
Shifting from tobacco growing to alternatives in Malawi? A qualitative analysis of policy and perspectives

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Abstract

Tobacco is the primary export commodity in Malawi and an important contributor to foreign earnings. The entrenchment of tobacco interests within government has partly explained why Malawi has lagged in its efforts to address the health consequences of tobacco and has been a vocal opponent of global tobacco control. Despite the extensive historical and entrenched relationship between the economy of Malawi and tobacco production, there have been important shifts at the highest policy levels towards the need to explore diversification in the agricultural sector. There is explicit recognition that alternatives to tobacco production must be pursued. This study provides an analysis of the policies and perspectives that characterize contemporary government approaches to tobacco and alternatives in Malawi by interviewing key government officials working on tobacco policy and reviewing recent policy documents. This research finds that there is openness and movement towards reducing tobacco growing in Malawi, including efforts to reduce tobacco dependency. Rather than a singular tobacco policy discourse in the country, there is a somewhat conflictual set of policies and perspectives on the future of tobacco in Malawi. Informing these policies and perspectives is the interplay between the economics of agricultural production (tobacco vs other crops), global markets (ranging from the ability to generate export earnings to the inability to compete with wealthier countries' non-tobacco crop subsidies) and the lack of developed supply and value chains other than those created by the transnational tobacco industry. The implications for government policy supporting a move away from tobacco dependence are not straightforward: there is a need to fill the supply chain gap for alternative crops, which requires not only strong intersectoral support within the country (and some challenge to the residual pro-tobacco narratives) but also international support.

Keywords: Institutions, agriculture, tobacco, tobacco control, Malawi

Key Messages

- Tobacco remains a key agricultural commodity in the minds of policymakers despite problems faced by tobacco growers.
- There is an emerging policy shift that emphasizes the need to pursue alternatives to tobacco production in Malawi.
- There remain numerous challenges to the pursuit of alternatives to tobacco production both domestically and globally.
- Tobacco-control proponents must work with other sectors of government to foster alternatives.

Introduction

Malawi is one of the top tobacco-growing countries in Africa and, relative to its size, one of the largest producers in the world. The entrenchment of tobacco production has deepened over the past century and has been fostered by the establishment of government agencies specifically charged with supporting tobacco growing and marketing (Prowse, 2013). Raw tobacco accounted for 52% of Malawi's export earnings and 10.2% of the country's gross domestic product (GDP) in 2017, the last year with accurate reporting. To illustrate the continued expansion of tobacco production, the country has seen an increase from 23 000 tonnes in the 1960s to >160 000 tonnes in the 2000s (FAO, 2018). The late-1980s brought the liberalization of the tobacco supply chain (Prowse, 2013). Historically, tobacco production was dominated by large estate farms with insignificant amounts coming from smallholder farming. However, currently smallholder farmers account for 95% of the total production with the remaining 5% being derived from estates (National Agriculture Policy, 2016). Tobacco companies have largely taken over from government in the management of the supply chain (Moyer-Lee and Prowse, 2015) and tobacco company influence in public institutions remains omnipresent (Otañez *et al.*, 2007; Smith and Lee, 2018).

Given the reliance on tobacco production, it is not surprising that Malawi has been a vocal opponent of global tobacco control. Government representatives have voiced their opposition to tobacco control at international venues such as in World Trade Organization committees, arguing that demand reduction measures such as standardized packaging or elimination of flavouring in tobacco products will have detrimental impacts on the economic livelihoods of Malawian tobacco farmers and broader economic development (Otañez *et al.*, 2009; Lencucha *et al.*, 2016a; Kulik *et al.*, 2017). Malawi remains one of the few countries that has not ratified the Framework Convention on Tobacco Control (FCTC), an international treaty that establishes minimum and aspirational standards for country-level tobacco-control measures, including an explicit aim of reducing tobacco supply. Recent work by Smith and Lee (2018) and ongoing research by Prowse (2011, 2013) and Prowse and Grassin (2020) provides crucial insights into how the political economy and institutional environment of Malawi has served to embed tobacco as a key economic commodity within the country. Institutions like Malawi's Tobacco Control Commission have an explicit mandate to support tobacco production, and the historical entrenchment of a pro-tobacco institutional environment makes it difficult for government to support alternative means of economic activity. From this perspective, although sectors of the government have been anti-tobacco control, it is important to acknowledge that these sectors inherit a long-standing legacy that has positioned tobacco as a mainstay of the Malawian economy. The dominance of tobacco production as an economic development strategy has posed perennial challenges for those advocating for strategies to reduce demand for and supply of tobacco (Davies, 2003). The research to

date has suggested that there is little appetite within the economic sector to reduce tobacco production (Kulik *et al.*, 2017; Prowse and Grassin, 2020).

However, our research suggests that we are seeing both shifts in policy that advance an agenda towards diversifying agricultural production away from tobacco, and recognition by individuals within institutions that have historically supported tobacco production that tobacco is not a viable or sustainable economic commodity. For example, there is recent emphasis within government on economic diversification, particularly in the agricultural sector (National Agriculture Policy, 2016). The National Agriculture Policy (2016) advocates for the movement of farming households into non-traditional, high-value agricultural value chains and increased engagement in profitable off-farm and non-agricultural livelihoods. The Malawian Growth and Development Strategy (MGDS) III (Malawi, 2017), in turn, emphasizes the importance of establishing new markets for agricultural commodities, especially oilseeds, sugarcane, livestock, animal feed and fisheries products, including agro-processing and value addition in these commodities. In line with the MGDS III, the National Agricultural Investment Plan identifies sugarcane, cotton, coffee, tea, macadamia nuts, soybeans, oilseeds and chillies as some alternatives to tobacco. The Malawi Investment Forum has registered an increase in public-private agriculture and agro-processing projects in bean processing, fisheries, rice, cotton and dairy among other agricultural commodities (Otañez *et al.*, 2009). Despite not having ratified the FCTC, these efforts align with Article 17 of the Convention which calls on Parties to provide 'support for economically viable alternative activities for tobacco workers, growers and, as the case may be, individual sellers' (WHO, 2003).

These developments in key policy documents are important for health advocates to be aware of, in significant part to avoid a tendency to create a pariah out of Malawi, which risks alienating the government and particularly its efforts to pursue alternatives to tobacco. Tobacco remains entrenched in the country's economy, and Malawi still defends tobacco production and the livelihoods of tobacco farmers in different international arenas (Otañez *et al.*, 2009; Lencucha *et al.*, 2016a; Kulik *et al.*, 2017). It is thus important to understand the institutional landscape, and why certain agencies within and outside of government remain more or less pro-tobacco, to generate new lines of inquiry that can disentangle the pathways that support tobacco production and the pathways and mechanisms that can support alternatives.

In pursuing this aim, we analyse the policies and perspectives that characterize current approaches to tobacco and alternatives in Malawi. Through this analysis, we illustrate the ways in which tobacco continues to be supported, while also providing perspectives supportive of alternatives. While there is openness to alternatives to tobacco production reflected at the highest level of policy, the idea of tobacco as an important economic commodity remains deeply embedded in the government approach to economic development.

However, we highlight the numerous structural barriers that impede the aspiration expressed by many individuals, and reflected in high-level planning documents, to move away from the current overreliance on tobacco.

Methods

This research is part of a larger project examining the political economy of tobacco production and control in Kenya, Malawi, Zambia and Indonesia. One prominent aspect of this work is to better understand the political economy of tobacco production, namely the policies and processes that facilitate tobacco production or provide opportunities for alternatives. This article presents analysis of the most recent round of key informant interviews in Malawi. We sought to gain insights into the current state of tobacco policy in Malawi through perspectives of decision-makers and others involved in the governance of tobacco supply on the future of tobacco production in light of recent policy shifts that emphasize diversification away from a reliance on tobacco. This qualitative descriptive study involved semi-structured interviews with individuals working in the country's tobacco sector—both economic and health related—as well as others with experience in closely related agricultural sub-sectors (e.g. farmers associations). We have chosen to use general categories to represent the sectors in which participants are involved to protect anonymity (see Table 1 for list of participants and interview information).

Three investigators (R.L., T.M. and D.M.), two of whom are local researchers based in Lilongwe, conducted face-to-face, semi-structured interviews with representatives from the Agricultural and Agribusiness Sector ($n=4$); Economic Sector ($n=2$); Health Sector ($n=1$); and Farmers Associations ($n=2$). All three investigators attended each interview, independently took notes during the interview and compared these notes following each interview. Based on our several years of past research work in Malawi and knowledge of the political economy of tobacco farming and production in that country, we purposefully selected individuals who held positions involved in tobacco production. The sample size was based on the specificity of the information sought and the narrow pool of potential interviewees that results from the specific interest in one agricultural commodity and the institutions and organizations working on this specific commodity (Malterud *et al.*, 2016). The key criteria for the selection of representatives from the chosen agencies and organizations were their involvement in policies and programmes on tobacco supply chain management and/or Malawian smallholder tobacco-farming practices. All of the agencies and organizations that we selected for recruitment agreed to participate in the study. That we were able to interview the key government agencies and non-governmental organizations involved in tobacco supply ensures

that a diversity of perspectives is provided. For example, it is likely that representatives from technical research support agencies will have a unique perspective on tobacco supply than those working in the agribusiness sector of government that may represent the interests of industry or a farmers' association that represent the interests of growers. This diversity of representation allows for the identification of different as well as similar perspectives on the research question. The interviewees were provided with information about the study prior to the interview via email. Participants were informed about the context of the study and how the data were to be used. Interviews were conducted over a 1-week period in June 2018. Each participant provided consent to be interviewed, and all but two participants agreed to be audio-recorded. For the interview that was not audio-recorded, notes were taken by the three investigators. Notes were compared and discussed following the interview. Interview notes and transcripts were anonymized and de-identified. On average, each interview lasted 40 min with a range of 25–56 min.

All interviews were transcribed verbatim and analysed using thematic analysis. The transcripts were analysed by two investigators independently. The inductive analysis process was structured by the overarching research question. This involved reviewing the transcripts and grouping and naming 'chunks' of data (coding) according to the overarching research question. The codes were then grouped into themes and sub-themes that represented key findings pertaining to the challenges and opportunities to reducing tobacco production. The two investigators (R.L. and T.M.) discussed the analysis to reach agreement on the interpretation of the data and the overarching narrative that was to be presented in the manuscript. The final analysis was reviewed by the co-authors who agreed on the interpretation. The study protocol received ethics approval by the Institutional Review Boards of [Institutions].

Results

We organize our analysis into four intersecting themes. These themes weave together a story told by those working on issues pertaining to tobacco supply. The story is at times contradictory but reflects the way that those working on policy and programmes pertaining to tobacco at once express the desire to find alternatives to tobacco production, while also justifying ongoing tobacco production. The themes reflect the tensions that exist when existing structures do not align with future aspirations and when the economic expectations tied to tobacco do not align with ongoing economic challenges. The first theme reflects the orientation and entrenchment of economic logics that position production as an outcome of consumer demand. The second theme reflects the expressed discontent with the economics of tobacco production, which adds a different

Table 1 List of participants

| Participant # | Sector ^a | Category | Length of interview (min) |
|---------------|---------------------|------------------|---------------------------|
| 1 | Agriculture | Parastatal | 48 |
| 2 and 3 | Agriculture | Government | 80 |
| 4 | Economic | Government | 25 |
| 5 | Economic | Government | 30 |
| 6 | Health | Government | 37 |
| 7 | Farmers association | Non-governmental | 56 |
| 8 | Farmers association | Non-governmental | 30 |
| 9 | Agriculture | Parastatal | 51 |

^aAgencies are categorized by sector to ensure anonymity.

perspective on the viability of tobacco as an economic commodity. The third theme highlights the expressed desire and efforts to move away from tobacco production, and the last theme presents findings on the challenge of this pursuit.

Justifying production: tobacco as an economic commodity

We found three major justifications employed by those in the economic and agricultural sectors of government in favour of sustained tobacco production. The first two arguments externalize the drivers of tobacco production and risks of tobacco consumption. The first argument points to demand as a driver of production, and the second invokes a nationalistic morality that argues that, since most Malawians do not consume tobacco, its production is justified as an economic export commodity. The third argument points to the relative economic viability of tobacco in relation to other agricultural commodities.

All about demand

The first argument is based on the international demand for tobacco leaf. One participant pointed to large-scale manufacturing and distribution in countries around the world, suggesting that the demand for Malawi's tobacco leaf propels production:

I think tobacco will still be there, the western countries may say they are not buying but America is still producing. If America is still producing, then all of us will continue to produce, this is also true for China ... If these countries decide to stop then maybe that's when we can stop (Participant 1).

Underpinning this justification is a perspective on the relationship between government and market that views the market as the driver of market activities, where government, at most, is a facilitator of this dynamic between supply and demand. The demand-driven logic is exemplified by one government official who notes:

There is still a market and so there is no reason why we should stop growing tobacco. We will stop when the market will be closed but as for now, there is still a market and so we will still produce (Participant 8).

To punctuate this point, another participant stated emphatically that

until the last smoker dies, Malawi shall continue growing tobacco, that's the bottom line (Participant 1).

These statements reflect an underlying assumption that consumer choice ultimately drives supply, which in turn excuses government from responsibility on the 'good' of this product supply (Hamann, 2009; Crouch, 2012).

No consumption here

Despite this positioning of demand as the driver and government the passenger in tobacco supply, another justification expresses ethical undertones linked to a nationalistic perspective on government responsibility. This ethical dimension is a subtle reference to concerns over the health of Malawi's citizens, while at the same time pointing out that as an export commodity, tobacco remains an economic and not a health issue. This is stated clearly by one participant:

Now when you look at Malawi, tobacco is more of an economic issue than a health issue because we are a nonsmoking country and tobacco brings in more money to the country. ... Because we are a nonsmoking country so 99.9% of the tobacco gets exported (Participant 9).

Another participant expressed this bluntly, ...

As Malawians we don't smoke so if the smoking countries are saying produce tobacco, we will do that, as long as we make our money (Participant 8).

There are two ways to analyse these statements. First is for their veracity. Evidence suggests that Malawians do indeed consume tobacco. One participant from the health sector noted that

[A]ccording to the 2009 STEP survey ... 21% of adult Malawians are smokers (Participant 6).

Other sources estimate that daily consumption among adult males in Malawi may be slightly less, hovering ~17% (Drope and Schluger, 2018) or 16.5% for males and 2% for females according to the 2017 STEP survey (WHO, 2019). In these cases, consumption is much higher than indicated by participants. Another way to analyse this justification is to examine what this means about the way government officials see their role in relation to tobacco supply: i.e. that economic goals are justified if these goals do not harm the health of the country's own citizens. From this perspective, there is a moral calculus being employed by government officials, which is contrary to ways tobacco-promoting policy is often characterized by the public health community as immoral or at best amoral.

Relative economic viability

The third justification relates to the economic viability of tobacco relative to other cash crops. There was a general perception among participants that there were no profitable alternatives to tobacco. For instance, participants from the agricultural research sector noted that tobacco will continue to be grown

until such a time that we are able to say that this is an alternative crop for tobacco and farmers are able to get the same profits (Participant 1).

He further uses the metaphor of 'stuck' in reference to the situation of tobacco farmers:

You can go through the entire spectrum of crops that are grown in Malawi and you compare how much farmers get from the sales you will see that farmers are stuck with tobacco (Participant 1).

Rather than tobacco being viewed as essential to the economy or to farmers' livelihoods, it is placed alongside other possible alternatives and appears to be viewed in strict economic terms. One participant expressed this orientation explicitly:

... there is not any crop in Malawi more profitable [than] tobacco, otherwise we would have seen more farmers switching to that other crop (Participant 9).

Such statements, however, require interrogation. This last statement implies that farmers act on perfect information about alternatives when making decisions and that both tobacco and other crops are not shaped by government intervention or industry influence,

simply market demand. Contrary to this assertion, we know that market access, access to credit, transportation to market, subsidization of inputs and other factors shape the decision to grow tobacco and/or other crops (Appau *et al.*, 2019a,b). For example, Dorward and Chirwa (2011) found that Malawi's input subsidization programme, which involved subsidized seed and fertilizer, led to increases in maize production (which is mainly grown for local consumption), poverty reduction and economic growth, illustrating that governments can impact agricultural production and wider economic indicators.

An imperfect economic commodity

Despite the assertion that tobacco is the most lucrative agricultural commodity, some participants also recognized that farmers growing tobacco experience only limited benefits. The participants that worked more closely with farmers or were not involved directly in government policy on tobacco production were often the ones highlighting its challenges. One participant from a farmers' association noted:

Well, I think if you go to the rural districts that have a lot of tobacco producers, you find poverty is remaining. ... you don't really see livelihoods improving (Participant 7).

In a related dynamic—the macroeconomic rather than the microeconomic (farm-level) perspective, a government official from the economic sector highlighted that tobacco, despite being the main foreign exchange (forex) earner, whereby tobacco is purchased by companies based in countries with stronger currency thus allowing for an inflow of such currency into Malawi's economy, was nonetheless limited in its ability to contribute to the wider economy of Malawi:

If you look at the current forex that we earn from tobacco, it could be about 300–500 million dollars. That would just be enough to cover our fuel need. We haven't talked about our other needs e.g. medicine etc. So if you aggregate all the money we get from tobacco, it does not cover for our needs ... it is not enough (Participant 5).

These observations provide a more nuanced narrative of the place of tobacco in the Malawian economy. It is clear that tobacco is viewed as an important contributor to the livelihoods of farmers and the wider economy of the country. However, the benefits of these contributions are limited, at both the household (micro) and national (macro) levels.

One perennial issue for smallholder farmers growing tobacco is the low prices they receive for their leaf at auction, where farmers have limited power to negotiate price:

If you look at the negotiation power of the smallholder farmers, it is very limited. If a buyer wants to buy tobacco, farmers may not even know what the selling price should be (Participant 9).

A representative from one of the key institutions supporting tobacco production acknowledged that the pricing system can be easily manipulated by the leaf-buying companies:

For example, this year we had a big demand but low supply and from an economics point of view, the prices were supposed to be higher. But this is not what has happened; actually the prices are lower [this year] than last year. The funny thing is that the minimum price is discussed on an open forum and the buyers are

present during this discussion. They are also aware of the markup price. So the buyer knows that the farmer has 20% as markup. They are then able to lower the prices to the expense of the farmer. This has to give question marks to our pricing systems and the pricing models that are applicable (Participant 1).

The government has been attempting to manage the price for tobacco leaf, but the grading system makes it difficult to determine whether poor-quality leaf is receiving a fair price or high-quality leaf is receiving an unfairly low price. However, one government official emphasized that they continued to make efforts to address unfair prices recognizing that farmers have limited bargaining power:

[We] decided to come up with minimum prices. The idea is to bargain for these smallholder farmers that do not have the capacity to negotiate with the buyers the ideal selling price (Participant 9).

The challenge of farmer livelihoods and the benefits of tobacco to the wider economy is contextualized by the broader consensus across participants that, to move out of tobacco production, there need to be viable alternatives. Interestingly, the discussion of alternatives brought out the recognition by those who were justifying tobacco production that tobacco was not a sustainable crop and that they were actively pursuing alternatives.

Engaging alternatives

A common sentiment expressed by participants was that, if there were alternatives to tobacco, there would be no opposition to pursuing them by the government. One participant deferred to the World Health Organization to present alternatives,

If WHO comes forward with an alternative crop, it will help (Participant 9).

Other participants emphasized the need to actively explore alternatives. One government official from finance noted:

We need to look at alternative crops that at the end of the day make profit. The problem with tree crops is that they take a long time before you start to enjoy their benefits. Tobacco on the other hand, if you grow it in September, your return will be accessed in no time. We need to grow crops that will trigger economic activities from where at the end of the day, we can collect some tax from (Participant 5).

Others noted that some 'progressive' farmers were already switching from tobacco to alternatives:

And we have seen a lot of tobacco farmers that are really more progressive on looking for other crops. They are looking at soybean for income (Participant 7).

Participants also expressed optimism for alternative crops in Malawi. The thread running through these sentiments was that, if the government invested in other crops, there were possibilities for viable alternatives. One participant from the finance sector drew from his own experience as a part time farmer and emphasized that

there are other crops, for example, Macadamia nuts, that if we can invest in them in terms of land, we can yield far much more than we are currently doing now (Participant 5).

One of the participants whose role it is to protect the interests of farmers across different crops highlighted that:

Some factories and estates give out loans to their farmers in order to promote production. This is very true for crops like cotton, tea, sugar etc. For soybeans, groundnuts and other legumes, we have organizations and large scale traders who have a network of small scale farmers who are provided with seeds, other inputs and extension services (Participant 7).

The same participant observed that some farmers were moving away from tobacco to explore other cash crops:

We have companies investing in all processing of agricultural commodities, such as oil processing, livestock, and many more. This has provided a pull for production at the farm level. And what we have seen is that tobacco farmers are diversifying and investing in these alternative livelihoods even though tobacco is still dominating at national level (Participant 7).

One of the participants, despite emphasizing the lack of alternatives to tobacco, noted that there already was a history of finding ways to diversify within the agricultural sector:

In 2013, in the era of President Joyce Banda, they introduced what we call the National Export Strategy recognizing that as a country we have overly relied on tobacco. Since 1929 tobacco has been our major export. This Strategy was launched so that we can relook the landscape on alternative crops and means of getting money so that we don't over-depend on one thing (Participant 1).

Barriers to alternatives in the wider political economy

Given the emphasis on finding and pursuing alternatives among some government officials, it is important to ask what it is that is getting in the way of doing so. The consistent message across all interviewees is that there are still no crops that compare to tobacco in terms of the structure of the supply chain, including access to markets, and the payment on delivery, even though the earnings are acknowledged to be low. There were two sets of barriers to alternatives expressed by participants. The first are domestic barriers and the second set linked to the structure of global markets, with an emphasis on the inability of Malawi to compete with larger subsidized agricultural markets.

Domestic barriers

One domestic barrier was the scale of land needed to ensure the viability of other crops. One participant expressed this limitation:

We have big problems of land and so if you produce legumes, they require a lot of land ... With 1 hectare of tobacco, you can produce about 1.5 tonnes [of tobacco leaf] and you can't [do] that with legumes (Participant 8).

The national development plan of Malawi recognizes the limited amount of arable land, and the implications that this has for both cash and subsistence crop production (XXXX, 2017). Another domestic barrier to switching to alternative crops is the current dominance of contractual arrangements between smallholder farmers growing tobacco and the leaf-buying companies. Government withdrawal from the provision of supports such as subsidized inputs and extension services has created a situation where tobacco companies

now provide input supports (e.g. seeds, fertilizer) on loan, extension services to support crop cultivation and transport of the harvested crop to market. In other words, the contracts serve to tie farmers more directly to leaf-buying companies and structure the continuation of tobacco production. The governance of these contracts has shifted over the years, and recent efforts have been made to ensure fairness in these contracts through government oversight (Prowse and Grassin, 2020). Participants acknowledged that there were limited markets for other crops, but the new development plan states the need to pursue a 'systematic approach to promote agro-processing, value addition and manufacturing initiatives, while enhancing ecosystem integrity' (Malawi, 2017). The fact that the national export strategy focuses so much attention on developing oil seed, sugar cane and other product value chains with the explicit aim of diversifying export beyond tobacco bode well for the pursuit of alternatives (MoIT, 2013). As Chimhowu *et al.* (2019) noted, these plans and strategies are 'part of a process of communicating and negotiating national ideals with internal and external audiences'. Participants acknowledge that despite the openness to alternatives, there are challenges inherent to pursuing export commodities in an unequal global market.

Barriers of the global market

The other set of barriers expressed by participants was in the global market. Specifically, it was noted that it was difficult for Malawi to develop export-oriented value chains for other crops given their heavy subsidization by wealthier countries:

For a Malawian farmer to compete with an American or European farmer who are heavily subsidized, it is very difficult (Participant 4).

OECD data support this perception, indicating that most high- and middle-income countries spend more on agricultural subsidies alone than the total GDP of Malawi, although agricultural subsidies are only one piece of the puzzle for agricultural commodities to be competitive in the global market. A number of participants gave illustrative examples of the challenge of competing in the global marketplace:

If Brazil and other countries produce a lot, it affects other markets. This year, 2018, soya prices are good but last year the prices were bad because Brazil was keeping a lot of soya hence increased the supply on the market. Prices for these other crops are not stable and so farmers keep producing tobacco (Participant 8).

We tell farmers to grow other cash crops but we do not show them markets. In a certain year there was surplus soya, so that government issued a ban to prevent soya from being exported because local demand was met and prices collapsed (Participant 9).

This situation is further complicated by ongoing policy prescriptions from the International Monetary Fund to reduce agricultural subsidies to preserve government revenue (Meurs *et al.*, 2019). Malawi finds itself caught with tobacco as its primary agricultural export commodity with limited resources to develop commodities that compete on the global market. In part, this situation is further entrenched by the fact that the tobacco leaf-buying companies have established such robust supply chains (Prowse, 2013; Smith and Lee, 2018; Prowse and Grassin, 2020). As one participant summarized this combination of factors:

Tobacco is a crop with a well-structured system because for these other crops there are no ready markets (Participant 9).

Ultimately, as another informant noted:

The challenge still remains that the marketing systems of all these other crops are not well established. The prices that these farmers get from all these other crops are nowhere near the prices that they get from tobacco (Participant 1).

Discussion

The story of alternatives to tobacco production in Malawi is one with many sub-plots. Our analysis finds that the pursuit of alternatives does not simply lie with (a lack of) political will or industry interference. We find that there is considerable nuance to the perspectives expressed by participants on tobacco production and alternatives. The nuance in our findings is reflected in the recognition that tobacco is considered an important economic commodity, while recognizing that the economic benefits of tobacco are only ‘relatively’ beneficial. Participants noted that the economic benefits of tobacco are limited, but so are the opportunities for alternatives. In part, the findings point to the difficulty that Malawi faces *because* of the overreliance on tobacco and the historically embedded interests in perpetuating this one crop that presents limited prospects for future economic development. Others have illustrated how the support for tobacco production is deeply entrenched in the historically constructed political economy of Malawi (Davies, 2003; Smith and Lee, 2018). Our analysis highlights the novel finding that many whose mandate is to support tobacco production recognize the need to move away from tobacco. This finding is supported by high-level policy in Malawi that explicitly targets diversification as a development strategy moving forward. Malawi’s latest National Agricultural Investment Plan houses statements such as: ‘The dominance of tobacco renders the country vulnerable to production and market risks related to the commodity, hence, diversification of production and exports has become a priority’ (National Agricultural Investment Plan, 2018). Such statements are novel developments in one of the world’s most heavily tobacco-dependent economies. This policy shift is also reflected in the latest national export strategy, which purports to provide a ‘strategic focus and direction to promote the diversification of export clusters in order to increase macroeconomic stability, widen the tax base and increase investment’ (MoIT, 2013). As noted by key informants, the government has identified oil seed products, sugar cane products and manufacturing as priority clusters. It is hoped that these clusters have the potential to complement tobacco as major export sectors (MoIT, 2013).

There is a clear need to investigate the way that norms and institutions within government are shifting and what is propelling these shifts. We see from our previous interviews with policymakers in Kenya, Malawi and Zambia, that a narrow focus on crude economic outcomes has dominated the orientation of economic sectors (Lencucha *et al.*, 2018), making it difficult to justify alternatives to tobacco production based on health or social justice (e.g. child labour issues) arguments. Our study finds that these norms still persist, but we may be seeing shifts in orientation within institutions, or at least among some of those working in these institutions. This persistent emphasis on economics may, when combined with the recognition that tobacco does not achieve the desired economic benefits that were once attributed to the commodity, support efforts of

tobacco-control advocates to work with the economic sector to pursue alternatives. It seems clear from our findings that there is a desire to find alternative agricultural commodities that are more lucrative to both farmers and the wider economy. Despite government policy shifts towards diversification, Malawi continues to face challenges in decreasing its dependence on tobacco. The institutional entrenchment and promotion of tobacco still finds prominent expression in government economic policy, with such statements as: ‘[C]onsidering tobacco is Malawi’s principal export commodity and is likely to remain so in the short to medium term, there is need to enshrine production enhancing strategies, processing, value addition and export promotion of the crop... Acknowledging the benefits of tobacco, the Government of Malawi is seeking potential investors in cigarette manufacturing’ (TCC, 2017). If successful, and based on recent experiences in neighbouring Zambia, such manufacturing is unlikely to increase employment opportunities but is likely to incentivize domestic consumption (Lencucha *et al.*, 2016b; Labonté *et al.*, 2019). Such efforts serve to further entrench tobacco in the economy of Malawi while yielding new challenges to the health of Malawians (i.e. domestic tobacco consumption) and corresponding economic consequences to an already fragile health system (i.e. from tobacco associated illnesses).

Our analysis illustrates that dependence on tobacco is also fed by challenges in finding ways to support other agricultural commodities when wealthier countries continue to heavily subsidize agricultural production. In addition to the (lack of) ability to provide subsidies to stimulate non-tobacco crop production, Malawi faces additional barriers to competition in global markets including geography and inefficiencies along the supply chain. This global market environment is made even more difficult when the government is being compelled to reduce public expenditure in the agricultural sector as a cost-cutting measure (Meurs *et al.*, 2019). At the same time, there is overt recognition that tobacco farmers are only benefiting economically due to the absence of well-structured markets for other crops. Although tobacco may still outperform other crops in Malawi, this does not support its oft-cited economic livelihood argument given empirical findings that document the often impoverished situation of many Malawian tobacco farmers (Makoka *et al.*, 2017). Although our findings illustrate that there is a need for viable alternatives if farmers are going to transition from tobacco (Appau *et al.*, 2019a,b). In combating one of the biggest challenges to reduce tobacco farming (the lack of well-developed and profitable markets for alternative crops), there is need to strategically advance the supply and value chains of non-tobacco commodities at the local and global market levels. As noted earlier, the challenges to developing alternative supply chains are multi-faceted. Domestic production of say food-based agricultural products requires an accessible market, which depends on numerous macroeconomic factors tied to global markets (e.g. subsidization regimes), local processing, manufacturing, storage and distribution capacity, as well as technical (e.g. knowledge of crop) and environmental factors. These and a host of other factors shape the ability of the government to support alternatives to tobacco production in an economic context that continues to discourage poorer countries to make investments in agricultural supply (Welch and Graham, 1999; Lencucha and Thow, 2019; Meurs *et al.*, 2019).

These macroeconomic and supply chain challenges are compounded by the legacy of institutions designed with the specific mandate to support tobacco production. The Tobacco Commission and the Agricultural Research and Extension Trust have built their operations around tobacco production and have their own embedded institutional interests in the perpetuation of tobacco as Malawi’s main

agricultural commodity. Despite efforts to demonstrate the viability of other crops such as soy and pigeon peas, there is a legacy of attachment to tobacco that warrants consideration. Shifts away from tobacco mean that, in the long-term, the structure of these institutions will not remain the same. One of the challenges is the deep and overt relationships between tobacco interests, including leaf-buying companies and associated businesses that support tobacco supply and government institutions (Smith and Lee, 2018). The enmeshment of tobacco industry in government and parastatal institutions makes it even more difficult to shift these institutions towards the support of other crops. As Smith and Lee (2018) argue, 'the political economy of the tobacco industry in Malawi over the past century has evolved towards state capture' (p. 198). It will take concerted and systematic effort to reconfigure this policy environment away from tobacco-specific agencies to agencies that support or target other agricultural commodities. There is some evidence that such efforts are underway in Malawi, but such efforts are challenged by the strongly path-dependent legacy of tobacco production ultimately promoted and sustained by the global tobacco transnational industry.

Conclusion

Malawi's tobacco dependence is often seen by tobacco-control advocates as an outlying exception, an immovable barrier to global health norms consistent with the FCTC, which the country still refuses to sign or ratify. Our research in Malawi suggests that there may be more movement in a tobacco-control direction, including efforts to reduce tobacco dependency, than its persisting pro-tobacco development policies and tobacco farmer livelihood argumentation imply. Rather than a singular perspective on tobacco in the country, there is a somewhat conflictual set of perspectives that are bound together by the economics of agricultural production (tobacco vs other crops), global markets (ranging from the ability to generate export earnings to the inability to compete with wealthier countries' non-tobacco crop subsidies and often highly efficient, cost-effective and capital-intensive production) and the lack of developed supply chains other than those created by the transnational tobacco industry. The findings suggest that, although there are efforts to embed diversification in high-level policy, there are a number of deeply challenging and long-standing issues along the agricultural supply chain: the need to fill the supply chain gap for alternative crops, which requires not only strong intersectoral support within the country (and some challenge to the residual pro-tobacco narratives) but likely international support, the need to address unfair advantages that result from agricultural subsidies by wealthy countries and the need to insert a more nuanced understanding of the economic drawbacks and gains from tobacco production.

From a tobacco-control perspective, the pursuit of alternatives to tobacco is a normative project based on a certain set of health-centric values. How these values align or misalign with the (largely economic-centric) values of those working on tobacco production is an important and novel line of inquiry (Schram, 2018; Lencucha and Thow, 2019). Our findings suggest that an economic rationale still dominates the narrative of many inside agencies that support tobacco production. In the short term, advocacy efforts can benefit from and work with the recognition inside these agencies that tobacco is not a sustainable economic activity. The recognition that farmers are not receiving the desired economic benefits from tobacco growing is now more widespread in the economic sector.

What remains is the need to establish constructive proposals to work with this sector to explore possibilities for a healthier and more economically sound agricultural supply (Lencucha *et al.*, 2020).

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