



The politics of policy failure in Ghana: The case of oil palm

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ABSTRACT

The paper argues that political economy factors have hindered the development of the oil palm value chain in Ghana, which has consistently underperformed despite significant policy support and the sector's strategic importance to the national economy. These factors include political instability between the mid-1960s and early 1980s, as well as the emergence of a competitive clientelist political settlement since the country's return to constitutional rule. Drawing on key informant interviews and documentary sources, the paper demonstrates that policies over the past two decades have failed to address the peculiar nature of the value chain, which is bifurcated into a smallholder/artisanal sub-sector and an estate/industrial processing sub-sector. Since the 1990s, one aspect of policy failure in the sector has been the 'paradox of good intentions' that arises from the simultaneous pursuit of economic transformation and inclusive development in a political context described by some scholars as 'strong democracy, weak state'. The logic of electoral competition shortens politicians' time horizons, predisposing them to prioritise highly visible distributive policies (like input subsidies) over structural reforms (like land tenure issues or solving market frictions). Consequently, despite almost two centuries of continuous policy support, the sector's productivity remains at the same level it would have been if it had been left to operate without any state assistance.

1. Introduction

Oil palm (*Elaeis guineensis*) has long been of strategic importance to Ghana's national economy. However, despite its significance as the country's second most important cash crop, the sector has consistently underperformed, with production unable to meet the domestic demand. Successive governments have devoted a great deal of policy attention and resources to developing the oil palm economy as part of a broader agenda of stimulating agro-industrialisation and reducing rural poverty, but these efforts have only yielded weak results. This paper conducts a value chain analysis of the crop, highlighting the factors that shape the performance of the sector, and the distribution of losses and rewards among participants along the chain. This paper adopts a political economy lens, and as such, concentrates its analysis on the macro-level political forces at play. For insights into some of the micro-level dynamics in the sector, see [Dzanku et al. \(2020\)](#) and [Takyiakwaa et al. \(2021\)](#).

A political economy analysis that considers the broad structural and relational factors at play is necessary to fully comprehend how particular value chains operate. The political settlement approach is a useful framework in this regard, as it acknowledges that policy implementation is influenced by the context in which it occurs, including informal

practices and the interest groups involved in policy selection and implementation. This paper attributes the poor performance of the oil palm sector to the gap between the peculiar needs of the value chain and the policies designed to improve its productivity. The oil palm value chain is divided into two sub-sectors: a smallholder and artisanal sub-sector on one hand and an estate-industrial processing sub-sector on the other, each with distinct organisational dynamics and interests. However, agricultural policies targeting the value chain treat it as a single undifferentiated entity. Thus, the vast resources allocated to the sector since independence have not succeeded in advancing the stated policy goals of improving smallholder livelihoods and promoting economic development.

This problem is exacerbated by the 'paradox of good intentions': namely a rhetorical commitment to poverty reduction, economic transformation, and vibrant multiparty democracy, the combination of which leads to the wasteful spending of limited resources in pursuit of policies ostensibly designed to alleviate poverty but which largely only advance short-term electoral calculations. The logic of electoral competition shortens politicians' time horizons and incentivises them to prioritise highly visible distributional policies (like input subsidies) over longer term structural issues (like land tenure reforms or solving market frictions) ([Asante, 2022](#); [Sowah et al., 2023](#); [Whitfield, 2011b](#)).

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The paper is structured as follows. The next section provides a theoretical framework for the study, followed by an overview of the global oil palm industry. The fourth section presents a historical account of the rise and continued decline of Ghana's oil palm economy, while the fifth and sixth sections provide an overview of the value chain and the challenges confronting actors along the chain, respectively. The following section analyses government attempts to grow the sector and the outcomes of these interventions. Finally, the conclusion returns to the question of why an economic sector would continue to underperform despite receiving consistent policy support for over a century and a half.

2. Competitive clientelism: A brief overview of Ghana's political settlement in the Fourth Republic

The political settlement refers to the distribution and exercise of power within society, which is shaped by a configuration of historical, economic, social, and cultural factors. This approach to understanding politics and development highlights how the incentive structures underlying policy formulation and implementation drive the politics of development, as evidenced by numerous case studies (Behuria 2020; Appiah and Abdulai 2017; Asante 2012; Fold and Whitfield 2012). For instance, policies designed to encourage production for the domestic market may divert state resources away from supporting production for exports, leading to the development of factions competing to protect their interests.

When formulating policies or distributing resources, political leaders attempt to minimise the risks posed by factions that have the ability to cause 'real political trouble' (Burton and Higley 2001 cited in Hickey 2013). Ruling coalitions, therefore, consider this threat and, depending on the level of regime vulnerability, may respond in a variety of ways, including heavy-handed responses, conciliatory moves – via co-optation, rent distribution etc. – or ignoring the threat altogether. If a policy proposal is likely to involve heavy losses for a social group or faction which is strong enough to mobilise credible opposition to the government, policymakers are likely to back down, or to make concessions to the affected groups. On the other hand, where social groups are weak or unable to effectively mobilise substantial opposition, it is unlikely that policymakers will seriously consider their concerns when formulating policies. In these struggles, social groups who have 'holding power', i.e. those who can absorb short-term losses while maintaining their position in the relative distribution of power, are more likely to win in the long-term (Khan 2018). These dynamics are apparent, some more so than others, in the organisation of Ghana's oil palm value chain.

In the 1980s, Ghana pursued fundamental liberal economic reforms and soon followed with political liberalisation in the early 1990s. While these reforms have helped create the conditions for macroeconomic stability and brought about broad human development dividends (Resnick, 2019), they have failed the lay the groundwork for structural economic transformation (Whitfield, 2011). Instead, the pursuit of political liberalisation in the context of a fragile economy has shaped Ghana's political system in the last thirty years into what Resnick (2019) describes as a 'strong democracy, weak state'. This has come about because of the proliferation of factional groupings with the promulgation of the Fourth Republican Constitution of 1992. The return to constitutional rule opened the door for a variety of previously suppressed constituencies to make demands on the state (Boafo-Arthur 1999). In the context of a highly competitive electoral contests, political elites tend to adopt short-term policies such as providing highly visible public goods (Appiah and Abdulai, 2007; Asante and Mullard 2021), resulting in a competitive clientelist political system where patronage politics becomes entrenched alongside the alternation of political power in free and fair elections (Asante and Khisa 2019; Oduro et al. 2014).

Interest groups in Ghana's competitive clientelist political settlement have been able to wield significant influence over democratic processes, leading to policies that prioritise the interests of more powerful groups over those of marginalised communities (Resnick 2019: 54). This system

has hindered efforts to establish effective public agencies in Ghana, a state of affairs which Abdulai (2021) attributes to the dispersal of power between the two dominant political parties—the National Democratic Congress (NDC) and the New Patriotic Party (NPP)—and internal fragmentation within these parties. In order to ensure their short-term political survival, political elites employ tactics, such as replacing senior bureaucrats during election turnovers, which have over the years undermined the continuity, professionalism, and long-term planning orientation of the public service (Abdulai 2021: 7). It is within this context of competitive clientelism and weak capacity of the relevant state agencies to coherently pursue policies that this paper explores the poor performance of the country's oil palm economy.

2.1. A note on methods

This paper draws on both primary and secondary sources of data. The research started with a preliminary overview of the empirical and theoretical literature on the oil palm economy in Ghana. As such, the study reviewed academic works published in books, journal articles, working papers, and research reports. It also reviewed policy documents and grey literature from government agencies like the Ministry of Food and Agriculture and its subsidiary units such as the Survey and Research Department (SRID), the Directorate of Tree Crop Services, as well as other stakeholders in civil society and the donor community.

The secondary data was complemented with primary data and was collected through in-depth interviews with twelve knowledgeable actors and participants in the oil palm value chain in 2020. This included producer associations like the Oil Palm Development Association of Ghana (OPDAG); officials of the Ministry of Food and Agriculture; representatives of donor agencies like the Dutch Embassy and Agence Française de Développement (AFD); and officials of non-governmental organisations (NGOs) or civil society organisations (CSOs) like Solidaridad and Proforest. The interviews covered a number of themes, including the structure of the oil palm value chain, the key stages and processes involved along the chain, the challenges and opportunities for the different actors involved in the chain, and how policymakers have sought to address the challenges facing the country's oil palm economy.

All interviews were audio recorded with the permission of the respondents and subsequently transcribed. Content analysis and thematic network analyses were performed on the secondary and primary sources, respectively. To protect the identity of respondents, the paper uses the institutional affiliation rather than the names of respondents in the text.

3. The global oil palm industry

Although oil palm is indigenous to West Africa, it is now most successfully cultivated as an industrial crop in South-East Asia, where it was first introduced as an ornamental crop in the early 1870s. As Table 1

Table 1
National contribution to world palm oil world production.

Rank	Country	% of world production	Production volume
1	Indonesia	59	45,500
2	Malaysia	25	19,200
3	Thailand	4	3,260
4	Colombia	2	1,768
5	Nigeria	2	1,400
6	Guatemala	1	910
7	Papua New Guinea	1	650
8	Cote d'Ivoire	1	600
9	Honduras	1	600
10	Brazil	1	570
15	Ghana	< 1	300

Source: USDA Foreign Agricultural Service (Oil Palm Explorer) Retrieved from <https://ipad.fas.usda.gov/cropexplorer/cropview/commodityView.aspx?cropid=4243000> (accessed 10 April 2023).

shows, Indonesia and Malaysia are currently the leading producers of the commodity, accounting for about 84 percent of global palm oil output in 2022, with Indonesia contributing almost 60 percent of the global supply (Ramadhani and Santoso, 2019). Together, both countries account for 64.7 million metric tonnes (mt) out of the total world output of 77,559 million mt of the commodity in 2022. Of the top ten producing countries, only two – Nigeria and Ivory Coast – are in Africa, with the two countries together accounting for a negligible 3 percent of the global supply. Ghana ranks 15th and produces less than 1 percent of the global output.

In the two leading producer countries, the oil palm economy makes a substantial contribution to their respective national economies (Hashemvand Khiabani and Takeuchi, 2020). Figures cited in Purnomo et al. (2020) indicates that oil palm contributed 17 percent of Indonesia's 2014 agricultural GDP. The export of Indonesian palm oil reached \$23 billion in 2017, and the industry employed 2 million smallholders and 7.8 million agricultural workers. In Malaysia, oil palm is a major driver of agro industrialisation, the fourth largest contributor to the national economy, and has played a major role in the improvement of agrarian livelihoods (Alam et al., 2015).

Of the two countries, Malaysia has been the most successful at diversifying its oil palm sector. Downstream processing of palm oil has exponentially increased in Malaysia since the 1970s. Accordingly, its export of crude palm oil has dropped precipitously from 70 percent in the early 1970s to less than one percent in 1995 (Alias et al., 1999 cited in Nambiappan et al., 2018). Since the late 1980s, Malaysia has had surplus refinery capacity and is now a net importer of CPO to feed its installed refinery capacity. Most of these imports come from Indonesia, where the downstream sector is not as developed (Nambiappan et al., 2018).

One of the sharpest contrasts between the oil palm industries in South East Asia and West Africa is the prominent role played by private estates relative to smallholders in the production of the crop. In Indonesia, private estates have contributed more than half of total palm oil tonnage produced, and this has steadily increased from 52 percent in 2007 to 57.5 percent in 2014 (Ramadhani and Santoso, 2019). The situation is similar in Malaysia, where private estates account for over 61 percent of the total planted area in 2016 (Nambiappan et al., 2018). However, different policy incentives have led to different outcomes in the two leading producer countries in Asia. In Indonesia, the government sought to develop the industry through import substitution. As such, it introduced policies to encourage foreign investment through trade liberalisation and deregulation, leading to the massive expansion in production in the 1990s and 2000s and the increasing importance of foreign investors in the sector. By contrast, Malaysia pursued an export-led strategy that necessitated a focus on competitiveness through technical efficiency and innovation, and the focus on high-end value addition along the value chain (Nambiappan et al., 2018).

The dominance of Indonesia and Malaysia in the global oil palm industry is reflected in their significant contribution to global production. In contrast, only two African countries, Nigeria and Ivory Coast, are among the top ten producing countries, in spite the fact that the crop is indigenous to West Africa, where agro-climatic conditions remain optimal for its cultivation. However, the divergent outcomes resulting from the policies pursued by Indonesia and Malaysia highlight the importance of adopting a political economy lens in the analysis of the performance of sector.

4. History and performance of the oil palm economy in Ghana

Palm oil production in Gold Coast/Ghana became politically important from the early decades of the nineteenth century (Asante 2018; Dumett 1983). Production has always been dominated by smallholder farmers and an attempt by the colonial government in the 1890s to encourage the development of plantations through land tenure reforms proved to be politically disastrous (Asante, 2019; Kimble 1963).

This event turned out to be fateful by discouraging the colonial government from subsequent land tenure reforms and ensured that small-scale or peasant farmers dominated the production of the country's main commercial crops (like oil palm, rubber, coffee, and subsequently cocoa). Thus, in spite of subsequent incentives created by later governments, plantations or formal estates accounted for only a small fraction of output unlike the case in South East Asia (Fold and Whitfield 2012).

After a high point in 1884, the oil palm economy entered a phase of rapid decline due to a combination of factors, including plummeting world market prices for the commodity, felling of trees to produce palm wine, and the rise of cocoa as the leading export crop (Gyasi 1992; Dummet 1983). Belated attempts by the colonial government did little to stop the decline of the oil palm sector. This included efforts to incentivise estate production with the Oil Palm Ordinance of 1912, which allowed the government to award processing rights to all fruits produced within 16 km of a mill, and an arrangement under the 1929 General Scheme for Subsidising Palm Oil Factories, which subsidised large mills if fruits fell below five-sixths of processing capacity (Gyasi 1992). Efforts by subsequent governments (discussed below) have equally failed to substantially expand production.

The current performance of the sector is hard to accurately access because of data inadequacies, a situation which partly reflects wider problems facing the industry.¹ Available information on the current state of the industry comes from baseline estimates from the Planting for Export and Rural Development (PERD) programme, which shows a slight year-on-year increase in production since the mid-2000s. Production of CPO has also consistently increased since the early 2000s. In the period between 2006 and 2015, production grew by more than 204,000 t. However, independent smallholders accounted for a huge bulk of the output. In fact, over the period, CPO production by estate mills has declined by 2956 t while smallholder production has almost doubled (see Table 2).

If productive capacity is enhanced, oil palm producing countries in Africa stand to reap substantial gains due to growing demand for palm oil within the continent, and on the world market (MASDAR 2011). There is also a large demand for palm oil for home consumption in Ghana with an estimated 2.4 percent per annum growth in consumption. Policy initiatives since the early 2000s have been focused on the opportunities arising from the regional and global demand for the commodity, although the immediate aim has been to reduce the import bill on palm oil. However, the vast potential of the sector remains unrealised. A master plan study commissioned by MoFA in 2010 estimates that, if current production trends persist, CPO supply will only grow at a rate of 3 per cent per annum, meaning that in the 15-year period between 2010 and 2025, estimated production will only increase from 244,335mt to 382,000mt. This growth in production will not be enough to absorb domestic demand, a situation which could shoot up the deficit from 32,000mt to 127,000mt (MASDAR 2011).

5. The structure of the oil palm value chain in Ghana

The structure of Ghana's oil palm industry has been influenced by its two primary markets, domestic consumption and industrial processing, leading to two separate sub-sectors. The industrial processing sub-sector includes large- and medium-scale plantations and processing mills, while the home consumption sub-sector is dominated by smallholders and faces challenges such as low-yielding varieties, fragmented landholdings, and rudimentary technology (Osei-Amponsah et al. 2014; Fold and Whitfield 2012: 14). Although analytically distinct, there are

¹ Producing companies are reluctant to share information that their competitors may take advantage of, or which could increase their tax liability (interview with executive of OPDAG, March 2020, and with official of MoFA, March 2020).

Table 2
Crude Palm Oil Production Estimates (tonnes).

Companies	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
GOPDC	28,743.10	17,842.70	18,055.68	20,143.00	18,960.54	18,045.80	17,131.05	16,216.30	17,027.12	17,476.16
BOPP	16,485.00	15,305.00	14,960.18	14,124.00	14,232.57	13,916.82	13,601.07	17,554.00	17,817.31	18,173.66
TOPP	20,348.00	14,797.10	14,249.66	17,373.00	14,544.40	13,627.94	12,711.48	11,795.02	11,971.95	12,930.16
NGL (NOPL)	7,019.00	7,721.00	8,492.83	12,775.00	11,812.93	12,856.74	13,900.55	14,944.36	15,168.53	15,579.07
AMEEN	9,805.00	10,785.50	11,863.68	11,000.00	12,589.86	13,314.50	14,039.14	14,763.78	14,985.24	15,284.94
Sub-Total	82,400.10	66,451.30	67,622.03	75,415.00	72,140.30	71,761.80	71,383.29	75,273.46	76,970.13	79,443.99
Medium-scale mills	8,387.00	9,225.70	10,148.07	10,836.00	11,584.66	12,357.44	13,130.22	13,903.00	14,598.15	15,345.05
Small-scale and other private holdings	250,888.00	275,976.80	303,572.32	316,222.00	342,012.51	364,279.77	386,547.04	408,814.30	429,255.02	450,913.43

Source: MoFA (2017).

overlaps between the two sub-sectors at various points along the value chain.

The separate stages in the value chain include input supply, cultivation, processing, and marketing. Important actors at the input level include MoFA, which supplies technical and extension services to smallholder farmers (Ofosu-Budu and Sarpong 2013); the Oil Palm Research Institute (OPRI), which carries out research into oil palm development and supplies planting materials to farmers; and agro-input suppliers, who retail fertilisers, weedicides and other inputs on the open market.²

At the next levels of the value chain, there are three categories of actors involved in production: 1) independent smallholders cultivating less than 10 ha, 2) medium-scale plantations, and 3) large industrial plantations or estates. Independent smallholders dominate production, accounting for about 80 per cent of all fresh fruit bunches (FFBs) produced (MASDAR 2011; Ofosu-Budu and Sarpong 2013). The estate produces for the industrial processing market while independent smallholders and medium-scale plantations serve the domestic consumption market. However, the estate mills often source for FFBs from smallholders, especially during the lean seasons.

Palm oil processing serves both domestic consumption and industrial purposes. The home-consumption market is served by the small-scale or artisanal processors, who are mostly women (Ofosu-Budu and Sarpong 2013). Artisanal processing is inefficient because it relies on rudimentary technology, a semi-mechanised processor – called *Kramer* – and the oil extraction rate is low. The large-scale mills are owned by the estate plantations, namely Ghana Oil Palm Development Corporation (GOPDC), Benso Oil Palm Plantation (BOPP), Twifo Oil Palm Plantation (TOPP), Ameen Sangari, Norpalm Ghana Limited, and Juaben Oil Mills (MASDAR 2011: 2.7).

Apart from some basic processing activities like soap production for the local market, the artisanal and medium-scale mills are virtually absent in the downstream processing stage of the value chain, which is wholly dominated by the estate mills. Unilever processes soap and cooking oil called Frytol, and GOPDC produces King Vegetable Oil. GOPDC has a refinery/fractionation plant, a biomethanation plant, and produces palm kernel cake pellets. Companies in Ghana who also have refinery and fractionation facilities include Unilever, PZ Cussons, and GOPDC (MASDAR 2011). However, Ghana has not yet developed processing capacity for advanced industrial applications, such as oleo chemicals, pulp and paper, and butter fats (MASDAR 2011; Fold and Whitfield 2012).

5.1. Coalitions and interests in the value chain

A variety of stakeholders have direct interests in the value chain.

² Separate interviews with officials of OPDAG, of OPRI, and of Artisanal Palm Oil, March 2020.

First, there are aggregators who connect smallholder farmers to the large estates. Some aggregators are directly employed by processing companies, but many operate on their own account. Transportation is another crucial support service along the value chain because of the high perishability of the FFB which necessitates that the harvests be transported quickly for downstream-processing, or to home-consumption markets, as soon as possible. This is often hampered by the poor state of the roads in communities producing the crop. Such obstacles negatively affects farmers' income and impedes efforts to improve productivity (Heerink, Atsma and Fosu 1997).

An umbrella association represents the interests of actors along the value chain. Established in 1985 as the Ghana Oil Palm Development Association (GOPDA), it declined in influence in the early 2000s. With support from Busac Fund and Solidaridad, the association was revived in 2015 as the Oil Palm Development Association of Ghana (OPDAG) which pursued many of the same goals as GOPDA.³ However, an important new objective of the association is ensuring environmental sustainability in compliance with the Roundtable on Sustainable Palm Oil (RSPO), as stated on the association's website (OPDAG no dateOPDAG (2020)).

Bilateral and multilateral agencies also play a role in the value chain, including the Commonwealth Development Corporation, European Union, World Bank, International Finance Corporation, African Development Bank, Nederlandse Financierings-Maatschappij voor Ontwikkelingslanden N.V., and Agence Française de Développement (AFD). In 1995, together with the World Bank, AFD provided a credit facility to the Ghanaian government to finance tree crops like oil palm and rubber under the Programme for the Promotion of Perennial Crops (PPPC), and has since supported oil palm and rubber outgrower schemes (Ambassade de France au Ghana 2015). Similarly, the Embassy of the Netherlands has been involved in the oil palm value chain since 2012, providing support under the Sustainable West African Oil Palm Programme (SWAPP) to promote private sector participation in the value chain and encouraging sustainable production.

Civil society or non-governmental organisations (CSOs and NGOs) active in the value chain have usually worked closely with donor agencies to channel resources to actors within the industry, or to organise training. The Embassy of the Netherlands, for instance, supports OPDAG indirectly through Solidaridad.⁴ Since 2012, Solidaridad has been involved in the value chain under the SWAPP, by providing training to smallholders on best practices under the RSPO.⁵ Proforest, another non-profit organisation, also supports sustainable production of agricultural commodities and works closely with the government, companies, and other CSOs involved in the value chain on the national

³ Separate interviews with executive of OPDAG, of officials of Solidaridad, and of Busac Fund, March 2020.

⁴ Interview with official of Embassy of the Netherlands, March 2022.

⁵ Separate interviews with officials of the Embassy of the Netherlands and of Solidaridad, March 2020.

interpretation of the RSPO.⁶ In line with their concern over environmental sustainability, they assist smallholders and artisanal millers to intensify production in order to curb the exploitation of forest lands for expansion. They were instrumental in the revival of the industry association, the Oil Palm Development Association of Ghana (OPDAG) and worked closely with OPDAG and other stakeholders to successfully advocate for the passage of the bill setting up Tree Crops Development Authority (TCDA).⁷

6. Challenges confronting the actors in the value chain

Due to the segmented nature of the value chain, smallholders and estates confront distinct sets of challenges. The productivity of independent smallholders is constrained by lack of access to improved planting materials. This ultimately lowers the productivity of the entire value chain, since smallholders account for a large share of production. Further, access to farmland for smallholder farmers is becoming an increasingly complicated issue. Tenure insecurities arising from ownership disputes is an established problem confronting smallholders. However, since the deregulations and market liberalisation that followed in the wake of structural adjustment in the 1980s, large-scale land acquisitions facilitated by local chiefs has intensified land dispossession and tenure insecurities across the country, especially for women (Anku et al. 2022; Tsikata and Yaro 2013).

The industrial segment of the value chain faces its own sets of challenges. The lack of litigation-free land poses a serious problem to any attempt by estates to expand production. According to the MoFA-commissioned masterplan, up to 50,000 ha parcels of lands 'are potentially available' in the Western and Central Regions for the establishment or expansion of plantations (MASDAR 2011). However, the intricacies of land tenure and access arrangements, with the long drawn-out litigations, often present investors with substantial challenges (Amanor, Yaro and Teye 2020; Yaro, Teye and Torvikey 2018).

The industrial-use sector grapples with unreliable supply of FFBs, because the estate plantations do not produce enough FFBs for their mills and must, thus, compete with the market for home-consumption. To meet the shortfall, the estates enter into different arrangements with smallholders to supply them with FFBs. Nucleus smallholder and outgrower schemes are examples of these arrangements. But contract violations, including side-selling, is rampant among smallholders (Dzanku et al. 2020; Takyiakwaa et al. 2021). The situation is so bad that some estates, like BOPP, avoid contracts altogether, even to farmers under their outgrower schemes, because such contracts are no guarantee against side-selling.⁸ On their part, smallholders greatly distrust contracts, even though studies have shown that farmers under contract are better off than their counterparts cultivating independently (Ruml and Qaim 2020).

Other problems include the flooding of the market with cheap imported vegetable oils. The inability of industry stakeholders such as OPDAG to get government to address this issue in spite of the government's own stated policy of protecting the sector point to the importance of political economy considerations. For instance, government is unwilling to use tariffs to protect the domestic palm oil industry because of the political influence of importers of edible oils.⁹ The next section closely examines successive government interventions and why they have failed to improve the performance of the sector.

7. Structural contexts of efforts to revive Ghana's oil palm sector

7.1. Political and economic instability

Ghana attained independence in 1957 as a net importer of palm oil which used to be the mainstay of the economy. The newly independent government of Kwame Nkrumah embarked on an aggressive agenda to revive the oil palm economy as part of a broader strategy of import substitution (Gyasi 1992). In 1964, OPRI was established to, among other things, conduct scientific research into oil palm development and to supply improved seedlings to cultivators.¹⁰ Efforts to promote the oil palm industry were streamlined into broader national development plans and strategy documents by post-independence governments. These included the five-year development plan (1959–1964), the seven-year plan (1964–70), the two-year plan (1969–71), the five-year plan (1975–1980), the Structural Adjustment Programme (1982–1992), Vision 2020, and the Ghana Poverty Reduction Strategy I and II. These efforts have been geared towards expanding production and processing capacities; poverty reduction and employment creation; reducing the overreliance on cocoa, gold, and timber as foreign exchange earners; and economic transformation by attracting large capital investment into the oil palm sector (MASDAR 2011: 1.2).

However, the actual implementation of oil palm industry-specific policies was shaped by ideological, strategic, and factional considerations. The statist approach of the Nkrumah government stood out starkly against the hands-off approach adopted by the colonial regime for most of its tenure. And while the colonial regime was mainly interested in enhancing the export revenue generated by the industry, Nkrumah's government followed an import substitution strategy aimed at satisfying domestic household consumption as well as industrial needs. In pursuit of these goals, the State Farms Corporation and independent producers were supported to increase the area under cultivation. In 1962, the State Farms owned only one of five small mills, but by 1987, this has increased to four state-operated estates in Prestea, Sese, Kwamoso, and Asesewa (MASDAR 2011: 1.3).

After Nkrumah's overthrow in 1966, economic policy became erratic, swinging between protectionism and outward orientation. The market-oriented government of Kofi Busia (1969–1972) kept the state-owned enterprises formed under the Nkrumah government, but pivoted from import substitution to production for export. During this period, the State Farms Corporation established new plantations and expanded processing capacity. Under the next regime, General Acheampong reversed Busia's market orientation under the Five-Year Development Plan (1975–1980), which resulted in the establishment of three large estates, namely Benso Oil Palm Plantations Limited (BOPP), Ghana Oil Palm Development Corporation (GOPDC), and TOPP (MASDAR 2011).

A combination of political and economic crises in the late 1970s resulted in the dramatic rise of a young Flt Lt Jerry John Rawlings, who by 1981 had successfully carried out two coups d'état. Although initially espousing a strong Marxist ideology, a combination of deep economic crisis, severe drought, and the sudden deportation of about a million Ghanaians from Nigeria forced him to adopt market liberalisation policies as a precondition for aid from the IMF and World Bank (Boafo-Arthur 1999). The oil palm industry received a boost under the liberalised economy. The 1990s witnessed an aggressive drive to divest government interests in oil palm production, so that by 2007, government had privatised nearly all the State Farms plantations, including GOPDC, BOPP, TOPP, and NOPL (Appiah-Kubi 2001).

In spite of these reforms, the industry was still unable to satisfy domestic demand by the turn of the twenty-first century. The active interest of post-independence governments in promoting the oil palm industry notwithstanding, the broad policy environment was marked by

⁶ Interview with officials of Proforest, March 2020.

⁷ Interview with official of Solidaridad, March 2020.

⁸ Interview with manager at BOPP, March 2019.

⁹ Separate interviews with executives of OPDAG and of Artisanal Palm Oil, March 2020.

¹⁰ Interview with officials of OPRI, March 2020.

political instability. Between 1966, when the Nkrumah government was overthrown, and 1980, when the Hilla Limann government was toppled, the military had overthrown five governments, three of them democratically elected. And it was not until 2001 that the country experienced its first transition of power from one democratically elected government to another. These frequent abrupt changes of government affected the implementation of broad development plans, including specific policies targeting the oil palm sector.

In addition to political instability, policy implementation was also hampered by weakened state capacity resulting from factional politics and the use of state agencies as a vehicle to reward political supporters. The resulting corruption and mismanagement undermined efforts to promote the value chain (Gyasi 1992). Together with the ever-present problem of inadequate financial resources, which only grew worse in the 1970s, these factors effectively frustrated Ghana's efforts to produce enough palm oil to meet the domestic demand. Thus, the shift towards privatisation in the industry was embraced by stakeholders, with the expectation that by ceding space to the private sector, the industry would finally enter a phase of rapid growth.

7.2. Donor influence and private sector participation

Following the economic crisis of the late 1970s and early 1980s, Ghana undertook thoroughgoing economic reforms under the direction of the Bretton Woods institutions. The military regime in the 1980s had a relatively freer hand in the pursuit of macroeconomic reforms, but the inauguration of the Fourth Republic in January 1993 radically shortened the time-horizon of the Rawlings regime (Whitfield, 2011a) and increased the number of actors vying for rent by opening up the political arena to erstwhile excluded actors (Boafo-Arthur 1999; Resnick 2019). Although the democratic transition was widely expected to usher in a new era of politics and development, it has widely failed to meet these expectations. On the contrary, it has reinforced patronage politics under the pressure of electoral calculations. The result is a political settlement which scholars describe as 'competitive clientelism', in which elections are meaningful because they routinely lead to peaceful transitions but have little impact on the deeply entrenched system of patronage, extractive corruption, or the politics of impunity (Whitfield, 2011a; Appiah and Abdulai 2017; Asante and Khisa 2019).

Even though democratisation increased the range of actors in the political arena, they are not all equally successful in influencing policy. In fact, a paradoxical situation emerged: even though the logic of economic liberalisation mandated an active role of the private sector in the economy, government-business relations remained frosty throughout the Rawling era spanning the Provisional National Defence Council (PNDC) (1981–1992) and the National Democratic Congress (NDC) (1993–2000) governments. This hostility derived from the strongly Marxist bent of the early PNDC regime, but the government also harboured suspicions that private wealth could be used to finance opposition of the government (Tangri 1992; Whitfield, 2011a). On the other hand, the imperative to win elections strengthened both horizontal factions of political parties – who could mobilise monetary and other resources to sponsor electoral campaigns – and lower-level factions (Khan 2005). The pressures of this competitive-clientelist logic were so strong that in spite of the New Patriotic Party's (NPP) market-leaning ideology, organised business interests did not fare any better under the Kufuor government (2001–2008) than they did under Rawlings (Whitfield, 2011b).

Agricultural policies since 2001 have borne the fingerprint of international development agencies and are designed to coincide with the prevailing development narratives. In response to the priorities of programmes overseen by donors such as the Foreign, Commonwealth and Development Office (FCDO), International Fund for Agricultural Development (IFAD), GIZ, the World Bank, and United States Agency for International Development (USAID), agricultural policies have been designed to address issues of food security, rural poverty, provision of

infrastructure, as well as input subsidy and marketing support. The ideological basis for these programmes strongly favoured a public–private partnerships strategy. The fact that these programmes coincided with electoral calculation partly explains why they have remained constant elements of the agricultural policies of both NPP and NDC governments (Teye and Torvikey 2018: 18–19).

Thus, in spite of the aggressive reduction of the role of the state in the economy that occurred in the 1980s under structural adjustment, the 1990s witnessed new forms of state interventionism involving massive capital investment. Many of these policies had explicit poverty reduction and rural development objectives. For instance, the goals of the Medium-Term Agricultural Development Programme (1991–2000) included crop productivity as well as developing marketing systems and rural infrastructural development. From 2001, policies have sought to, among other things, supply raw materials for domestic industrialisation or promote commodity chains of selected export crops (FASDEP I and II 2002; Tree Crop Strategy 2012), supply inputs like improved seeds or fertilisers (National Fertiliser and Seed Policies 2010), promote food security and poverty reduction (FASDEP I and II; Medium Term Agricultural Sector Investment Plan [METASIP I and II] 2011–2015), and encouraging private sector participation (GCAP 2012; Teye and Torvikey 2018: 19–20).

7.3. Oil palm sector development under competitive clientelism

In the past two decades, oil palm policies have been motivated by easing the constraints on the country's foreign exchange reserves by reducing the import bill, as well as capturing the Economic Community of West African States (ECOWAS) market, where unmet demand in 2004 was estimated at 850,000mt (Toledano et al. 2004, cited in Opoku and Asante 2008). In 2003, when the President's Special Initiative in Oil Palm (PSI-Oil Palm) was launched under President Kufuor, there was optimism about its potential for success given the fact that it was under the direct oversight of the country's most powerful political office.

The aim of the PSI-Oil Palm was to expand production to meet the domestic and sub-regional demand. To meet this objective, the government was to support OPRI to expand its capacity for producing agro-inputs. To expand the area under cultivation, groups of farmers were to be organised to cultivate 5000 ha plantations with a 20 t FFB/h mill established on-site with the help of the private sector. The ultimate aim of the initiative was to bring 200,000 ha under cultivation (Opoku and Asante 2008: 18; Adjei-Nsiah, Sakyi-Dawson and Kuyper 2012). As part of the initiative, the government devised a corporate village enterprise (COVE) model under which smallholders would control majority shares in processing mills linked to the PSI-Oil Palm farms but whose day-to-day administration was under professional management. The PSI-Oil Palm was able to add about 20,000 ha of oil palm to the national stock (MASDAR 2011), just ten percent of its intended target.

This model did not take off because of the heavy smallholder leaning of the PSI, and the dissatisfaction of private sector actors over the programme's design and priorities. Instead of the COVE model, estates had wanted the PSI-Oil Palm to strengthen the connection between independent smallholders and company mills (Asante 2012). This tension was inevitable because the bifurcated nature of the value chain made it almost impossible to satisfy both sectors using the same policy. This was further complicated by the fact the policy was meant to satisfy two incompatible goals: 1) reducing the import bill by boosting local production of edible oils, a policy which required that government prioritises the industrial processing stream of the value chain; and 2) reducing rural poverty by boosting smallholder production, which the COVE model sought to attain by empowering smallholders to produce and process their fruits on a large-scale, which required the programme to prioritise the needs of the home-consumption segment of the value chain. In the end, the estates withdrew from the programme over these disagreements. The fact that the PSI-Oil Palm eventually collapsed without the support of the estates (Asante 2012) demonstrates the

holding power that these estates wielded in terms of policies affecting how the chain operates.

The PSI-Oil Palm was also severely affected by inter-agency coordination issues and factional struggles within NPP. The programme was very closely identified with Alan Kyeremanteng, who was widely considered “the political power behind the PSIs programme” (Asante 2012: 25). When he became the Minister for Trade and Industry, the programme was moved to his ministry. Later, it was moved to the Ministry for Private Sector Development, briefly under the supervision of Kwamena Bartels, and then back to Kyeremanteng’s ministry. The programme was so strongly associated with Kyeremanteng that other government agencies who were supposed to support it were either hesitant or, like MoFA, “they hardly embraced the programme because the Ministry had not been [officially] invited to participate in PSIs” (Asante 2012: 28).

When the NDC came back to power in 2009, MoFA commissioned a master plan for the development of the oil palm sector. The report, prepared by MASDAR, proposed seven different projects with a detailed implementation plan between 2012 and 2025, including establishment of 10,000 ha nucleus estate and 60tph mill plantation company; 40,000 ha smallholders development scheme, including a smallholder services entity and a road maintenance fund; village level replanting programme (110,000 ha); small-scale mills transformation programme; industrial palm oil-based manufacturing projects; support services and industries; and basic supportive infrastructure (MASDAR, 2011: 7.1–2).

However, this plan was not implemented. A high-ranking MoFA official explained that funding limitations were a major factor in the plan’s failure to materialise.¹¹ However, other respondents attributed the non-implementation to the tendency for certain policy interventions to become too closely identified with the minister or politician who initiated them. However, other respondents believed that certain policies often become closely associated with the minister or politician who initiated them, making it difficult for successors to continue them after they leave office.¹²

The most recent intervention is the passage of the Tree Crop Development Act in December 2019, which is expected to substantially improve the performance of the sector (GoG 2020). The act established the Tree Crop Development Authority (TCDA), which will be the governing body for the country’s tree crops sub-sector. Stakeholders in the oil palm value chain had lobbied for years for a national regulatory body of this sort, but the government decided to create a four-crop authority instead.¹³ It will take a few years before the impact of the authority on the productivity of the sector can be adequately assessed.

8. Summary and conclusion

Oil palm, which has been one of the most important cash crops in Ghana since independence, has continued to underperform in spite of the sustained policy attention devoted to it. To explain this paradoxical outcome, this paper has shown how attempts to develop the oil palm value chain have been constrained by political economy factors and the competitive clientelist political settlement that shapes the way policies are formulated and implemented in the country since the return to constitutional rule. Because of their weak position in the country’s political settlement, the industrial segment of the value chain continues to be neglected in resource allocation in spite of the government’s own professed commitment to industry-led economic growth.

The analysis in this paper has shown that several factors have hindered the oil palm industry from realising its full potential. The first

challenge is the existence of two separate segments in the value chain, each with its own internal organisation. However, actors from these segments sometimes overlap, resulting in frictions that adversely affect productivity in both segments. For example, to supplement their plantation output, estate mills procure FFBs from smallholder farmers cultivating independently or under contract. However, conflicts often arise because smallholders are often reluctant to adhere to the stringent cultivation standards set by industrial mills, while price fluctuations on the global market lead to tensions between smallholders and estates when the local price for FFBs is reduced in response to market developments. Recent policies have not effectively addressed the segmented nature of the value chain, even though the success of policies targeting the sector is dependent on the cooperation of both segments, as evidenced by the PSI-Oil Palm.

Government intervention in the sector between the attainment of independence and the advent of the SAP was negatively affected by the frequent political disruptions that occurred between 1966 and 1981. The climate of political instability impeded the ability of successive governments to coherently pursue a long-term strategy to develop the sector. These frequent abrupt changes of government affected the implementation of broad development plans, including specific policies targeting the oil palm sector. However, the return to electoral politics under the Fourth Republic has not necessarily improved policymaking and implementation in the sector. Instead, multiparty politics has led to the emergence of a unique form of competitive clientelism characterised by a rhetorical commitment to poverty reduction and economic transformation and the logic of electoral competition which predisposes government officials to focus on short-term political calculations. The focus on poverty reduction has motivated the policy strategy of targeting smallholders with subsidised inputs like fertiliser and seedlings. However, poor supporting infrastructure, weak marketing systems, and inadequate industry-wide integration continue to frustrate the ability of such initiatives to contribute to the stated goals of poverty reduction or rural economic transformation. At the same time, political leaders prefer the distribution of targeted goods to smallholders because of its potential electoral payoffs. Consequently, it is extremely difficult to end such programmes even when they fail to yield the desired outcomes.

Within this political context, policymakers are reluctant to make necessary but difficult decisions regarding the oil palm sector, and even when decisions are made, they are not always adhered to. As a result, policies aimed at promoting growth of the value chain have failed to eliminate longstanding structural obstacles to productivity. As a result, after a century and a half of more or less sustained policy support, the sector’s productivity remains at the level it would have been if it had been left to operate without any kind of state assistance. Without addressing these broader structural forces that incentivise short-term regime survival needs over long-term economic transformation goals, the problems besetting the oil palm industry is likely to persist.

CRedit authorship contribution statement

Kofi Takyi Asante: Conceptualization, Data curation, Formal analysis, Funding acquisition, Investigation, Methodology, Project administration.

Declaration of Competing Interest

The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

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¹¹ Interview with official of Tree Crop Services Directorate of MoFA, March 2020.

¹² Interview with officials at MoFA, March 2020.

¹³ Separate interviews with executive of OPDAG, and with officials of Solidarity and of Proforest, March 2020.

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