in investor interest in African agriculture. Africa has seen the emergence of 36 agricultural growth poles and 9 corridors over the past 15 years. They cover at least 3.5 million hectares of land in 23 countries (see Map and Annex below). Agricultural growth poles can be transformative tools to attract investment in the agriculture sector and help countries diversify from production of raw agricultural commodities toward broader agro-industrial development. Many attempts to attract responsible and sustainable investment to African agriculture have failed. Ensuring that the new wave of agropoles and growth corridors is effective requires robust policies, laws and practices to ensure that a possible new trend of investment helps Africa achieve the sustainable development goals the continent has set.

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Annex: List of some planned and operational agropoles in Africa

Table A1. Agropoles in Africa

Country	Operating agropoles	Planned agropoles		Size	Agriculture	Sources
		Agropole identified	Status			
Angola	Capanda agro-industrial zone			411,000 ha	Maize, vegetables, oil	SODEPAC (2017)
Burkina Faso	Bagrépôle			500,000 ha	Cereal, horticulture	Bagrepole (n.d.)
		Sourou	Feasibility studies under development	Not indicated	Not indicated	Premier Ministère du Burkina Faso (2016)
		Samendeni	Feasibility studies under development	Not indicated	Not indicated	
Cameroon*	34 agropoles			Not indicated	Soybean, cocoa, sorghum, maize, fish farming, swine and poultry farming	Programme Agropoles (2016)
DRC	Parc agro-industriel de Bukanga Lonzo			75,000 ha	Corn, grains, vegetable, poultry, fish, pork	Parc Agro (2017)
		Ruzizi	Prefeasibility study	80,000 ha	Potatoes, beans, maize, soya, beef, goats, dairy	DRC (2016)
		Takalama	Planned	4,500 ha	Crops, livestock	DRC (2016)
		Gbadolite	Planned	77,000 ha	Maize, soya, peanuts, legumes, beef, poultry, goats, fish, pigs	DRC (2016)
		Kindu	Prefeasibility study	150,000 ha	Beef, maize, soya, rice, poultry, rice	DRC (2016)
		Kinzau	Prefeasibility study	1,000 ha	Cabbage, spinach, tomato	DRC (2016)
		Luiza	Feasibility study developed	80,000 ha	Potatoes, beans, maize, soya, beef, goats, dairy	DRC (2016)
		Muhala	Planned	42,000 ha	Not indicated	DRC (2016)
		Mushie-Pentane	Prefeasibility study	45,000 ha	Sugar cane	DRC (2016)
		Nkundi	Planned	30,000 ha	Beef, poultry, goats, fish, pigs, dairy	DRC (2016)
		Kimbinga	Planned	20,000 ha	Unknown	DRC (2016)
		Businga	Planned	65,000 ha	Maize, soya, peanuts, legumes, sunflowers, beef, poultry, goats, fish, pigs	DRC (2016)
		Kaniama kasese	Planned	103,000 ha	Maize, soya, peanuts, sunflowers, vegetables, wheat, beef, poultry, goats, fish, pigs	DRC (2016)
		Yangambi	Planned	85,000 ha	Maize, soya, coffee, cocoa	DRC (2016)

Country	Operating agropoles	Planned agropoles: Agropole identified	Planned agropoles: Status	Size	Agriculture	Sources
DRC (continued)		Mweka Kasai	Planned	82,500 ha	Maize, soya, peanuts, sunflowers, vegetables, beef, poultry, goats, fish, pigs	DRC (2016)
		Dibaya Lubwe	Planned	48,000 ha	Maize, soya, peanuts, sunflowers, vegetables, beef, poultry, goats, fish, pigs	DRC (2016)
		Kasongo	Planned	75,000 ha	Maize, soya, peanuts, sunflowers, vegetables, beef, poultry, goats, fish, pigs	DRC (2016)
		Bumba	Planned	110,000 ha	Maize, legumes, soya, rice, avocado, banana, plantain, peanuts, yam, goats, fish, pigs	DRC (2016)
		Ngandajika	Planned	78,000 ha	maize, soya, peanuts, sunflowers, vegetables, beef, poultry, goats, fish, pigs	DRC (2016)
		Lotokila	Planned	95,000 ha	Maize, soya, rice, poultry, fish, beef	DRC (2016)
		Tshela	Planned	22,000 ha	Plantain	DRC (2016)
Côte d'Ivoire		agropole de Tiébissou	Feasibility study done	1,169,500 ha	Rice, maize, manioc, vegetables, fish, pork	African Development Bank (2016b)
		agropole du Bounkani	Planned	Not indicated	Not indicated	
		agropoles du Poro	Planned	Not indicated	Not indicated	
		agropole du Tonkpi	Planned	Not indicated	Not indicated	
Ethiopia	Oromia (Bulbula IAIP)			263 ha (IAIP)/334,971 ha	Wheat, barley, haricot bean, fava bean, tomato, potato, fruits and vegetables, dairy, fish, poultry, honey and meat	Unido (2016)
	Amhara (Bure IAIP)			154.99 ha (IAIP)/ 398,095 ha	Sorghum, sesame, fruits and vegetables, dairy, meat and animal product	Unido (2016)
	Tigray (BaekerIAIP)			150.92 ha (IAIP)/ 524,706 ha	Sorghum, sesame, fruits and vegetables, dairy, honey, meat and animal products	Unido (2016)
	Southern Ethiopia (Yirgalem states)			108.80 ha (IAIP)/163,411 ha	Cereals, coffee, fruits, vegetable, animal products	Unido (2016)
Gabon		One planned	Feasibility study plans	Not indicated	Not indicated	Bongo Doit Partir-Modwoam (2015)

Country	Operating agropoles	Planned agropoles		Size	Agriculture	Sources
		Agropole identified	Status			
Mali		l'Office du Niger	Feasibility studies under development	Not indicated	Not indicated	Ministère de l'Agriculture (n.d.)
		l'agropole Koulikoro	Feasibility studies under development	Not indicated	Not indicated	
		L'agropole de Kidal	Feasibility studies under development	Not indicated	Not indicated	
		Agropole de Baguinéda	Feasibility studies under development	Not indicated	Not indicated	
		One planned		Not indicated	Not indicated	
Morocco	Agropole de Meknes			640 ha	Milk, cereals, meat, fruit, vegetables	Caisse de Dépôt et de Gestion (2015)
	Agropole de Berkane (Oriental)			102 ha	Citrus packaging, cereals and dairy industry, refrigerated warehouses	Med Est (2014)
	Agropole de Tadla			208 ha	Olive growing, citrus farming, livestock	Ametys (2016)
		Agropole du Haouz	Planned			Creative Lab Engineering (2012)
		Agropole du Gharb	Planned			
Mozambique	Integrated Growth Poles Project			Not indicated	crops	World Bank (2017)
Nigeria	Imota Agro-Industrial Park			1,000 ha	rice	PM News (2012)
		Agro-industrial park for the North West zone	Planned	Not indicated	Not indicated	Vanguard (2017)
Uganda	China- Uganda Agricultural Industrial Park			25,000 ha	Crop cultivation and processing of farm produce, poultry and livestock	Daily Monitor (2016)
		Kashari Agricultural Park	Land not yet allocated	147 ha	Crops	Uganda Investment Authority (2017)
Sénégal	L'agropole de Mpa				Livestock, potatoes, fisheries	All Africa (2009)
		Three agropoles envisaged	Planned	Not indicated	Not indicated	UNIDO (2014)
Togo		agropole du Haut Mono	Call for proposal	Not indicated	Not indicated	African Development Bank (2016b)
		agropole de l'Oti	Call for proposal	Not indicated	Not indicated	
		agropole de Kara	Call for proposal	Not indicated	Not indicated	
Tunisia	Pôle de compétitivité de Bizerte			45 ha	Milk, cereals, meat	République Tunisienne (2012)

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