MINISTRY OF AGRICULTURE, MECHANIZATION AND IRRIGATION DEVELOPMENT

PROCEEDINGS OF THE NATIONAL AGRICULTURE STAKEHOLDERS CONFERENCE
Meikles Hotel, Harare
30 September - 1 October, 2009
The workshop was facilitated by Mandivamba Rukuni (Lead Facilitator), Mabel Munyuki-Hungwe (Co-lead Facilitator), Rudo Chitiga, Marcus Hakutangwi, Godfrey Mudimu and Joshua Nyoni.

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2. ABBREVIATIONS AND ACRONYMS

AGRITEX - Agriculture, Technical & Extension Services
AMID - Ministry of Agriculture, Mechanization & Irrigation Development
ARC - Agricultural Research Council
ARDA - Agriculture & Rural Development Authority
ASPEF - Agricultural Sector Productivity Enhancement Facility
ASTRG - Agrarian Sector Technical Review Group
BAZ - Bankers Association of Zimbabwe
CA - Communal Areas
CAADP - Comprehensive African Agricultural Development Program
CFU - Commercial Farmers Union
COFRE - Committee for On-Farm Research & Extension
COMESA - Common Market for Eastern and Southern Africa
DR&SS - Department of Research & Specialist Services
EU - European Union
FAO - Food & Agriculture Organisation
FDT - Farmers Development Trust
GAPWUZ - General Agriculture & Plantation Workers Union of Zimbabwe
GDP - Gross Domestic Product
GMB - Grain Marketing Board
MDG - Millennium Development Goal
MDTF - Multi Donor Trust Fund
MoF - Ministry of Finance
NEC - National Employment Council
NEPAD - New Partnership for Africa’s Development
NGO - Non Governmental Organisation
NRZ - National Railways of Zimbabwe
PIB - Pig Industry Board
SHCF - Small Holder Communal Farmers
TIMB - Tobacco Industry Marketing Board
TRB - Tobacco Research Board
USA - United States of America
USD - United States Dollar
WFP - World Food Program
ZCFU - Zimbabwe Commercial Farmers Union
ZESA - Zimbabwe Electricity Supply Authority
ZFDT - Zimbabwe Farmers Development Trust
<table>
<thead>
<tr>
<th>Acronym</th>
<th>Description</th>
</tr>
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<tbody>
<tr>
<td>ZFU</td>
<td>Zimbabwe Farmers’ Union</td>
</tr>
<tr>
<td>ZIMACE</td>
<td>Zimbabwe Agriculture Commodity Exchange</td>
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<tr>
<td>ZNFU</td>
<td>Zimbabwe National Farmers Union</td>
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EXECUTIVE SUMMARY

The Ministry of Agriculture, Mechanization and Irrigation Development (MoAMID) with support from the MDTF organised a stakeholders’ National Agriculture Conference (NAC) from 30 September to 1 October, 2009. The stakeholders came from government, farmers’ unions/organisations, development partners, agribusiness practitioners and the civil society. The overall goal of the conference was to review the current status of the agricultural sector and map out strategies for agricultural recovery in the short to medium term. The specific objectives of the conference were to:

- Review the status of the agricultural sector in the country
- Get stakeholder participation and input into formulating an agricultural strategy
- Provide medium term strategies necessary for the growth of agriculture

Consultants commissioned by the World Bank presented technical papers on the status of agriculture. The conference also included inputs by stakeholder groups on their state of preparedness. Group work allowed for the inclusion of inputs by the various stakeholder groups.

The Conference was conducted over 8 sessions as follows:

- Session 1: Setting context
- Session 2: Technical papers on the current status of agriculture
- Session 3: Stakeholder inputs into analysis of current status
- Session 4: Official opening: State of preparedness by service institutions
- Session 5: State of preparedness by farmers
- Session 6: State of preparedness by development partners
- Session 7: Stakeholder dialogue on recovery and growth plans
- Session 8: Close

Session 1: Setting the Context

In opening the Conference, the permanent secretary in the ministry noted that the events that had had a significant impact on agriculture in the country were viewed as land reform, de-regularization of the market and massive injection of mechanization. Despite this, the country had witnessed low production for a variety of reasons. The government announced an introduction of a $210 million input scheme for seed and fertilizer. This is complemented by the FAO Smallholder Emergency Programme. The Ministry noted its intentions to align its policies to CAADP, a project being spearheaded by NEPAD. African governments had committed to set aside 10 percent of their national budget to agriculture. A presentation then made by representatives of NEPAD on the CAADP and a representative of the MoAMID provided an update on where Zimbabwe was in the CAADP process.
Session 2: Technical papers with the current status of agriculture

Technical papers were presented on the following topics: baseline survey, household and national food security, input and output markets, and agricultural financing. The technical papers were rich in detail and had some major findings and recommendations.

Challenges facing farmers in rural areas were:

- Tenure insecurity
- Inadequate, vandalized and obsolete equipment and machinery
- Inadequate production and social infrastructure
- Irrigation infrastructure vandalized and costly
- Limited skills and knowledge of new farmers
- Limited access to inputs-labour, seed, chemicals, fertilizer, stock feeds, fuel.
- Limited/ No access to commercial loans
- Lack of information on alternative crop markets
- Electricity?

The papers identified as priority areas for the agrarian sector:

- Infrastructural provision on resettled farms
- Rehabilitating vandalized irrigation facilities
- Mechanizing the agricultural sector
- Revitalizing agricultural production

To improve and achieve household food security, the following was recommended by the paper:

- Engaging development partners including, NGOs and Civil Society groups, to leverage financial resources for the agriculture sector
- Deregulation of agricultural markets and market revival
- Reinstatement of farmer initiative instead of government led programmes
- Support to farmer organizations and building their capacity for mobilizing their members and for engaging input and output markets.
- Institutional reforms and strengthening Research and Extension

The main constraints to support of the agricultural sector were summarized as: budgetary limitations, use of obsolete machinery and equipment and the brain drain. Most training colleges had collapsed and there was a crisis in extension support. The farmer-extension ratio was 1:600. Tillage services were seen as inadequate, expensive and erratic. Also of note was the fact that the strategic grain reserve programme had not been operational for the past two years.
The challenges for financing agricultural production were noted as collateral requirement by banks, funding structure, unviable markets and breach of production and marketing contracts by farmers. On collateral requirements by banks, the paper highlighted that it was a statutory requirement that lenders request collateral. This tended to affect those farmers with little or no acceptable collateral.

To ensure a successful agricultural season, stakeholders felt that there was need to address the following issues:

- Tenure security on farms
- Secure lines of credit
- Strive for market driven production
- Capacity building of farmer groupings
- Facilitation of availability of affordable inputs on time

Session 3: Stakeholder inputs into analysis of current status

Stakeholders went into group work to discuss two questions:

- What do you think are the priorities for action in order to have a successful 2009/2010 agricultural season?
- What do you think are the priorities for action in order to have a successful 2010/2011 agricultural season?

The groups defined a successful agricultural season as getting the agricultural system working to enable targeted production in meeting food security at household and national levels. The groups then brainstormed on priorities for action before settling on 5 priorities. The priority list included, finance, extension, markets, land, irrigation and infrastructure, capacity building and training, information and extension, disease/pest control, research and development and inputs and genetic material. The top five were land, affordable finance to primary producer, inputs, capacity building and skills development and markets. With regards to land the major issues raised were land tradability, security of tenure for all farmers, and bankability of the farmer. For affordable finance to primary Producer it was critical to look at it from short, medium and long term.

As far as the 2010/2011 agricultural season, the groups spoke on the following priority areas for action, Land availability, tradability so as to secure finance, security of tenure to attract investors and utilisation. Affordable finance to primary producers so as to source short (seasonal) and medium term (equipment, assets and lease finance) inputs whilst long term finance is availed for infrastructure. Major inputs required for the season to include: livestock breeding stock, fertilisers, seeds, chemicals, drugs, tools and equipment, stock feeds. The crucial issue here will be “availability, affordability and access” to supplies and that finance be made available in time (May 2010). The area of capacity building and skills development includes the capacitating of the farmer as the end user of finance, procurement of tools and equipment, strengthening of associations and unions, and
improvements in extension service staff. On markets the groups sought: facilitation with widening access through opening of borders, through regional integrations institutions like SADC, COMESA, EPA. There was also an appeal for protection from stronger neighbours (such as South Africa and the developed countries) and conflicting interests.

Sessions 4, 5, 6 and 7: Official opening, state of preparedness by farmers, service institutions, agro-industry, and development partners.

The Minister officially opened the conference and highlighted that long and medium term credit to farmers was vital for the growth of agriculture and infrastructural development on farms. The Minister challenged the agricultural sector to produce more cost effectively so as to compete with regional and international markets. The Ambassador to the Royal Netherlands Embassy highlighted that the lack of tenure security, lack of respect to property rights (including the BIPPA) and the disruption on farms were among the challenges affecting agriculture recovery. The ambassador challenged government policies to be holistic as the performance of the agricultural sector was depended on other sector ministries such as energy, water and infrastructure.

On state of preparedness by the various farming unions, the farmers expressed that the economic crisis was still critical as was evident in the current season where farmers lacked markets for their produce. The farming unions noted that they were better prepared this season than previous years. Tobacco farmers had a substantial crop already on the ground. There was concern in the farming community of an El Nino effect that may affect crop especially grain production this season. The livestock sector noted that the sector had managed to contain disease outbreaks in the past year. The development of the sector was needed so as to ensure viability.

On the state of preparedness by state institutions, presenters on extension and farmer training, livestock and veterinary services, irrigation, research and development and mechanization, gave elaborate presentations on the current status of extension and farmer training which was supposed to cover 1 200 000 communal, 75,697 old resettlement, 8,500 small scale, 800 large scale, 145,775 A1, 16,500 A2 and some peri-urban farmers. However there was a common running thread of challenges around high staff turn-over, loss of experienced staff, dwindled funding and deteriorating or outdated facilities. Operations were severely hampered by lack of transport making extension staff immobile, very limited stationery for training and absence of in service training. The concern by all was for an increase in operational resources and some incentives to retain staff. The sector recognized the following as priority areas: increased operational resources, staff retention schemes, improved information management, in-service staff training and improved transport.

The agro-industry despite operating below 30 percent was ready to offer support to farmers in terms of inputs and mechanical supply. The sector depended on the support from other institutions such as energy supply and availability of finance in light of the credit crunch.
being experienced in the country and globally. The agricultural service institutions especially
government had suffered a high staff turnover, limited resources needed to build skills in
order to meet the demands of the farming community.

The development partners intend to increase smallholder production through countering
poor management, low yields and declining extension support. $74 million had been set
aside by the multi-donors to assist farmers in input and other support. For the 2010/11
season, there would be a move from the free input program towards the voucher system as
practised in Malawi. The programme would also strongly support the strengthening of
extension.

Session 7: Stakeholder dialogue on recovery and growth plans

A session on recovery and growth was conducted through group discussions. The groups
were divided along the following sectors: agricultural financing; inputs and outputs markets;
agricultural services; food security; future needs for small scale farmers; and agro-industry.
The groups brainstormed and discussed what constitutes an overall strategy for recovering
the agricultural sector in the next 2-5 seasons and prepare a short statement of such a
strategy. They then identify key issues and recommendations for the sub-sectors: farmers
groups; government; donors; and agro-industry. The finance group focussed on failures and
successes and they registered government’s need to put in place a system of secure titles
that are tradable and could be used for collateral that is tradable tenure particularly given
that the current 99 year lease is not tradable nor does it allow sub leasing. With regards
farmer groups, it was important to develop credit worthiness and lobbying skills.
Government was to ensure land tenure and an enabling environment and provision of
utilities like electricity and water. Solving the land title issues was a prerequisite to the
unlocking of finance and attracting investment. Development partners, industry and agro
industries were to chip in with alternative finances, appropriate technology, equipment,
research, complementary extension, skills development and capacity building.

In defining a successful agriculture season and an overall strategy, the following suggestions
came up from various groups:

- To get the agricultural system working; to enable production of commodities as per
  set targets to meet food security at household/national levels.
- To capacitate farmers to carry out farming as a business, government to provide
  enabling policies and donors to enhance this development process.
- To be food secure; produce a surplus for export and earn foreign currency through
  sustainable and industrialized agricultural sector.
- Have a vibrant agro-industry which generates jobs and wealth.
- Develop a viable and sustainable agricultural industry compatible with the imminent
  climate change.
• Potentially market oriented; profit oriented and farming as a business

The strategy for agricultural recovery should have the following elements: price support; targeted input support; training of farmers; infrastructure development; appropriate technology; agro-processing; improving access to credit; and a voucher system. Training of farmers should include how to: produce competitively; negotiate contracts and finance; prepare budgets and cash flows; agribusiness ethics; marketing and trade standards and grading system. Farmer organizations need to focus on: commodity associations; capacity building; organizational development; agribusiness oriented; membership controlled; and legal entity. Government needs strengthening capacity of MoAMID; embrace private-public-NGO partnership for development; sustain an enabling policy environment; and ensuring of property rights and security of farmers.

Donors were expected to enhance consultations with local stakeholders; complement government efforts in development project planning; target both vulnerable and commercial-oriented farmers; and be non-discriminatory in targeting partnerships for development.

Agro Industry should acknowledge small scale farmers as business partners; promote appropriate technology for small scale agricultural development; and offer viable prices to farmers.

**Session 8 Closing and way forward**

Participants suggested improvements to the NAC as follows: (i) commissioning position papers on identified priority areas or issues and sharing the findings among the stakeholders; (ii) organization of a number of retreats to clarify policy position and achieve a common voice and position on key issues; (iii) organization of a number of strategic seminars with the stakeholder, Government, civil society, the private sector, and other organizations; and (iv) dissemination of analytical findings and strategic positions to the Government, the stakeholders and development partners through the media, including policy briefs on current topical issues; (v) establishing agencies or stakeholder consultative forums such as the national food security and nutrition council in which various stakeholders will be represented; (vi) conducting periodic public perception surveys on policy issues and issues of agricultural development concerns. It was recommended that a framework for stakeholder consultation be developed that would identify stakeholders, the appropriate timeliness for consultation, and the methodology and extent of the consultation needed. In the ensuing dialogue stakeholders wished the government greater capacity in its appropriate role of creating an enabling environment. They suggested that
the NAC be held earlier around April-May with consultation of key players ahead of time as necessary. Dialogue and planning should be futuristic and explore beyond the short term.

The Chairperson of the Agrarian Sector Technical Review Group, Marchel Germann from the Royal Netherlands Embassy provided a vote of thanks and paid tribute to the Ministry for planning the conference to involve stakeholder groups. The PS to the MoAMID provided the closing remarks to the conference. He thanked all of stakeholders that had supported the Agriculture National Conference. The attendance had overwhelmed him. The Ministry also intended to engage various sectors and create a better system for the nation to invest in the sector. He also appreciated that stakeholders knew where they were and where they would like to be. The sector had a lot of potential. The key was on reviving all agricultural sectors – commodities, crops and livestock, as it is all about cooperation for growth.
1.0 INTRODUCTION

The Ministry of Agriculture, Mechanization and Irrigation Development held a national stakeholder conference from September 30 to October 1, 2009. The goal of the conference was to review the current status of the agricultural sector and map out a strategy for agricultural recovery in the short to medium term. The specific objectives of the conference were to:

1. Review current status of the agricultural sector in Zimbabwe
2. Get stakeholder participation and input into formulating an agricultural strategy
3. Provide medium term strategies necessary for the growth of agriculture

Stakeholders from government, agro-industry, agro-service delivery institutions, farmer groups, farmers, civil society organizations working in agriculture as well as development partners were invited to participate. Approximately 216 participants attended the two day conference. The complete list of participants is attached as part of the annexes. The conference, hosted by the Permanent Secretary of the Ministry of Agriculture, Mechanization and Irrigation Development provided an opportunity for the Ministry to interact with various stakeholders so as to allow their input in recovery and growth plans. The conference also provided an opportunity for the stakeholders to discuss their state of preparedness and challenges faced for the 2009/10 agricultural season and beyond. Technical papers on baseline survey of the agrarian sector, household and national food security, inputs and outputs markets and agricultural financing for farmers were presented in plenary. The papers had been commissioned by the Agrarian Sector Technical Review Group (ASTRG) of the Multi-Donor Trust Fund (MDTF) coordinated by the World Bank.

1.1 STAKEHOLDER PROCESSES

The new inclusive government has put priority on ensuring that the views of all stakeholders are heard and taken into account in policy making. As a result citizens have become increasingly interested in actively participating in the policy decision-making process. This is an important sign in the recovery of the country and in particular as it relates to building an inclusive culture. It fosters a sense of ownership among the different stakeholders. It also enables stakeholders to make better informed decisions based on the valuable information, feedback and ideas that each of the participants bring to fora. The groups were as follows:

- Farmers and farmer organisations
All stakeholder groups were given an opportunity to present their views to the meeting. In addition they expressed and shared views during plenary sessions and the group discussions which focused on particular questions relating to recovery of agriculture. It is hoped the process laid the groundwork for continued consultations among the stakeholders and for coordinated actions within the sector.

The challenges facing Zimbabwe’s agriculture need new approaches based on a stable policy environment within which farmers and agribusinesses would work and invest. The country needs to establish a stable, long-term policy and regulatory frameworks for the development of investment in agriculture; to enhance national financial allocations (such as the 10% of public expenditure proposed by the NEPAD CAADP process); to direct international development assistance towards the agricultural sector and to undertake comprehensive stakeholder consultation processes in the design and implementation of agricultural programmes.

The general goal of stakeholder consultation is to work towards developing a common, shared definition among stakeholders and decision-makers of the problems and opportunities being addressed, to define common objectives, to explore alternative ways of achieving the goal. The desired outcome is a convergence of views around a preferred course of action which can be taken by government in partnership with some or all stakeholders. It may also be that the consultation will result in clearly defined roles for the stakeholders as well as agreement on shared partnership for the implementation or delivery of proposed programmes or in devolution of responsibility to stakeholders.

1.2 WELCOMING ADDRESS BY PERMANENT SECRETARY IN THE MINISTRY OF AGRICULTURE, MECHANIZATION AND IRRIGATION DEVELOPMENT, MR NGONI MASOKA

The conference started with a welcome address by the Permanent Secretary of the Ministry of Agriculture, Mechanization and Irrigation Development, Mr Ngoni Masoka. He noted that the country had deregulated the marketing systems and had gone through a massive injection of mechanization. He spoke of recent events that had significant impact on agriculture in the country such as land reform, deregulation of the market and
mechanization but still witnessed low production for a variety of reasons including drought. The government had put in place US$200 million input scheme which includes seed and fertilizers. This would be implemented as a complimentary to the FAO Smallholder Emergency Programme. Government would now align its policies to CAADP.

1.3 PRESENTATION BY NEPAD’S DIRECTOR OF FOOD AND NUTRITION, DR BUYITSHEPO GIYOSE

The presentation by NEPAD’s (New Economic Programme for African Development) Director of Food and Nutrition, Dr Bibi Giyose, outlined the primary focus of NEPAD in addressing the Millennium Development Goals (MDG’s). She specifically identified MDG 1 which focuses on the reduction of poverty and hunger in Africa by 2015. Africa has lacked in development as evidenced by malnutrition problems. Dr Giyose explained that the NEPAD framework aligns to country frameworks to address targets set nationally and at continental level. Dr Giyose noted that CAADP was needed at regional, national and continental level so as to ensure food security through increased incomes as well as poverty alleviation. In 2003, member countries in the continent had committed 10% of their national budget to agriculture. More than 20 countries in the continent had so far been able to commit to this allocation. The NEPAD presentation also highlighted that the programme had so far allowed Africans to have a common agenda at global fora. One of the challenges on Zimbabwe agriculture was on ensuring the revival of extension services so as to deliver the necessary services to rural farmers. Dr Giyose mourned the dearth of extension and implored African governments to resuscitate this sector. She challenged African governments to put their money where their mouths are. There was need to inject money into agriculture and in some countries allocation of more than 10% of public expenditure was encouraged but that entirely depended on the focus.

1.4 PRESENTATION ON CAADP BY THE CHIEF ECONOMIST, ARTHUR NYAMUKAPA, MINISTRY OF AGRICULTURE

Mr Nyamukapa from the Ministry of Agriculture, Mechanization and Irrigation Development presented the session on CAADP (Comprehensive African Agricultural Development Program). He provided information on how the country had moved towards implementing
CAADP. One of the challenges presented was on ensuring that the country would strengthen the role of commodity associations and farmer groups. Various challenges being experienced in the country included the loss of products through post harvest and the veld fires that had destroyed the flora and fauna of the country. Mr Nyamukapa felt that the contribution of 10% by government was important so as to ensure commitment in the process. The rest of the other stakeholders were challenged to commit beyond the government’s 10%. The process required that the country come up with a “compact” and the ministry had committed to have it ready by the end of the year. A stakeholder workshop would be held to ensure broader, national ownership of CAADP where the programme would be further unpacked. Mr Nyamukapa circulated documents on the CAADP implementation process and circulated a report on one the stakeholder processes held in August 2009.

Discussion:

- The 10% allocation into agriculture being encouraged by NEPAD does it take into account the contribution made by the private sector, donors and farming community?
- The deadline for compact set for March, 2010 can the country not fast track it so it is complete before the end of the year? The deadline had been set by COMESA but the country expected to complete this phase in December, 2009.
- The Ministry needs to look at changing the legislation that relates to farmer organizations as it has a bearing on CAADP.
- The areas of focus of CAADP are too wide; can the ministry focus on a few issues to kick start agriculture?
- What is the current percent that the Ministry has committed is it 6% or 10%? Zimbabwe has on average been allocating 3-7% on agriculture during the past 10 years.
- The Asian experience has shown that governments in those countries spent 15-30% over 20 years before the rural economy could take off. This might be an experience worth learning from.
2.0 CURRENT STATUS OF AGRICULTURE

3.

2.1 Baseline Information Survey of Zimbabwe’s Agrarian Sector by Vimbai Vudzijena, Consultant

Mr Vimbai Vudzijena presented a paper on the baseline survey that had been carried out on agriculture. The survey was mostly desk research and key findings include the fact that more than 90% of the farmers were now termed smallholder.

The paper outlined the structure of Zimbabwe’s agriculture which showed that the farming community was composed of 1 349 549 farmers of which 3691 (0.3%) were Large Scale Commercial Farmers owning or utilizing 14.24% of the land, 1 100 000 (81.5%) were Communal Area farming households on 49% of the land, 8000 (.6%) were Small-scale commercial farmers using 4.2% of the land and 237 856 (17.6%) were Resettled farmers on 31.5% of the land.

With respect to scale of production, agricultural production is dominated by smallholder farming households who constitute 98% of the farmers, small-scale commercial farmers who make up 1.5% of the farmers and with large-scale commercial farming making up to 0.5% of the farmers.

The tenure arrangements are as follows:

- Communal areas based on traditional/customary resource access
- Small scale commercial on leasehold with option to purchase
- Large scale commercial with freehold title
- Resettlement areas made up of Old Resettlement/model A1 on permit system and Model A2 with offer letters that may transform into 99 year lease

The organization of agriculture include the state sector, private sector, and farmers’ organizations. The state sector is responsible for policy formulation, financing and marketing of selected crops. The state sector is responsible for research, extension, farmer training, market infrastructure, irrigation infrastructure development, and off-farm social and production infrastructure. The state sector guarantees national food security composed of 936,000 tonnes of maize, 300,000 tonnes of wheat and a standby offshore financial facility.

There are four farmers’ unions, namely the Zimbabwe Farmers’ Union (ZFU) representing mainly the smallholder farming households, the Zimbabwe Commercial Farmers’ Union (ZCFU) representing black commercial farmers, Zimbabwe National Farmers’ Union (ZNFU)
representing new farmers on land settled through the land reform programme, and Commercial Farmers’ Union (CFU) representing predominantly white commercial farmers. All the unions are involved in providing the following services for their members: extension, research, training, input distribution, output marketing, policy negotiations and agricultural information.

The private sector is heavily involved in extension, research, training, input production and distribution, output marketing, value addition agro-processing and financing provided through commercial bank loans and contract farming.

Several NGOs and civil organizations are involved in agriculture mainly in the smallholder sector. Their activities include input distribution, training of trainers, project coordination and research.

The paper outlined the following as priority areas for the agrarian sector:

- Infrastructural provision on resettled farms
- Rehabilitating vandalized irrigation facilities
- Mechanizing the Agricultural sector
- Revitalizing agricultural production

The following are stated as challenges facing farmers:

- Tenure insecurity
- Inadequate, vandalized & aged equipment and machinery
- Inadequate Production and social infrastructure
- Irrigation infrastructure vandalized and costly
- Limited skills and knowledge of new areas
- Limited access to inputs-labour, seed, chemicals, fertilizer, stock feeds.
- Limited/ No access to commercial loans
- No information on alternative crop markets

The input production and distribution faces the following challenges:

- Established seed producers have been reduced in numbers
- New seed producers have inadequate and limited skills
- Fertilizer production is adversely affected by ZESA and NRZ capacity challenges
- Agrochemicals and fertilizer affected by cash liquidity problems
- Declining crop production affects stock-feeds production
- Poor working conditions reduce labour supply
- Timely and costly to re-engage input dealers/distributors

Product marketing challenges include re-engaging output traders, limited information on available product markets, finance required to create GMB alternative marketing infrastructure.
The state sector’s support to agriculture is constrained by

- Budgetary limitations
- Aged machinery and equipment
- Brain drain
  - Training colleges cover only 7% of demand
  - Extension–farmer ratio is estimated at 1:600
  - Tillage services are often inadequate, expensive and erratic
  - On-going irrigation schemes have taken time to complete
  - Strategic grain reserves is not operational for a couple of years
  - <20% had full complement of on-farm infrastructure (2001).

**Private sector participation is limited by**

- Commercial bank finance inadequate- 20% of credit demand
- Some private training colleges on the verge of collapse in 2008
- Production low for optimal agro-processing
- Private input and output traders crowded out
- Low manufacturing capacity for equipment and inputs

By nature civic organizations and NGOs were constrained by funding which is sourced from donors who in turn have been severely affected by the global financial and economic crisis. Similarly, the farmers’ organizations are faced with reduced financial support from their traditional funders.

The paper noted that there are challenges to crafting an agricultural policy framework. Food deficit areas often pay higher food prices. Majority of farmers in regions III to V were net food consumers. The paper noted that the Grain Strategic Reserves were depleted and threatened by continued low grain output. Exclusive dependence on commercial bank finance which is a new trend being pushed, would exclude the poor.

The paper recommended the following detailed studies

1. Assess the nature and extent of tenure insecurity
3. Assess extent of constraints of government ministries.
4. Carry out baseline studies on:
   - Irrigation
   - Social and productive infrastructure
   - Agricultural Training facilities
   - Agro-processing activities
   - Agricultural equipment and machinery manufacturing activities
   - Input production (seed, fertilizer, chemicals, stock-feeds)
   - Private input and output traders
   - Commercial Bank Finance
   - Agricultural labour market
   - Civil Society agricultural activities
5. Assess opportunities for the re-introduction of Zimbabwe Agricultural Commodity Exchange (ZIMACE).

6. Review smallholder financing systems in the country using regional experiences.

Discussants:

Dr Reneth Mano, Agricultural Economist, University of Zimbabwe

- Dr Mano stated that the paper was a very comprehensive baseline on agricultural scene in the country. The topical issues on agrarian structure on land ownership, usership issue and control issue was politically charged. Of importance in land issues were political, economic and social aspects. Land derives its value from being an economic product as it is the beginning and end of people’s livelihood. Its social value is based on the economy. The challenge is on how to build the capital asset value of land. Only 20% of farmers in the country are able to access capital from banks as they have the necessary collateral. Yet over 80% of the people on the land are sitting on resources with potential capital assets. But now the land is viewed as a valueless asset and thus not usable as a form of collateral. Communal land farmers sustained agriculture in the past as a result of access to loans from the Agricultural bank. These communal farmers have failed to unlock the capital asset value of land. Dr Mano challenged government to address the issue of tenure insecurity as people are subjected to risk of dispossession thus land in its present state is used for semi-productive purposes. The new owners need to be empowered with appropriate documentation and make land markets fully functional. The challenge was to separate ownership from usership issue so as to get the true market value of the land.

Mr Charles Taffs, Commercial Farmers Union

- Mr Taffs stated that agriculture in Zimbabwe was facing a crisis with under financing. There is a looming El Nino effect that may be similar to what the region faced in the 1991/92 drought. If Zimbabwe’s neighbours become deficit in grain, the country could face a crisis. The USA supplies 75% of total world grain. With bio-fuels, the USA could have a grain deficit. Zimbabwe cannot afford as a country not to grow its own food. There is need to deal with the ownership issue of land. There is need to ask one another as citizens of the country why we were far ahead of our neighbours in terms of agriculture in the past. This was due to security of tenure. The country can create a new ownership issue after resolving the current situation. Without security of tenure, Mr Taffs commented that there would not be agricultural growth. Ownership of the land must be based on agricultural excellence rather than race.
**Discussion:** The main comments from participants included:

- People have forgotten to follow the spiritual dimension to land
- What is collateral and what is not? There is need to explore this issue
- Why is it that banks today do not honor movables as forms of collateral as there are very few of our people with houses
- This country has seen people’s assets being devalued
- Private colleges such as FDT have not collapsed as the consultant noted. A paradigm shift has occurred in which farmer training is on the farm with practical demonstrators and workshops and for a shorter period than before so as to allow people more time on their farms. It is not true that private agricultural sectors have collapsed. Farmers Development Trust which is basically a capacity building institution is still functional. Challenge for this is that FDT needs institutional strengthening to meet the huge numbers that require its services
- Because farmer training is a public good, the sector needs more funding from donors, private sector and government.
- Those in Natural regions IV and V should be encouraged to grow small grains for them to move away from being just net importers of food. Data on farmers should be disaggregated by gender so as to enhance the role of women as farmers.
- There was need to ensure equitable representation of women despite the women making up the majority in the agricultural sector, the programme only had a few women presenting or taking a role in the conference.
- The banking sector should to change to the “new dispensation” in its lending portfolio administration as well as that all farmers, old and new should be speaking with one voice.
- The farm labour issue was raised to include farm workers as direct beneficiaries of the land reform as well as their compensation for loss of employment in the process of land reform.
- The issue of progress towards the one-man-one farm policy was raised.
- A discussion ensured on the need for a proper assessment of what was on the ground and a concerted effort to make resource use more effective in this transformational period.
- The issue of securing land tenure and respect of property rights was raised and discussed.

### 2.2 Presentation on Input and Output Markets by Dr Chrispen Sukume, Consultant

The paper outlined the state and structure of Zimbabwe’s agriculture and how these have a bearing on the state and performance of the input and output markets. Smallholder farmers – Communal Area (CA), Old Resettlement, Newly resettled A1 farmers – comprise the largest group of farmers. Together they number approximately 1.3 million farmers occupying greater than 26 million hectares of land. Historically the sector used to supply most of its food needs as well as the bulk of marketed food grains and cotton. Recently,
Zimbabwe has been experiencing frequent food production deficits linked to droughts as well as inadequate access to input and output markets.

The paper outlined the trend in smallholder crop production and marketing of cereal and export cash crops. From 1993 to the 2000s the area under maize has been following an increasing trend. Mean maize yields were 875 kg in the 1980s, 738 kg in the 1990s and 603 kg per ha in the years 2000 to 2006. Area under sorghum has increased from below 100,000 ha in 1992 to about 200,000 ha in 1997 and more than 300,000 ha in 2004. But sorghum yields have been declining - average of 391 kg/ha in the 1980s, 302 kg/ha in the 1990s, 301 kg/ha in the 2000s. The trend has been expansion in cropped area but decreasing yields. The main limitation was difficulties in access inputs and periodic droughts.

With respect to cash or export crops, there has been phenomenal growth in cotton and tobacco production. Area under cotton grew from 15,000 ha in 1980 to peak at 320,000 ha in 2001. Average cotton yield in the 1980s was about 727 kg/ha, 550 kg/ha during the 1990s (attributed to 1992 drought and high input costs due to liberalisation) but recovered to about 757 kg/ha during the 2000s. Communal area under flue-cured tobacco grew from 1165 ha in 1996 to 5805 ha in 2002, but yield have been very unstable averaging 886 kg/ha over the period 1995 to 2007. The driver for the trend was foreign currency retention and contracting activities.

The area grown under groundnuts was around 100,000 ha in 1985 rising to about 200,000 ha during the period 1988 to 1991. The annual average was about 150,000 ha per annum. Groundnut yields indicated an upward trend from about 360 kg/ha in the 1980s to 450 kg/ha in the 1990s and 480 kg/ha in the 2000s. The main driver of groundnut growth since the 1990s was contract growing by smallholder farmers. Other oilseed crops have also enjoyed an upward trend. Sunflower, that was on a continual decline during the late 1990s, partially recovered and stabilised in the post-2000 period. Edible beans and soybean production which were very minor crops during the 1990s have grown almost exponentially during the 2000s.

With respect to livestock, the smallholder farming sector by 2006 owned over 90% of the cattle, 98% of the goats and 80% of pigs in the country. As a result of the land reform programme, from 2001 onwards cattle on large scale farms declined significantly from about a quarter of the national herd to between 9 and 13% of the national herd. The shortage of beef from the large scale sector has increased demand for smallholder cattle as indicated by the increase in slaughtering from the sector since 2001. In 2008-9 food deficits led to distress selling from smallholder areas. There is increased demand for small livestock species but the marketing is poorly organised with preponderance of middlemen.

Fertilizer availability has been characterised by shortages due to low capacity utilisation as a result of lack of foreign currency, reduced capacity of the NRZ that led to the bulk of raw materials having to be transported using expensive road transport and frequent electrical
power cuts especially for Ammonium Nitrate manufacture. The re-introduction of input price controls in 2001 reduced viability of companies leading to reduced production.

Availability of seed particularly for maize seed has fluctuated significantly in the 2000s. In the period 2000-2003 seed production was reduced substantially due to reduction in land under maize seed as a result of the fast track land reform programme. The shortfall was mitigated by high stocks in 2001-02 and 2002-03. The shortage became pronounced from 2003-04 to 2005-6 seasons. Though production recovered to 35,300 tonnes in the 2006 harvest, severe shortage of fertilizer for seed production and sub-economic prices paid to contracted seed farmers negatively affected seed production and supplies.

The reduced availability of inputs (fertilizers, seeds, chemicals, etc) during the 2000s led to increases in prices of inputs beyond the reach of most smallholders. As a result, price controls were instituted in October 2001. The price controls in face of shortages drove most input marketing to the informal parallel markets. In response, government intervened by introducing various schemes to make inputs available, mainly distribution through GMB. The government schemes, donor input provision schemes as well as contract schemes had the impact of crowding out private input dealer network and breeding a parallel market. Access to inputs was also aggravated by poor roads and other aspects that led to high transactions costs in inputs delivery. The major limiting factor was, however, the lack of financing for working capital to smallholders famers.

Marketing of grains, especially maize and wheat, has been characterised by GMB monopoly for most of the 2000’s and controlled prices under hyperinflation. Following the Government of national unity, grain marketing had been liberalised with GMB becoming the buyer of last resort. The prices are generally around import parity but the GMB has no money for subsidies.

Export crops (cotton and tobacco) are generally being sold under a combination of contract and spot markets. These arrangements have made inputs accessible to producers. However, the contracts are unbalanced leading to side marketing.

Livestock marketing is characterised by poorly organised livestock marketing and a preponderance of middlemen. There are few traders at livestock auctions. Small livestock are not adequately catered for. Improvement in livestock marketing would include providing market information (prices, auction announcements) and setting up of a more spatially distributed livestock auction system. The Cold Storage Company should be buyer-of-last-resort to protect farmers and help develop small livestock production and marketing.

For the future, effective cereal market liberalisation needs good access to information and “ZIMACE”-like institution. The GMB floor price should be export parity not import parity to reduce government expenditure. There should be linkage of grain marketing and input sales.
With respect to export crops, there is need for a more decentralised marketing system especially for tobacco. There should be a review of contracting arrangements to protect farmers and provide an accessible dispute resolution mechanism.

There is need to facilitate national fertiliser and seed industry to operate at full capacity. For improved accessibility and more affordable inputs, there is need to facilitate the re-establishment of agro-input dealerships within the smallholder areas. For all farming categories, there is need to develop alternative mechanisms to enhance input access to farmers such as warehouse receipt systems, contract farming mechanisms, cooperative activities, among others.

2.3 **Presentation on Household Food Security by Simon Pazvakavambwa, Consultant**

The paper examined the state of household and national food security and the underlying causes. It analyzed government intervention undertaken to address the problem.

Food availability in Zimbabwe is mainly determined by the country’s domestic production. However, since 2000 domestic production has failed to meet the food requirement of the country as evidenced by:

- Decline in agriculture surplus
- Declining food availability
- Limited or restricted access to food (especially grain)
- Households not able to afford adequate grain for their food security needs

The paper shows that various and interrelated factors were responsible for the problem of household and national food shortage. The underlying factors in general can be grouped under three main types as natural causes, socio-economic factors, and policy failures.

The natural factors include drought and environmental degradation. The others are socio-economic constraints such as lack of infrastructural services like credit, marketing and transport communications; population pressure and shortage of farmland in communal lands and lack of productive assets. Others include:

- Inadequate input availability
- Skewed distribution of inputs
- Limited support to input industries seed, fertilizer. The imports syndrome
- Poor, late or inadequate land preparation
- Late input distribution and distribution bottlenecks
- Poor beneficiary targeting

In addition, farmers did not have access to other consumable agricultural inputs such as fertilizers, pesticides and improved seeds which are essential to increase agricultural productivity.
While the main food security constraint is due to cyclical patterns in rainfall, poor infrastructural services, such as micro-finance, marketing, transport communications, policy failure aggravated the situation. This included price controls market manipulation, GMB monopoly, poor targeting of beneficiaries of various government support schemes and the demise of the strategic grain reserve.

There are some activities undertaken by the government to address the agricultural and food crisis. These include:

- Government input scheme (GIS) 2000 - 2003
- Productive sector facility (PSF) 2004
- Agricultural Sector productivity enhancement facility (ASPEF) 2005 -2008
- Maguta / Inala 2005 -2009
- Champion Farmers scheme 2008 -2009
- Fuel scheme for farmers 2006 -2009

Some of these strategies and interventions were inappropriate which aggravated the agricultural problems and food insecurity. This is because the intervention strategies were not only ineffective but also disrupt normal production activities and distorted the markets. A good number of these programs were designed at the top and imposed upon the farmers. Furthermore, most initiatives were implemented through line agencies and other organizations that not necessarily are in the position of successfully implementing the project.

The consequence has been a failure and worsening of the situation. The other responsible factors for the recurrence of food shortages in general are institutional weakness and inappropriate policies.

- Loss of qualified staff
- Loss of institutional memory
- Marginalization of appropriate institutions
- Poor budgetary support
- Use of inappropriate institutions such as the army in running the Maguta Scheme and GMB for input distribution

It is recommended that to improve and achieve household food security, the following should be embraced:

- Engaging development partners to leverage financial resources for the agriculture sector
- NGOs and Civil Society groups
- Deregulation of agricultural markets
- Market revival
- Reinstatement of farmer initiative instead of government-led programmes
Support to farmer organizations and building their capacity for mobilizing their members and for engaging input and output markets.

Institutional reforms and strengthening Research and Extension

The following are recommended strategies:

- Agricultural input and output marketing systems should be improved. Inputs should be made available early and be made more accessible by bringing them as close to the farmers as possible by utilizing input dealerships in rural areas. The inputs should be affordable to the farmers.
- Inputs should not be provided for free except to very poor farming households.
- Improve beneficiary targeting (The right inputs in the right farmers’ hands)
- Create capacity to produce more of our own inputs locally
- Revitalize agricultural credit schemes for farmers
- Ensure optimum land utilization by beneficiary farmers
- Strengthen supporting institutions, especially research and extension.

Discussants

The discussants for this paper were led by Mr Nkatazo of the National Seed Association and Mr Mandizha of Grain Marketing Board (GMB). Mr Mandizha explained that the GMB had been involved in a form of backward integration in attempts to help the farmers as their main thrust is in grain purchase. GMB was now seen to be taking part in aspects of input distribution and contract farming. He stated that currently GMB had surpassed last year’s grain intake deliveries and managed to clear payments to farmers from April to July 2009. He was however, concerned with the impact of import versus export parity prices on the viability of the GMB as an entity. As with most institutions, the GMB had been facing liquidity problems.

Mr Nkatazo commented that seed had already been delivered for this season including that which has been purchased by NGOs for communities. The country was only able to produce just below 19,000 tonnes out of a requirement of 35,000 tonnes and as such the balance had to be imported. In the past they have been able to produce the required 35,000 tonnes with the help of farmers, institutions and government. He also noted that money to buy the inputs (including seed) is hard to come by for most of the smallholder farmers in the country. The roads that are used to ferry inputs and outputs in rural areas are in a very bad state thus affecting deliveries. Some of the rural area shops had closed down but this season, he was pleased to note that some of these shops and agro-traders had reopened to service farmers with inputs sales.

Stakeholders’ Inputs

Contributions from the floor cited lack of adequate and timely access to financing, information and other inputs as a serious pre-harvest constraint, forcing farmers to plant late and apply inadequate fertilizers. The general shortage of inputs forced farmers to rely
on middlemen for inputs usually at highly inflated prices with no assured quality of seeds and fertilizers. Due to the general shortages, particularly in the agro-produce and agricultural marketing sectors, there are several players who play the role of middlemen without having anything to do with value addition. The lack of contract enforcements made attempts to facilitate production through production and market contracts extremely risky. These challenges face all farmer categories, i.e. smallholder, old and new resettlement (A1 and A2) and large-scale commercial farmers.

There is need to build commodity specific knowledge on production, post-harvest management, entrepreneurial skills and use of improved practices among small farm holders. Some of the pricing of inputs and agricultural commodities (mainly maize and wheat), paid relatively little attention to the link between production and marketing.

The stakeholders emphasized the need for a demand-driven approach, where the key players themselves make investment decisions related to technology, infrastructure, marketing and capacity, rather than the investments being supply-driven by the public sector. It was noted that the stakeholders in the agricultural industry are poorly integrated, and attempts to provide institutional mechanisms that facilitate the stakeholder dialogue and effective networks were overdue.

**Discussion: the main points in summary included:**

- The country’s legislation does not allow for the sale of home-grown seed. But farmers will still grow something despite seed being not available on the formal market. This is an area that government and stakeholders need to relook.
- The question as to whether farmers were able to barter crops for inputs this season was raised and discussed. The assessment was that whilst it was theoretically possible, there were no guarantees or regulations to this practice.

### 2.4 Presentation on Agricultural Finance for Smallholder and Large-scale Commercial Agriculture by Mr. Casper Chibanga of the Commercial Bank of Zimbabwe

Mr Chibanga made the presentation on behalf of Dr. Mangudya, the Chairperson of the Bankers Association of Zimbabwe (BAZ). There was no written paper provided but Mr. Chibanga made a PowerPoint presentation. The paper highlighted that funding for the Zimbabwe agricultural sector had slowed down since 2001 due to (i) slow down of the economy, (ii) lack of credit facilities for bank for onward lending to farmers and (iii) the reorganisation of the agricultural sector following the land reform programme. Despite these, agriculture remained the backbone of the economy and therefore the biggest beneficiary of funding from the financial sector receiving 51.2% of funding by all commercial banks in Zimbabwe. In comparison, the manufacturing sector received 19.1%, mining sector 7.7%, distribution 10.4%, services 8.2%, tourism 0.7%, transport 0.9% and others 1.8%.

The existing funding arrangements can be characterised as:
- Short term funding: earmarked for working capital in line with short term deposits available; with tenure of funding between 1 to 3 months;
- Lease Financing Facilities: designed to assist with capital funding requirements and augmenting farm mechanisation programmes with tenure of funding of between 6 to 12 months;
- Contract Farming Financing Schemes: mainly for tobacco and cotton
- 2009/10 Government Input Scheme in which the Government has engaged input suppliers for the supply of mainly fertiliser and seed. The financial institutions are to assess farmers who will access inputs from GMB depots. The tenure of funding is 270 days or nine months.

The challenges for financing agricultural production were (i) collateral requirement by banks, (ii) funding structure, unviable markets and breach of production and marketing contracts by farmers.

On collateral requirements by banks, Mr. Chipanga highlighted that it was a statutory requirement that lenders request collateral. The observation is that some farmers are unable to provide collateral which in turn impacts on level of funding from Banks.

Mr. Chipanga outlined the general requirements for a farmer to access loan facilities:

- Application letter clearly outlining:
  - type of facilities required,
  - amount,
  - purpose,
  - source of repayment and tenure
- Cash flow projection in USD covering the tenure of the facilities being applied for;
- Proposed Security which should be tangible;
- Production history; and
- 99 year lease

Commercial banks face several constraints in lending to farmers. Following introduction of multicurrency regime and since there is no lender of last resort the banks are not yet capacitated to lend for long term. This is because most deposits are short term. This is further aggravated by the lack of long term credit lines from external financiers due to perceived country risk. The linkage between provision of farming loans and marketing was highlighted. The financial capacity of buyers of agriculture commodities affects the farmers and loan repayments. The recent liberalization of agricultural produce has resolved pricing issues.

The side marketing of contracted crops such as cotton and tobacco has impacted negatively on contract farming schemes. The move to pay the farmer first on tobacco sales has distorted the stop order system.
Potential exists for commercial banks to make funding available for revamping the agricultural sector and boost food and cash crop production. However, there are a number of issues requiring serious and urgent attention, namely:

- Marketing arrangements that do away with side marketing;
- Rehabilitation of agriculture related infrastructure (i.e. dams, irrigation etc) and provision of technical support services to ensure stable production;
- Introduction of agricultural commodity exchange which will go a long way in resolving marketing of produce.

**Discussants and General Discussion**

The two discussants on the papers on input and output markets and household food security presented were Mr B Mukwende of ZFU and Mrs Chinamasa of ZNFU.

- Mr Mukwende commented on the need for a tracking system for beneficiaries of targeted input distribution so that adequate use of the inputs is assured. As things stand some real producers have lost confidence in the system as they are not sure if service providers will deliver. He also implored that more Research and Development is needed on appropriate technologies for smallholder farmers and as such resources should be made available to that activity. Many smallholder farmers, in his view had been short changed by contractors in the “contract-farming” arrangements and as such were viewed negatively.

- Mrs Chinamasa stated that bankers were in the “hot seat” and needed to make money available to farmers. In her union, her farmers had positive experience with the contract farming system and felt that it had worked to their advantage as long as it was negotiated properly.

- During open discussion the issue of security of tenure was raised as affecting availability of lines of credit. There is need for financial intermediation for short term (seasonal) to long term (up to twenty five years) and these need to be revisited.

- Commercial banks still required collateral in the form of immovable property.

- The issue of 10% of GDP investment was discussed again and some felt this should include investment by the private sector and farming community.

- There was a call to incorporate issues of climate change and sustainable investments for all future plans. Food security at the household level would be enhanced if it women’s access to arable land allocation is assured, including the distribution of seed packs to women.
3.0 STAKEHOLDER INPUT INTO STATUS OF AGRICULTURE

Following the plenary presentations on the technical papers by the consultants, groups were constituted to provide an input into the status of agriculture. Four groups addressed questions listed below:

- What do you think are the priorities for action in order to have a successful 2009/2010 agricultural season?
- What do you think are the priorities for action in order to have a successful 2010/2011 agricultural season?

GROUP responses:

What do you think are the priorities for action in order to have a successful 2010-2011 agricultural season?

- The groups started by defining a successful agricultural season as getting the agricultural system working to enable targeted production in meeting food security at household and national levels.

- The groups then brainstormed on priorities for action before settling on 5 most important. The priority list included, finance, extension, markets, land, irrigation and infrastructure, capacity building and training, information and extension, disease/pest control, research and development and inputs and genetic material.

- The top five were land, affordable finance to primary producer, inputs, capacity building and skills development and markets. With regards to land the major issues raised were land tradeability, security of tenure, and bankability of the farmer. For affordable finance to primary Producer it was critical to look at it from short, medium and long term:

<table>
<thead>
<tr>
<th>Short Term</th>
<th>Medium Term</th>
<th>Long Term</th>
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<tr>
<td>Inputs</td>
<td>Equipment Asset and lease finance</td>
<td>Infrastructure</td>
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- With capacity building, the farmer needs to be capacitated as end user of finance. It was even better done through farmer associations and unions which seem to have lost identity when compared to unions 10 years ago. Extension is also being described as dead and needs revitalization for the good of the farmer or look for
alternative, innovative and cost effective approaches. The market issue has been worsened by the dollarisation and cross border trading where some commodities like mealie meal is militating against local production. Some policy must be put in place to protect the local farmer.

**Top priority areas**

The top five priority areas that were picked from an array of issues needing resolution in order to make the forthcoming agricultural season a success were given as:

- Secure the farms according to the rule of law
- Secure lines of credit
- Strive for market driven production
- Capacity building of farmer groupings
- Facilitation of availability of affordable inputs on time

As far as the 2010/2011 agricultural season, the groups spoke on the following priority areas for action:

- Land: availability, tradability so as to secure finance, security of tenure to attract investors and investment, utilisation-which ensures actual and appropriate production from a bankable farmer
- Affordable finance to primary producers so as to source short (seasonal) and medium term (equipment, assets and lease finance) inputs whilst long term finance is availed for infrastructure.
- Major inputs required for the season to include: breeding stock, fertiliser, seed, chemicals, drugs, tools and equipment, stock feeds. The crucial issue here will be “availability, affordability and access” supplies and finance made available in time (May 2010)
- The area of capacity building and skills development includes the capacitation of the farmer as the end user of finance, procurement of tools and equipment, strengthening of associations and unions, and improvements in extension service providers staff
- On markets the groups sought: facilitation with widening access through opening of borders, through regional integrations institutions like SADC, COMESA, EPA. There was also an appeal for protection from stronger neighbours (such as South Africa and the developed countries) and conflicting interests.

**Group 3 and 5 addressed the following question:**

*What are the roles of key players in order to have a successful agricultural season?*

The groups brainstormed on the various players that are needed to revive agriculture in the short and medium term. The list was not exhaustive but stakeholders felt that they needed to identify the primary players involved, such as:
Government of Zimbabwe

- Ministry of Water Resources
- Ministry Economic Planning
- Ministry of Agriculture, Mechanization and Irrigation Development
- Ministry of Lands and Rural Resettlement
- Ministry of Finance
- Ministry of Women’s Affairs, Gender & Community Development
- Ministry of Environment
- Ministry of Local Government

Farmers’ Unions

- ZFU
- ZCFU
- CFU
- GAPWUZ
- NFA
- Commodity associations

Private Sector

- Seed Industry
- Agrochemical companies
- Fertilizer
- Irrigation and Farm Implements
- Finance Institutions
- Agro-processors
- Markets (e.g. Cottco, Zimtrade)

Parastatals

- GMB
- ARDA
- NRZ
- CSC
- ZESA
- PIB
- ARC
- ZFDT

Civil Society

- Faith based organizations
- NGOs / Trusts
Development Partners

- Donors
- International Agencies/Organizations

Pillars necessary for growth

1. Supportive Policy Environment
2. Institutional strengthening
3. Farmer capacitation
4. Improved markets
5. Irrigation and infrastructure development
6. Tenure security
7. Inputs availability
8. Finance

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<tr>
<th>PILLAR</th>
<th>STAKEHOLDER</th>
<th>ROLE</th>
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<tr>
<td>1.</td>
<td>Government (MoAMID)</td>
<td>Harmonization Implementation</td>
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<td>2.</td>
<td>Government and relevant ministry and development partners, private sector.</td>
<td>Institutional strengthening</td>
</tr>
<tr>
<td>3.</td>
<td>MoAMID, NGOs, Private Sectors, Farmers Unions</td>
<td>Supportive policy environment, farmer capacitation</td>
</tr>
<tr>
<td>4.</td>
<td>- Government (MoF), Regional International trade - Private sector – RECs.</td>
<td>Finance, supportive policy environment</td>
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<tr>
<td>5.</td>
<td>- Government (relevant ministry) - Private sector - Development partners</td>
<td>Finance, supportive policy environment and incentives</td>
</tr>
<tr>
<td>6.</td>
<td>Government (Lands, Rural Resettlement)</td>
<td>Tenure security and supportive policy environment</td>
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<tr>
<td>7.</td>
<td>Government, Private Sector</td>
<td>Inputs availability, finance, improved markets, institutional strengthening</td>
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<td>8.</td>
<td>Banks Development partners</td>
<td>Finance,</td>
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4.0 STATE OF PREPAREDNESS – FARMER GROUPS

The farmer groups provided a synopsis on their state of preparedness for the 2009/10 agricultural season.

**Mrs Chinamasa: Zimbabwe National Farmers Union (ZNFU)**

ZNFU was pleased to hear and highly commended that inputs were at GMB depots at this time of the season. An appeal was made to the banks to put their house in order and facilitate the purchase of inputs by the farmers. Mrs Chinamasa cautioned that the country was not out of the woods yet as the economic crisis was still very much evident. It was important to keep the momentum going so as to ensure recovery of agriculture.

**Zimbabwe Farmers Union represented by Mr B Mukwende, Second Vice President**

- The union had been in discussion with various cotton ginneries with a view to ensure that its members entered contracts
- Most farmers had not been able to purchase inputs needed for the season due to lack of money
- Farmers still have grain and oilseeds at their farms as there are marketing problems
- Generally the union and its members were better prepared this season than before
- Farmers have already prepared by 30 September and the hope was to provide services on time. The Union hoped consultations such as this would in future cascade to lower levels. The union will participate in the selection and monitoring of stakeholder groups. It had developed a databank of its members throughout the country.
- Mobilization and training of farmers is ongoing. Provincial and district offices have been set up with support from the European Union. The union has thus established a broad based structure at grassroots level. Farmers often lack information on markets. The main challenge however is that most farmers have not sold maize and oil seeds due to low producer prices. They are still holding produce in their granaries. This has led to farmers being cash strapped. Resources to be raised through farmers licensing. Amendment of the Act to address issues of levies was vital.

**Zimbabwe Commercial Farmers Union represented by Mr Obert Mamimini**

- The union was fairly prepared for this season
- The union has been working on modalities to get finance for the membership
- The union disseminated information through it structures
- Tobacco had already been planted
- ZCFU had secured 2, 284,600 tonnes Compound D and 1,877,45 tonnes Top Dressing fertilizer for its members under the EU STABEX ‘95 Fertilizer facility under the crop and commodity component. The fertilizers will be made available to members at 50% of the market price. Sale of fertilizers to beneficiaries should be starting early October.
The Union was also advising members of the available finance from banks. In addition to information dissemination, the Union is helping members with applications (cash flows, balance sheets etc).

Training of farmers on commodity technical issues is also in progress in anticipation of the oncoming season.

**Tobacco Industry and Marketing Board represented by Dr Andrew Matibiri**

- 65,000 hectares of tobacco had been grown
- 30,000 hectares of that tobacco is under contract arrangements
- 15,000 hectares has been grown under TIMB by communal, A1 farmers and cooperatives.
- 20,000 hectares was grown under own resources and banks
- A2 commercial farmers will this year receive funding through commercial banks
- The industry is looking after smallholder producers
- There has been a general improvement in the availability of electricity
- Other TIMB activities included decentralized grower registration to beat 31 October deadline and offering guidance and extension to growers in conjunction with other organizations (Farmers Development Trust, Tobacco Research Board, Growers’ Unions, Tobacco contractors).
- The inputs requested for the TIMB scheme – A1, communal and co-operative farmers was
  - 7,500 tonnes of compound fertilizer
  - 1,500 tonnes of AN fertilizer
  - Requisite chemicals

**Commercial Farmers Union**

CFU was concerned about preparations for the 2009/2010 season in view of the forecast of poor rains due to *El Niño*. They were also concerned about financing for inputs given that the tenure system had not come up with a bankable land tenure regime. There was need for a comprehensive agricultural financing plan which takes into account short, medium and long-term financing needs of farmers.

**Grain Marketing Board presented by Mr Zvidzai Makwenda – Deputy General Manager (GMB)**

- GMB had no longer the monopoly on maize and wheat as trade in grain had been liberalized
- Liquidity crunch in the financial sector had hampered grain purchases
- Most of the grain was still at farm level
- GMB had paid all farmers who delivered before July 2009
- Zimbabwe is a high cost producer and difficult to compete regionally so it is cheaper to bring in maize from South Africa.
The GMB looks at government subsidizing farmers as other governments are doing regionally and internationally.

Livestock Industry presented by Dr Mario Beffa

The livestock industry is well structured and represented by a number of stakeholders under the Livestock and Meat Advisory Council which provides a forum to discuss livestock issues. Livestock is represented by a number of species and a wide range of products and there is a need to recognize the importance of livestock in agricultural recovery as all too often agriculture is thought of only in terms of crops and fertilizers.

The industry expressed gratitude to the Ministry of Agriculture, especially the Department of Livestock Veterinary Services for their continued support of the livestock industry and their efforts to attain the current disease-free status that the country is enjoying. It is imperative that the Department of Livestock and Veterinary Services be resourced to sustain this status and pleasing to note the recent international review of the Department given its constraints.

All livestock industries have shown and continue to show remarkable recovery. Livestock production depends on:

a) Good genetics – i.e. a strong industry; currently severely weakened is showing signs of recovery and requires support and assistance.

b) Sound management currently compared by current situation requiring culling and devastating effects of veld fires.

Issues requiring attention included identification to rules of origin, cattle traceability and need for national development fund for fencing. He urged government and bankers to ensure that the CBZ $210m facility included livestock and that the special needs of livestock in terms of medium to long-term financing be taken into account.

Dr Beffa added that the industry supports Veterinary Service inspections of sources of origin of imports. However, there is a need to strengthen port health authority to ensure adherence of all protocols, especially veterinary concerns. Right now it was cheaper to import than to produce locally, thus the local industry is constantly under threat and needs to be safeguarded.

Presentation by Mrs Getrude Hambira, GAPWUZ

GAPWUZ (General Agriculture and Plantation Workers Union of Zimbabwe) has a role to promote the advancement of agricultural workers in the country. Among the concerns of the union include advocating for decent wages, better living conditions and effective uses of protective clothing. The union also has been promoting for an effective labour force on the farms. They have a primary membership of approximately 30,000 members. The union urged the employers to constantly guard against exploitation of the workforce especially in terms of wage negotiations.
Presentation by Mr Godfrey Buka, Cotton Ginners Association

The best practices on cotton production in the county have been on contract farming through respective ginneries. Inputs were distributed by these ginneries on time to registered farmers. Contractors employed agronomists and extensionists to provide technical backstopping in production. The challenges the sector had faced in the past years was on side marketing as a result of poor input support and poor support by the buyers. This season the sector intends to plant 425,000 hectares of cotton and seed distribution will commence in October, 2009. The common funding being promoted by the cotton sector will ensure better returns to both the producer and contractor and also discourage side marketing. The association is working together with the various unions on the issue of side marketing and contract farming. The growth of the cotton industry will only be effected through viability of production.

Discussant: Dr Ephrem Whingwiri, Agri-business Consultant

- The presentations by the farmers groups represent the foundations of a program on recovery programme with plans to move forward. State of preparedness is critical and farmer associations must have programs for memberships and beneficiaries. The stakeholders would have wanted to hear more on programs being carried out by the unions or commodity associations. What are the goals of the unions as well as commodity associations? He also expected conversations on markets as they are key in development of associations. What are the unions and commodity associations doing in terms of growth? Unions need to negotiate with markets as a program and transport produce. Of key is on how to use collective force for next season. This was not mentioned in the presentations and in light of what had happened this season it is important for unions to come with collective voices on various issues. The training of membership is critical in answering preparedness as it is part of a journey and has a bearing on sustainability. The current inadequacies of extension system – what are we doing as a Union/commodity association to negotiate with government and our farmers? How are unions using collective force, lobbying for assistance/subsidies from government? These are key issues in how farmers prepare and assist membership. There is need for institutional development to assist in governance and delivery issues. Markets must guide what we do as commodity associations and always to ask ourselves ‘Are we negotiating prices and markets for our membership?’

Discussion

- Poultry could be used as an instrument in developing rural areas. The programme on poultry development has seen exportation and re-importation of local breeds through symbiotic relations with countries such as Malawi and Zambia.
- The farmers did not say much in terms of their preparedness as they seem not to be prepared for this season
- ZNFU sounded very confident but there was need to further clarify and provide more details on state of preparedness
- ZFU – seems not yet in the race as there was less input in terms of preparedness
- ZCFU – almost there – that is what we expected to hear in terms to farmers groups preparations for the season
- On tobacco there was need to explain in detail how much of the irrigated tobacco had already been on the ground
— Hwange, NRZ, ZESA – as institutions that deal with farming issues the presentations sounded optimistic although indicating low levels of capacity
— Participants stressed the need for the farmer organisations to be more specific and clearly present their plans for the season. Participants hope that in future there would be a more technical presentation on the preparedness of the different unions. It was also important to clearly articulate the gaps existing in the different unions to enable service providers to meet the needs of farmers. These players needed to have been present at the conference.

DAY TWO

5.0 OFFICIAL OPENING ADDRESS BY THE MINISTER OF AGRICULTURE, MECHANIZATION AND IRRIGATION DEVELOPMENT, SENATOR DR JOSEPH MADE

Honourable Minister Made provided an official opening address in which he highlighted that long and medium term credit to farmers was vital for growth of agriculture and infrastructural development on farms. The Minister challenged the agricultural sector to produce more cost effectively so as to compete with regional and international markets. As a result of the land reform programme, the Minister felt that farmers had now access to better and more fertile land and must now strive for greater food security and industrial growth. Zimbabwe was also engaging with other international markets in Central and South America, Far East and the Middle East. He challenged the organisers to plan for such an important stakeholder consultation earlier in the year so as to make significant strides in agricultural planning. (The full speech by the Minister is available as an annex).

6.0 ADDRESS BY THE CHAIR OF THE AGRARIAN SECTOR TECHNICAL RESEARCH GROUP (THE AMBASSADOR OF THE ROYAL NETHERLANDS EMBASSY, MR JOSEPH WETERINGS
His Excellency The ambassador’s speech on Donor’s Challenges in a changed agricultural environment in Zimbabwe, highlighted how the environment had changed since the Ambassador came to Zimbabwe in 2006 when approximately 1,4 million people required food aid. He noted that the situation had since changed as there was liberalisation of grain trade providing incentives for farmers to produce for the market. He challenged government policies to be holistic as the agricultural sector was also depended on other ministries such as energy, water and infrastructure. The Ambassador noted that the donor community development had focussed on the provision of inputs in the smallholder sector so as to ensure food security. The donors had set aside $74 million for farm inputs as compared to $25 million the previous year. He highlighted on the need to ensure that land tenure issues were addressed so as to build investor confidence. (The full speech by the Ambassador is attached as an annex).

7.0 STATE OF PREPAREDNESS BY AGRICULTURAL INDUSTRY

Captains of the industrial sector that services agriculture gave their state of preparedness for the current season.

Presentation by Mr W Gopoza, Agro-chemicals industry

Mr Gopoza, representing the agrichemical dealers reviewed the structure of the industry which is based mostly on bulk imports of raw materials and processing and packaging locally. He noted that all the agrochemicals in the country were imported. There were 30 formally registered agro-chemical companies existing in the country. The current global and local financial crisis had seen the industry starved of capital and operating at between 10 and 30% of capacity. The industry also needs to upgrade its local packaging to meet international standards. They also faced challenges of illegal imports, fake products, sale of expired and unregistered products. These have threatened the integrity of the industry. However, despite these challenges the industry, believes that its registered membership, is well prepared to meet the needs of the coming agricultural season.

Presentation by Mr Nkatazo, Chairperson of the Seed Industry

Prior to 2000, the country only had 4 seed houses. Currently, Mr Nkatazo explained that there were 13 registered seed houses. The industry which was self sufficient prior to the year 2000, now sees shortfalls of up to 15 000 metric tonnes per season in its provision of grain seed. The industry has adequate skills including research and development capacity but is currently constrained by the liquidity crunch, isolation issues in grain seed production, credit inadequacy, fake seed, shortage of inputs for production, side marketing and low irrigation utilisation. The industry plans to produce 40,000 tonnes of maize seed and export the surplus. It also sees itself returning to the traditional means of seed distribution so that
seed is readily available on the market. He also sees the Malawi model borrowed from Zimbabwe of providing inputs, fertiliser and hybrid seed as the key to food security and recovery. The industry has also been cooperating with NGO’s in the importation of seed from Malawi, South Africa, Botswana, Zambia and Mozambique. Mr Nkatazo is a strong believer in smallholder agriculture. He narrated how in the previous years it was a shame (taboo) in both Shona and Ndebele societies to borrow grain (concept called kushuzha) as it was associated with laziness and poor foresight on the part of families. Mr Nkatazo would like to see the return of full granaries and farmers not begging for food from their neighbours.

**Presentation by Dr Richard Dafana, Fertilizer industry**

Dr Dafana appraised the meeting that Sable Chemicals produces ammonium nitrate whilst Zimphos concentrates on phosphate production. ZFC, Windwill and Omnia processes and distributes blends necessary for crop production. Currently the fertiliser industry was operating at below 30% capacity due to shortages of phosphate, nitrogen and challenges of distribution networks and working capital shortages. Sable Chemical was reported as being currently closed. The industry has an extensive distribution network across the country. The thrust of the fertiliser industry was to bring production back to the installed capacity and ensure that the country is self sufficient in its fertilizer supply. The industry still feels that it has a highly qualified workforce, local production of ammonium nitrate and high phosphate deposits. However, despite some challenges faced, the industry still feels that they can meet most of the season’s requirements adequately.

**Presentation by Mr B Madamba, Irrigation industry**

Zimbabwe has an irrigation potential of developing over 200,000 hectares of land. The irrigation companies, as represented by Mr Madamba are divided into three categories namely manufacturers, service providers and users of irrigation equipment. Users of irrigation equipment include newly resettled farmers, estates, communal farmers, large scale commercial farmers and many others. The industry has been facing challenges of capital shortages, brain drain to Australia and New Zealand, power (ZESA) outages and lack of demand for their products. As a result, they are operating at below 20% capacity. In one of the major manufacturing plants, the plant had not been running. The industry is well structured and would like see farmers being able to afford and demand irrigation equipment. There was need to come up with creative ways of ensuring that there was medium and short term finance for irrigation development. In light of the continued erratic rainfall, this is a sector worth developing.

**Presentation by Mr Kondo, Agricultural Mechanization**

Mr Kondo of the agricultural mechanisation agri-business organizations stated that his sector which facilitated the importation of farm machinery was also suffering from the credit crunch. The sector had been capacitating farmers to be able to utilise fully their equipment. The sector also reported that they were going to be able to service the farming community
this season through either importation of necessary equipment or repairs and maintenance of existing equipment. One of the challenges faced was to ensure that proper and suitable equipment was imported for use by farmers.

**Discussant: Kumbirai Katsande**

- Mr Katsande stated that fundamentally producers were ready to come and buy products. Prices should have been mentioned for it is a burning issue as prices such as producer prices are not being linked to commodity purchases. Cost effectiveness – whole economy cost competitiveness is a fundamental issue especially in the region. This matter needs to be addressed. The farmer is committed to his viability and can buy elsewhere. Leasing land – government must encourage farmers with excess land to be used by others. Let us encourage to utilize land to move forward and rebuild infrastructure together. Let us not be prisoners of development. Would have wanted presenters to discuss new ideas on how to do things differently. Let us not yearn for past – it will not come back. We need to do things better for the future. We need to accept that we are still in a serious economic crisis in our country and need to find strategic ways to move, recover and grow.

**Discussion included the following issues:**

- What proportions of farmers side market?
- Competitiveness set by industry – viability of farmers needs more assessment
- The issue of the Seed industry apparent resistance to open pollinated varieties (OPV’s) was raised. Why do you deny Zimbabwe OPV’s when other countries in the region still grow them? **Zimbabwe has been self-sufficient for 20-30 years.**

  **The general response by industry representatives was to continue emphasis on hybrids and not OPV’s.**

- Pricing and side marketing – has made industry almost die but companies would have invested – farmer lost out in USD/Zimbabwe dollar exchanges
- Prices of fertilizer only based on good agronomic practices
- Conference must contain building blocks of medium term planning
- Costs of production locally need assessment. For instance- Why is it that it costs 50% less to import onions from China than to purchase fertiliser locally produced?

**8.0 STATE OF PREPAREDNESS – AGRICULTURAL SERVICE INSTITUTIONS**

Presenters on extension and farmer training, livestock and veterinary services, irrigation, research and development and mechanization, gave elaborate presentations on the current status of extension and farmer training which was supposed to cover 1 200 000 communal, 75,697 old resettlement, 8,500 small scale, 800 large scale, 145,775 A1, 16,500 A2 and some peri-urban farmers.
However there was a common running thread of challenges around high staff turn-over, loss of experienced staff, dwindled funding and deteriorating or outdated facilities. The establishment in Extension for example stood at 82% except for Matabeleland North and South which stood at 37 and 32 %, respectively. In the department of livestock and veterinary services the situation was worse with an establishment of 280 vets and only 63 in post - lab techs 23, only 12 hold posts.

Operations were severely hampered by lack of transport making extension staff immobile, very limited stationery for training and absence of in service training. The outcry by all was for an increase in operational resources and some incentives to retain staff.

The sector recognized the following as priority areas: increased operational resources, staff retention scheme, improved information management, in-service staff training and improved transport.

The following summarises the individual agricultural service institutions papers and the discussions that followed:

**a) Extension and Farmer Training by J Gondo**

AGRITEX, Department of Agricultural and Extension Services has field and technical services divisions with a mandate to service communal, old resettlement, small scale, large scale, A1, A2 and urban farmers. AGRITEX is the mirror of the ministry with two extension workers in every ward. However the staff situation was very low with the situation critical in Matebeleland North and South where the department has not been able to retain staff due to migration to neighbouring countries.

The extension approaches were both group and individual and largely remained conventional and maybe not the best in a situation of dwindling funding and high staff turnover. There was therefore need to carry out research on alternative low-cost extension methods.

The department needed to retain its staff through: increased operational resources and prioritization, improved transport, improved communication systems, improved staff accommodation and resuscitation of in-service training. Highlights on extension presentation were as follows:

- AGRITEX is the mirror image of the Ministry
- Extension workers are present in all the rural wards of the country
- Soil and water, livestock not included in their mandate but extension workers expected to provide technical assistance
- Research on alternative extension methods in the face of dwindling finance.

**b) Research and Development, by Dr. N R. Gata**
The presentation by Dr Gata included past and current status, achievements, challenges and way forward and mandate to generate & provide research-based technologies, information, knowledge, and specialist services that facilitate increased sustainable crop & livestock production with the exception of tobacco, tea, sugar, forestry, pigs and veterinary Services. The current funding was untenable for successful research and development.

Despite the dwindling resources, the department has recorded some achievements among which are, demonstrated advantages of indigenous livestock species over exotic under local environments and high-merit animal genetic resources available to farmers (bulls, rams, bucks, crossbred dairy heifers) and seed and cuttings for forage and grass pasture.

The major challenges are funding, retention of skilled personnel and replacement of obsolete equipment. Research-based technologies are a cornerstone for agricultural development requiring a basket of financing strategies.

c) Livestock and Veterinary Services by Dr. S. Hargreaves

Dr. Hargreaves provided a challenge for discussion when he noted that while agriculture was the backbone of our economy, livestock was the backbone of agriculture and that while water is life, livestock was wealth. He gave the value of the livestock in the country as $2.7 billion. The department had four divisions namely, Veterinary Field Services, Veterinary Technical Services (Veterinary Public health / Diagnostics and Research), Tsetse Control Services and Livestock Production and Development.

The department had many challenges including: inadequate operational budgets (resources such as field, office, and laboratory equipment/reagents, vaccines, extension material, operational funds), inadequate transport and the high cost of hiring vehicles, inadequate communication systems and linkages within and without the Department, loss of skilled personnel and high number of vacant posts and high turnover of staff (e.g. establishment of 280 vets, only 63 in post - lab techs 23, only 12 in post), animal handling facilities inadequate (no races and head clamps at the majority of smallholder dip tanks), porous border posts (Only 7 Vet staff are active at border posts out of a requirement of 23).

For way forward, the following was emphasised among others: need to develop organised marketing of small stock, especially sheep & goats, restrict services to core functions (regulatory-control of specified diseases and pests), privatise services that are not of a public good, enter into public private partnerships to improve sustainability of services, mobility of staff needs to be improved, improve information management (resuscitate the central Information Management Unit) and increase services to expanding areas such as Aquaculture, Wildlife, Apiculture and Animal welfare.
d) Irrigation by Dr. E Chidenga

From its formation, the department has been involved in the rehabilitation of A1 and A2 schemes in areas that under-went land reform. Currently over 500 applicants are seeking government support to complete ongoing rehabilitation works. The second preoccupation of the department has been the utilization of existing dams in all provinces. However, not much work was done physically on any of these sites due to lack of funds.

The department is currently documenting existing schemes and feasibility studies of potential irrigation areas in Zimbabwe. One area of focus is on how some farming areas could benefit from the Zambezi River. The major limitation to irrigation development and sustenance is financing. Irrigation requires high capital injection and current development rates cost approximately US$3,000 per ha (international standards).

e) Mechanisation by Mr Muzamindo

The department’s mandate is to provide farmers with modern farming equipment as well as servicing them. Major areas of concern are training and extension, research and development and soil and water conservation.

The department would like to engage with private public sector initiatives. Financial packages remain a big bottleneck in the sector. Increase in human resource base to augment skilled manpower is necessary in the sector. The Mechanization unit has also trained farmers and their workers on use and maintenance of the equipment. People who needed to access equipment were encouraged to discuss their requirements with the department staff.

Discussant: Dr Isaiah Mharapara

- Dr. Mharapara recognized the diligent work that went into the papers and presentations. A starting point was to define which services were necessary for the recovery of agriculture. These included research and development, extension, engineering, policy formulation and monitoring, information management and monitoring and evaluation. The first emphasis was on strengths and need for efficient and affective monitoring and evaluation in an environment of dwindling finances to make sure one concentrates and puts more resources on what is critical. There was no room for ad hoc operations. There is need to see the importance of common visioning and guidance from the point of where the country is coming from and where they are headed but with limited resources, changing environment, changing clientele and demand for food in the SADC countries.

The greatest challenge to service providers was finance both in terms of amount and the release of that finance. One solution was to interrogate the levy system.
Inadequate transport, staff attrition and obsolete equipment and infrastructure are among issues that need urgent attention. Another solution was to bring back COFRE which made research and development client driven and more efficient because of its multidisciplinary approach. Also a system of mentoring of the greener staff by senior staff even with people outside who would be interested in a programme based approach would be an option worth pursuing. There is need to effect a monitoring and evaluation system to allow people to provide milestones on their progress in the recovery process.

**Discussion: The discussion raised more questions than answers.** The following questions were raised and further analysis is needed on this issues

- What is the current accepted farmer-extensionist ratio and what is prevailing in Zimbabwe?
- In training the new farmers in the use of equipment-- has this also translated to farm worker training?
- Some people got tractors for free but are charging exorbitant prices to others what is government doing about it?
- Will people who received equipment be expected to pay for it and how is government recovering this money?
- Irrigation is expensive and there is lack of skills in the sector what is being done about it?

**9.0 STATE OF PREPAREDNESS – DEVELOPMENT PARTNERS, MICHAEL JENRICH, FAO CONSULTANT**

The development partners provided a joint presentation involving 16 donors and 35 NGO’s through FAO. Michael Jenrich gave an overview of the work of various partners in meeting challenges of agriculture in the 2009/10 season and 2010/11 season. The FAO paid tribute to the stakeholders and partners who had assisted in ensuring assistance this season. Policies and pricing structures were important to ensure viability of agriculture. Farming unions were also being assisted by various partners so as to ensure their relevance. One of the programmes being promoted was on using commercial farmers as extension agents for smallholder farmers. The focus on cereals has been to ensure food security but other projects also being assisted included non cereal crops. Biggest problem in smallholder farmer production was poor management, low yields and declining extension support. Mr Jenrich noted that in Zimbabwe, contract farming had been misused and abused but noted that as a concept it was not a bad way of farmers ensuring market arrangements. For the 2010/10 season, there would be a move from the free input program towards the voucher
system as practised in Malawi. There would also be a strong approach in strengthening extension.

**Discussant: Lovegot Tendengu, Farmers Development Trust**
- Key to success in developing farmers’ needs is farmer training. The programme rests on the following pillars: land, manpower, capacity, inputs and markets. The success of productivity rests on the skill of the farmers. The multi-donor task force needs to further develop the various training centres that are scattered all over the country. Training is key in further developing the agricultural sector. The key challenge might be on provision of different programs for different target groups. There are many local partners on the ground who have the skills to provide to the smallholder sector. These need to be capacitated so that there is a win/win situation.

**Discussion focussed on:**
- Lack of land preparation; late planting, weed infestations as the key challenges affecting smallholder farmer production
- Post harvest processing, value addition would be a factor that helps in commercialising agriculture
- Unions require various forms of support for them to become effective to their membership
- Development partners were challenged to support the Zambezi water irrigation development project
- Packs that are promoted by FAO do not optimize production per unit area

**Responses by the other representatives of the donor community:**

**David Rohrbach, World Bank**
- $74 million being reported in the press was funding to agriculture coming from the full donor community and not from one agency
- Funding constraints have made it hard to tackle all issues that need growth and recovery
- Prioritizing of areas of focus have been difficult to manage.

**Marchel Gerrmann, Netherlands Embassy and Chairperson of ASTRG**
- His mission toured FAO farmer field schools which are demonstration plots and found them to empower farmers in terms of learning and sharing
- Timely preparation is key to good and sustainable harvests
- The programme had to be realistic as it had to prioritize issues of assistance due to budget constraints
- Stakeholders were urged to assist in prioritizing areas as well as get the sector to respond to recovery issues

**Dr Gaoju Han, FAO Representative to Zimbabwe**
- There is full commitment to recovery on the part of the development partners
- The challenge is on prioritization of the issues so as to effect agricultural growth and recovery. Nationally stakeholders must be part of the prioritization process.
RECOVERY AND GROWTH

A session on recovery and growth was conducted through group discussions. The groups were divided along the following sectors:

- Agricultural financing
- Inputs and outputs markets
- Agricultural services
- Food security
- Future needs for small scale farmers
- Agro-industry.

The group work assignment was based on questions listed below:

a) **Brainstorm and discuss what constitutes an overall strategy for recovering the agricultural sector in the next 2-5 seasons. Prepare a short statement of such a strategy.**

b) **Identify key issues for subsector and provide recommendations for the following sectors:**
   1. Farmers groups
   2. Government
   3. Donors
   4. Agro-industry

**Process:**
The groups were provided with 55 minutes to brainstorm depending on the sector and then asked to report back to plenary.

**GROUP 1**

**FINANCE**

Brainstorm what constitutes and overall strategy for recovering the agricultural sector in next 2-5 years, identify key issues for finance subsector and provide recommendations for farmer groups, government, donors and agro industry.

Considering the current constraints, failures and successes registered government needs to put in place a system of secure titles that are tradable and could be used for collateral that is tradable tenure. There was need to consider having a wider range of assets that could be used for collateral in both moveable and immovable as well as a legal regulatory framework by financial institutions and government. The current 99 year lease is not tradable nor does it allow sub leasing.

With regards farmer groups, it was important to develop credit worthiness and lobbying skills. Government was to ensure land tenure and an enabling environment and provision of utilities like electricity and water. Solving the land title issues was a prerequisite to the unlocking of finance and attracting investment. Development partners, industry and agro
industries were to chip in with alternative finances, appropriate technology, equipment, research, complementary extension, skills development and capacity building.

**Definition of a successful Agriculture season:** Get agricultural system working to enable production of commodities as per set targets to meet food security at household/national level

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<tr>
<th>Issue</th>
<th>Action by who</th>
<th>What action</th>
<th>Outcome</th>
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<td>Policy/Politics</td>
<td>Government</td>
<td>Lobby</td>
<td>Kick start</td>
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<td>Tenure/Land audit</td>
<td>Politics/Civic society</td>
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<td>Attitudes</td>
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<td>Capacity Building</td>
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<td>Conscientise</td>
<td>Lobby</td>
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<td>Agricultural</td>
<td>Workers/Labour</td>
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<td>Institutions</td>
<td>Vets: Unions: Association FDT; TRB; TIMB; Research; Ext</td>
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<td>Finance</td>
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<td>Inputs &amp; Markets</td>
<td>Agro-dealers</td>
<td>▪ Train personnel in farming/extension</td>
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<td>Commodity users</td>
<td>▪ Rehabilitate institutes</td>
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<td>▪ Staffing</td>
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<td>NEC</td>
<td>▪ Realistic wages</td>
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<td>Government</td>
<td>▪ Mechanise/chemicals</td>
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<td>▪ Enabling environment</td>
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<td>▪ Criminalise illegal activities</td>
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<td>Climate</td>
<td>Government</td>
<td>▪ Water conservation</td>
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<td>(assembling droughts)</td>
<td>Farmers</td>
<td>▪ Rehabilitation of irrigation</td>
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<td>Agribusiness</td>
<td>▪ New irrigation</td>
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<td>Contractors</td>
<td>▪ Planting dates</td>
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<td>Chiefs</td>
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**Group 2 (Session 8) Inputs and Outputs markets**

Strategy: To capacitate farmers to carry out as a business, government to provide enabling policies and donors to enhance this development process.

**Group 3 (Session 8) Overall Strategy: Agricultural Services**

1. To be food secure
2. To produce a surplus for export and earn foreign currency
3. Have a vibrant agro-industry which generates jobs and wealth
4. Develop a viable and sustainable agricultural industry compatible with the imminent climate change
5. To be food secure with surplus for export through sustainable and industrialized agricultural sector

**Group 4 (Session 8) Food Security**

The future needs for smallholder (commercial) farmers – SHCF

- Potentially market oriented
- Producing a surplus of food and/or cash crops and livestock
- Profit oriented
- Farming as a business

Where are they – communal, small scale Resettlement (A1 and A2)

<table>
<thead>
<tr>
<th>Poor 2009</th>
<th>Rich farmer in 2011</th>
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Problem of small scale farmers

- Low productivity
- Some are not able to feed themselves – different strategy
- Lack of credit

**Strategy for Agricultural Recovery**

1. Price support - phased
   - targeted
   - market support
2. Targeted input support
3. Training of farmers
4. Infrastructure development: Institute and physical
5. Appropriate technology
6. Agro-processing
7. Improving access to credit
8. Ministry of AMID for commercialization

a) Strategy for Supporting farmers’ access to input and output markets
   - Voucher system: who is paying?
   - Microfinance
   - Targeting criteria
b) Pay a premium over free market prices – who is paying?

Training of farmers

- How to produce competitively
- How to negotiate contracts and banks
- How to prepare budgets and cash flows
- Ethics: Agribusiness ethics
- Marketing and trade standards and grading system

Development of farm infrastructure for commercialization on small scale farmers

Appropriate technology for commercialization

- Research and development
- Technology dissemination
- AGRITEX – Private – NGO partnership
- Building capacity of A113

Agro-processing Development for commercialized

- Promote out-grower scheme
- Partnerships
- Growing quality crop as throughput to the proc. comp.

1. Farmer organizations
   - Focus on commodity associations
   - Capacity building
   - Organizational development
   - Agribusiness oriented
   - Membership controlled
   - Legal entity

   Functions: partner for development
- Organization for training
- Organization for marketing

2. Government
- Strengthening capacity of Ministry of Agriculture, Mechanization and Irrigation Development
- Embrace Private-Public-NGO partnership for development
- Sustain an enabling policy environment
- Protection of property rights and security

3. Donors
- Consultations with local stakeholders
- Complement government efforts in development project planning
- Target both vulnerable and commercial-oriented farmers
- Non-discriminatory in targeting partnerships for development

4. Agro Industry
- Acknowledge small scale farmers as business partners
- Promote appropriate technology for small scale agricultural development
- Viable prices for smallholder agricultural development

Discussion for future approaches to the conference

- There is need to have a commodity councils/approach for the next conference
- What not to say next year: Government has not done so and so for us as government is not a good farmer. Stakeholders must give government its appropriate role that of creating an enabling environment
- Can we have such a vibrant conference in early April-May
- Consultation of key players ahead of time is necessary
- Include students and youths
- Assessment of markets needs to be done
- Futuristic agriculture – we need to explore beyond now.

10.0 VOTE OF THANKS BY CHAIRMAN OF ASTRG, MARCHEL GERMMANN

The Chairperson of the Agrarian Sector Technical Review Group, Marchel Germmann from the Royal Netherlands Embassy provided a vote of thanks. He paid tribute to the Ministry for
planning the conference to involve stakeholder groups. He thanked the various stakeholders, partners, agri-business and farmer groups who had left their busy schedules to be part of the consultation.

11.0 CLOSING REMARKS BY THE PERMANENT SECRETARY IN THE MINISTRY OF AGRICULTURE, MECHANIZATION AND IRRIGATION DEVELOPMENT, MR NGONI MASOKA

The Permanent Secretary to the Ministry of Agriculture, Mechanization and Irrigation Development provided the closing remarks to the conference. He thanked all of stakeholders that had supported the Agriculture National Conference. The attendance had overwhelmed him. Mr Masoka said that he had not thought that the conference held in Harare would end with all people being present such as the civil society, agri-business and donor community. The Ministry would like to plan for such consultation earlier on in the year. Issues such as CAADP will be followed up with stakeholders. The Ministry also intended to engage various sectors and we believe this would become a better system for the nation to invest in the sector. He thanked the support he received from The Permanent Secretary in the Ministry of Lands and Rural Resettlement Mrs. S. Tsvakwi who was present at the entire conference, and the Permanent Secretary of the Ministry of Women Affairs, Gender and Community Development, Dr Utete-Masango who also provided the necessary input and technical backstopping. He expressed that the nation was not in a usual situation where people were comfortable. He reminded the group that they were coming from a situation in which people knew where they were and where they would like to be. The sector had a lot of potential. The key was on reviving all agricultural sectors – commodities, tobacco, livestock, etc as it is all about cooperation for growth.

12.0 WAY FORWARD - SYNTHESIS OF BROAD ISSUES ARISING FROM GROUP DISCUSSIONS AND CONTRIBUTIONS

The holding of an Agricultural Consultative Conference is one of mechanisms for stakeholder consultation. Other approaches could be (i) commissioning position papers on identified priority areas or issues and sharing the findings among the stakeholders; (ii) organization of a number of retreats to clarify policy position and achieve a common voice and position on
key issues; (iii) organization of a number of strategic seminars with the stakeholder, Government, civil society, the private sector, and other organizations; and (iv) dissemination of analytical findings and strategic positions to the Government, the stakeholders and development partners through the media, including policy briefs on current topical issues; (v) establishing agencies or stakeholder consultative forums such as the national food security and nutrition council in which various stakeholders will be represented; (vi) conducting periodic public perception surveys on policy issues and issues of agricultural development concerns. It is recommended that a framework for stakeholder consultation must be developed that would identify stakeholders, the appropriate timeliness for consultation, and the methodology and extent of the consultation needed.

1. Given that the market is now liberalized, the stakeholder felt that the farmers must take the lead and be proactive for their benefit.
2. Conference was overdue but it must be done early in the year for planning purposes so that it can guide the planning.
3. A conclusion to the land issue for all farmers concerned so that there is security in tenure.
4. Some of the outcomes from various sectors should be a basis for engagement with the donors.
5. Stakeholders must also input into policy processes such as CAADP.
6. Finance institutions need to come up with financial packages that meet the needs of farmers.
7. There is need to build capacity of farmers through training.
8. Consistent and clear policy information from government for all stakeholders is required.
13.0 ANNEXES
13.1 CONFERENCE PROGRAMME

MINISTRY OF AGRICULTURE, MECHANIZATION & IRRIGATION DEVELOPMENT

National Agricultural Conference to be held
at Meikles Hotel
30 September – 1 October 2009

Goal: To review the current status of the agricultural sector and map out a strategy for agricultural recovery in the short to medium term.

Objectives:

4. To review current status of the agricultural sector in Zimbabwe
5. To get stakeholder participation and input into formulating an agricultural strategy
6. To provide medium term strategies necessary for the growth of agriculture

The Conference in Summary

Day 1: 30 September 2009

Morning

• Session 1: Setting context
• Session 2: Technical papers with the current status of agriculture

Afternoon
• Session 3: Stakeholder inputs into analysis of current status

Day 2: 1 October 2009

Morning:

• Session 4: Official opening; State of preparedness by service institutions
• Session 5: State of preparedness by farmers
• Session 6: State of preparedness by development partners

Afternoon:

• Session 7: Stakeholder dialogue on recovery and growth plans
• Session 8: Close
## DETAILED PROGRAMME

### DAY 1

**30 SEPTEMBER 2009**

<table>
<thead>
<tr>
<th>TIME</th>
<th>TOPIC/PROGRAMME</th>
<th>PRESENTER</th>
<th>OBJECTIVE</th>
<th>TYPE OF SESSION</th>
</tr>
</thead>
<tbody>
<tr>
<td>0845-0855</td>
<td>Welcome Remarks</td>
<td>Mr N. Masoka, Permanent Secretary, Ministry of Agriculture, Mechanisation and Irrigation Development</td>
<td></td>
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</tr>
<tr>
<td>0855-0915</td>
<td>How Conference will run</td>
<td>Mandi Rukuni</td>
<td>• Explain how the 2 days will run and methods used.</td>
<td>Plenary</td>
</tr>
<tr>
<td></td>
<td>Self Introductions</td>
<td>Mabel Hungwe</td>
<td>• Introduce facilitators</td>
<td></td>
</tr>
<tr>
<td>0915-0930</td>
<td>Presentation by NEPAD</td>
<td>Dr B Giyose</td>
<td></td>
<td></td>
</tr>
<tr>
<td>0930-1015</td>
<td>Update on the CAADP process and presentation of the Zimbabwe Compact</td>
<td>Ministry of Agriculture, Mechanization and Irrigation Development</td>
<td></td>
<td></td>
</tr>
<tr>
<td>1015-1030</td>
<td>Tea Break</td>
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</table>

### SESSION 2: CURRENT STATUS OF AGRICULTURE

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## National Agriculture Stakeholders Conference
30 September – 1 October 2009
(Final Report)

<table>
<thead>
<tr>
<th>Time</th>
<th>Session</th>
<th>Presenter/Contributor</th>
<th>Description</th>
<th>Location</th>
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</thead>
<tbody>
<tr>
<td>1030-1115</td>
<td>Discussion</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1115-1130</td>
<td>Baseline Survey</td>
<td>Mr V. Vudzijena</td>
<td>To identify information gaps and challenges facing the agricultural sector and recommend the way forward.</td>
<td>Plenary</td>
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<tr>
<td></td>
<td></td>
<td><em>Discussant: Dr R Mano</em></td>
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<tr>
<td></td>
<td></td>
<td><em>Mr Taffs</em></td>
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<tr>
<td>1130-1145</td>
<td>Discussion</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1145-1200</td>
<td>Household &amp; National Food Security</td>
<td>Mr S. Pazvakavambwa</td>
<td>To review the challenges facing household and national food security and recommend policy options.</td>
<td>Plenary</td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>Discussant: ZFU/NFAZ</em></td>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
<td>ZFU: Mr B Mukwende</td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>NFAZ: Mrs Chinamasa</td>
<td></td>
<td></td>
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<tr>
<td>1200-1215</td>
<td>Discussion</td>
<td></td>
<td></td>
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<tr>
<td>1215-1230</td>
<td>Inputs and Outputs Markets</td>
<td>Dr C. Sukume</td>
<td>To review the challenges in inputs and outputs markets and recommend possible policy options.</td>
<td>Plenary</td>
</tr>
<tr>
<td></td>
<td></td>
<td><em>Discussant: a) Mr Nkatazo, Chair, Seed Association</em></td>
<td></td>
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<tr>
<td></td>
<td></td>
<td>b) Mr Mandizha, CEO GMB</td>
<td></td>
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<tr>
<td>1230-1245</td>
<td>Discussion</td>
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<tr>
<td>1245-1300</td>
<td>Agricultural Financing for Small and Large Scale Commercial Agriculture</td>
<td>Dr Mangudya</td>
<td>To review the challenges in agricultural financing and recommend possible policy options.</td>
<td>Plenary</td>
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</table>
## SESSION 3: STAKEHOLDER INPUT INTO ANALYSIS OF CURRENT STATUS

<table>
<thead>
<tr>
<th>Time</th>
<th>Activity</th>
<th>Facilitators</th>
<th>Breakaway</th>
</tr>
</thead>
<tbody>
<tr>
<td>1415-1500</td>
<td>Group discussion</td>
<td>Facilitators</td>
<td>Groups to discuss and complement the technical analysis on status of agriculture</td>
</tr>
<tr>
<td></td>
<td>• What do you think are the priorities for action in order to have a successful 2009/2010 agricultural season?</td>
<td></td>
<td>Breakaway</td>
</tr>
<tr>
<td></td>
<td>• What are the priorities for a successful 2010/11 season?</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>• What are the roles of key players in order to have a successful recovery of agriculture?</td>
<td></td>
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<tr>
<td>1500-1600</td>
<td>Group presentations</td>
<td>Facilitators</td>
<td>Present results</td>
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<td></td>
<td></td>
<td></td>
<td>Plenary</td>
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### SESSION 4: STATE OF PREPAREDNESS BY FARMERS

**TEA BREAK**
<table>
<thead>
<tr>
<th>Time</th>
<th>Event</th>
<th>Discussion</th>
<th>Panel</th>
</tr>
</thead>
</table>
| 1615-1715 | Farming Unions               | • CFU  
• ZCFU  
• NFAZ  
• ZFU  
• Farm-workers - GAPWZ  
• Cotton – Mr Buka  
• Tobacco – Dr Matibiri  
• Grain – Mr Makwenda  
• Horticulture – Mr B Sandamu  
• Livestock – Mr Beffa  

*Discussant: Dr E Whingwiri*  
• To review the status and vision of the various unions in terms of their future role in agriculture.  
• To review the challenges being faced by the various commodity associations and map the way forward.  
<p>|        | Commodity Associations       |                                                                                             |        |
| 1715-1735 | Discussion                   |                                                                                             |        |
| 1800hrs | COCKTAIL                     |                                                                                             |        |
|         | END OF DAY                   |                                                                                             |        |</p>
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<tr>
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<th>PROGRAMME</th>
<th>PRESENTER</th>
<th>OBJECTIVES</th>
<th>SESSION TYPE</th>
</tr>
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<tbody>
<tr>
<td>0830-0840</td>
<td>Summary of previous day</td>
<td>Facilitator</td>
<td></td>
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<tr>
<td>0905-0930</td>
<td>Donor Challenges in a Changed Agricultural Environment in Zimbabwe</td>
<td>Mr Joseph Weterings Netherlands Ambassador</td>
<td></td>
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</tr>
<tr>
<td>Time</td>
<td>Session Title</td>
<td>Speaker(s)</td>
<td>Note</td>
<td>Panel</td>
</tr>
<tr>
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<td>-------------------------------------------------------------------------------</td>
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</table>
| 0930-1010 | a) Extension and Farmer Training in a smallholder dominated environment.  
b) Research & Development  
c) Veterinary/Livestock Services  
d) Irrigation  
e) Mechanization | Mr J. Gondo  
Dr N. Gata  
Dr S. Hargreaves  
Dr E. Chidenga  
Mr Muzamindo  
*Discussant: Dr I. Mharapara* | To review the challenges in agricultural services delivery and map the way forward. | Panel |
| 1010-1030 | Plenary Discussion                                                             |                                                                            |                                                                      |       |
| 1030-1100 | TEA BREAK                                                                     |                                                                            |                                                                      |       |
| SESSION 6: STATE OF PREPAREDNESS BY AGRO-INDUSTRY |                                                                            | |                                                                      |       |
| 1100-1140 | Agro-Industry                                                                  | • Fertilizer – Dr Richard Dafana  
• Seed – Mr Nkatazo  
• Agro-Chemicals–Mr B Mutandiro  
• Agric-mechanization– Mr Kondo  
• Irrigation companies – Mr Madamba  
*Discussant: Mr K Katsande* |                                                                      | Panel |
<p>| 1140-1200 | Discussion                                                                     |                                                                            |                                                                      |       |</p>
<table>
<thead>
<tr>
<th>Time</th>
<th>Session Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1200-1240</td>
<td>SESSION 7: STATE OF PREPAREDNESS BY DEVELOPMENT PARTNERS</td>
<td>Development Partners FAO Discussant – Mr Lovegot Tendengu To get the donor perspective on Zimbabwean agriculture and review the state of preparedness and coordinated efforts by development partners.</td>
</tr>
<tr>
<td>1240-1300</td>
<td>Discussion</td>
<td></td>
</tr>
<tr>
<td>1300-1400</td>
<td>LUNCH BREAK</td>
<td></td>
</tr>
<tr>
<td>1400-1445</td>
<td>SESSION 8: STAKEHOLDER DISCUSSION ON RECOVERY &amp; GROWTH</td>
<td>Group work a) Agricultural Financing b) Inputs &amp; Outputs Markets c) Agric. Services d) Food Security e) Future Needs for Small Scale f) Commercial Farmers g) Agro-industry Discussion on how to consolidate a comprehensive recovery and growth plan.</td>
</tr>
<tr>
<td>1445-1545</td>
<td>Group report</td>
<td>Report back Plenary</td>
</tr>
<tr>
<td>1545-1600</td>
<td>TEA BREAK</td>
<td></td>
</tr>
<tr>
<td>1700-1715</td>
<td>SESSION 9: CLOSING</td>
<td>Summary on follow up a) Conference in February b) Concrete plans for future – 2010-11</td>
</tr>
<tr>
<td>1715-1730</td>
<td>Closing Remarks</td>
<td>Chairperson of the ASTRG Plenary</td>
</tr>
</tbody>
</table>
## 13.2 Participants List

<table>
<thead>
<tr>
<th>NAME</th>
<th>DESIGNATION</th>
<th>ORGANISATION</th>
<th>CONTACT NUMBER</th>
<th>EMAIL ADDRESS</th>
</tr>
</thead>
<tbody>
<tr>
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<tr>
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<td></td>
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13.3 SPEECH ON THE OFFICIAL OPENING OF THE NATIONAL AGRICULTURAL CONFERENCE BY HONORABLE SENATOR DR J.M. MADE (MP), MINISTER OF AGRICULTURE, MECHANIZATION AND IRRIGATION DEVELOPMENT ON 30 SEPTEMBER – 1 OCTOBER 2009, MEIKLES HOTEL, HARARE

Permanent Secretaries (Senior Government Representatives)
His Excellency the Netherlands Ambassador, Mr Joseph Weterings
Bank Representatives and CEOs
Captains of Industries and CEOs
Farmer Unions
Heads of Parastatals
Commodity Associations
Invited guests
Comrades and Friends

It is my honour and privilege to come and officiate at this National Agricultural Conference.

Agriculture is a dominant and significant sector of Zimbabwe’s economy, contributing between 16 to 20% of the country’s Gross Domestic Product (GDP). It provides income and livelihoods for over 70% of the country’s population and is a major foreign exchange earner.

In addition to that, the sector supplies some 60% of raw materials needed by the manufacturing sector.

In the context of this conference we have an opportunity to reflect and consider issues in the Agriculture sector in order to formulate a strategy that will stabilize and grow this vital sector. I must however lament the delay in the holding of this conference because we are already into the 2009/2010 agriculture season, the outputs of this conference could have come earlier to help us better plan for this season.

Zimbabwe’s Agriculture major challenge remains that of raising finances to support the agriculture industry which manufactures inputs. Farmers who purchase and use the agriculture inputs and traders and marketers who purchase farmer outputs (crops and livestock) products.

It is my hope that this conference devotes adequate time and brings out suggestions as to how we can resolve the issues of generating finances where the traditional sources of external financing are closed due to sanctions and the Global Financial Crises.

Firstly, Zimbabwe has to look at its internal capacities through cost effective ways of managing limited resources.

Secondly, Zimbabwe has to look at inquiries coming from friendly countries wishing to finance industry and farmers involved in crop and livestock production.
Countries in Central and South America, Middle East, Asia and China and Russia are deepening their enquiries in the food and industrial crops and livestock production. In this regard Zimbabwe must seize on the opportunity to negotiate financing from these regions and countries. Zimbabwe’s agriculture sector industry and farmers however must aim to produce cost effectively.

Our farmers’ products must compete at the regional and international levels.

This conference as you deliberate on our Private and Public sector institutions preparedness, you must remain mindful of the need to increase production and productivity in the agriculture sector.

Zimbabwe’s agriculture potential in particular land reform whose benefit has been better land to our people, this land has better soils and rainfall must be sustainably exploited for greater food security and industrial growth, employment creation, better farmer incomes and economic stability and growth.

As I conclude and set the tone for the conference, I would like to emphasise that my main task is to listen and review your suggestions in order to be effective in policy implementation and review. I have chosen as my main thrust the issue of credit and financial resources mobilization as the major task for our Agriculture sector in the face of sanctions and the Global Financial Crises.

The process of promoting investment in agriculture requires financial services and credit to give farmers working and fixed capital and to cushion them against risk. Current resource constraints demand that other players particularly the private sector play their part.

Availability of credit, in particular medium and long term, to farmers is one of the most important ingredients to improved and sustained productivity.

In the past, and even now, credit has been made available largely on a short term basis but there is need for greater provision of medium to long term finance which will allow infrastructural development on farms especially with regards to dam, irrigation, farm handling facilities, rural roads, horticulture and livestock development.

With these few remarks ladies and gentlemen, I declare this Conference officially opened.

I thank you, Ngiyabonga, Ndinotenda
“CHALLENGES IN A CHANGED AGRICULTURAL ENVIRONMENT IN ZIMBABWE”

It is with great pleasure that I am addressing you today at this very important occasion. This conference provides a platform for all stakeholders to dialogue on the challenges facing the agricultural sector, and also to come up with options to revitalize the agricultural sector so that it can regain its position as the backbone of Zimbabwe’s economy.

I am asked to give a speech about “Donor Challenges in a Changed Agricultural Environment in Zimbabwe”. Let me start with the changed agricultural environment in Zimbabwe today. After that I will elaborate on some of the challenges that need to be addressed for agriculture to reassume its role as a major engine of economic and social development. Lastly, I will address the possible role of the donors in a recovery scenario.

Changed Environment

I came to Zimbabwe in 2006, and in that year approximately 1,4 million people were receiving food aid. At that time agricultural production and food security were deteriorating steadily, culminating in food relief being provided to nearly 7 million people by January this year. With the start of the inclusive government we have seen some encouraging policy reforms. These reforms include the adoption of a multicurrency system, the liberalization of agricultural marketing (so that producers can sell their commodities on the open market at market prices and the removal of the GMB monopoly as a grain purchaser) and the relaxation of price and exchange controls. With these reforms at least incentives to produce have returned.

Challenges

There are many challenges in the agricultural sector and without being exhaustive, let me address some of the key challenges that include: inadequate policies, food insecurity and the general collapse of agricultural support services, the land tenure issue and the lack of respect for property rights and bilateral investment agreements.

Inadequate policies

When we talk about inadequate policies, we need to consider this holistically since the agricultural sector is also dependent on policies of other Government Ministries for its performance. For instance electricity is needed to irrigate the winter wheat, road infrastructure is needed to provide access to markets, etc. These policies, while crucial to the performance of the agricultural sector, are not under the control of the Ministry of
Agriculture. This calls for the need to have an overall strategy that looks at all policies in an integrated manner. We all know that the macroeconomic environment (characterized by high interest rates, hyperinflation, widening fiscal deficits, foreign exchange shortages) has contributed to the decline in agricultural production and productivity. In addition the agricultural sector policies on controlled markets and prices for agricultural inputs and outputs have also negatively affected agricultural production. There is also need for the development of policies that make the farming in the rural environment attractive for farmers by developing the necessary infrastructure (schools, hospitals, water supply, and communication system) and production (good extension service, availability of inputs and access to markets and information).

Under the Inclusive Government, addressing the land issue as well as rebuilding the agricultural sector are the main priorities as highlighted in the Global Power Sharing Agreement as well as the Short Term Economic Recovery Programme (STERP). Under this programme it is a clear priority of the Zimbabwean Government to restore food security and reduce the increasing number of people relying on food aid. In the short term, Government’s focus is on stimulating production to meet national food needs. In the medium to long term, critical policy issues include land reform (land audit, restoration of land rights and security of occupation) and promotion of the shift from area expansion to productivity enhancement measures.

**Food insecurity and the collapse of the agricultural support services**

Food insecurity remains a critical challenge for Zimbabwe. A number of constraints have resulted in a decline in smallholder cereal yields and production over the last decade. The maize yields of the communal farmers (who used to produce the bulk of the crop in the country) have declined. This decline has been attributed to: short supply and inability of farmers to afford inputs, ineffective extension support, weak organisational capacity among farmers, declining soil fertility, among other things. For this current agricultural season, the focus has been on distribution of inputs, most of it provided for free. In the coming year, there will be need to revitalize the manufacture of these inputs and to re-establish markets for their sale. Additionally, there will be a need to develop innovative input supply systems in order to avoid farmer dependency on free inputs for instance through the promotion of contract farming and wholesaler retailer-links.

However, there is evidence that access to inputs alone is not adequate, as farmers need adequate training and extension services in order to achieve the desired yields. This calls for the need to strengthen the agricultural extension services, both in the public and private sector so that they can deliver the necessary training and advisory services. On-farm training and the promotion of the master farmer needs to be revitalized in order to develop the smallholder sector. In addition, ways should be developed for the smallholder sector to tap into the skills and experience that was built by the large scale commercial farmers over decades.
Access to agriculture financing also remains a major constraint. This calls for other players, particularly the private sector, to become more actively involved in the provision of agricultural finance. However, banks need to develop credit schemes that are suitable for smallholder farmers. Inadequate agricultural financing could remain a major challenge until the security of tenure has been adequately addressed.

Land tenure

Under the Inclusive Government, addressing the land question as well as rebuilding the agricultural sector are main priorities as highlighted in the Global Power Sharing Agreement (GPA) as well as in the Short Term Economic Recovery Programme (STERP). In the GPA, the three political parties agreed, among other things, to conduct a land audit, to allocate land equitably, to address the issue of compensation within the land reform process, to restore the productivity of all agricultural land and to secure international support to finance the land reform programme. It will be important to address the land tenure and the ongoing disruption of farming operations in the commercial sector. These disruptions are not conducive to long term investments, they raise doubts about the commitment to reform and they affect farm workers in negative way. A credible tenure policy and its speedy implementation will be essential for building confidence and allowing investment on land as well as facilitating agricultural financing.

BIPPA’s (bilateral investment promotion and protection agreements)

Zimbabwe is a sovereign country, but like any other country in the world Zimbabwe needs international engagement and needs to compete for international investment. In order to invest in a country the prospective investor needs confidence that property rights and bilateral agreements to protect these, will be fully respected.

Donor support

Various donors are actively providing support to the agricultural sector. The developing trend is the shift by donors from humanitarian support towards early recovery/transition aid. For instance donors trebled the amount that was made available for the provision of seed and fertilizer for the current agricultural season. For this coming agricultural season, donors have made available USD74 million for the support of farm inputs (in the form of seed and fertilizer) distribution and extension as compared to the USD25 million that was made available last year. With the combined donor support the food security of more than 685,000 households will be improved. Later on today FAO will give a presentation on the State of Preparedness of Donors and our support for the 2009 and 2010 season and beyond.

Donors are willing to reengage even further, but this is linked to the reengagement process between the government and donors. I refer for example to recent talks between the EU-
Troika and the Zimbabwean government in the framework of the Article 8 dialogue of the Cotonou process. This dialogue was formally started by the Prime Minister in Brussels in June of this year and should be followed up by a proactive and substantive dialogue here in Harare.

Donors have also contributed resources to the analytical Multi Donor Trust Fund that was established to increase knowledge on key development challenges facing the country to be used by donors and government in the preparation for economic recovery and development. The MDTF has seven Technical Review Groups among which the Agrarian Sector Group, chaired by the Netherlands. Some of the studies that were discussed during the conference namely: “The Baseline Survey” and “The National and Household Food Security Study” were financed by this group. In addition, there are several other studies that have been commissioned and these studies also require input from the stakeholders in this room after they are finalized. These studies, with the input of stakeholders, will be expected to come up with policy options for Government consideration on how best to advance the agricultural sector in Zimbabwe.

Finally, I know there are differences of opinion on the past, and I am quite sure that we will never agree completely. The deliberations at this conference in our view should about the future of the agriculture in Zimbabwe. So let us feel free to make our contributions for the benefit of the development of the agricultural sector in Zimbabwe.

It is also my hope that the outcome of this conference will provide entry points and strategic direction for the Government of Zimbabwe to refine and implement genuine policies in agriculture and land reform.

I thank you.
### 13.5 Conference Evaluation

#### Rating
1 = Poor
2 = could have been better
3 = average
4 = good
5 = excellent

**Total respondents: 91**

<table>
<thead>
<tr>
<th>Questions</th>
<th>Poor – better</th>
<th>Could be better</th>
<th>Average</th>
<th>Good-Excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. How do you rate the organization in general?</td>
<td>5</td>
<td>6%</td>
<td>14</td>
<td>15%</td>
</tr>
<tr>
<td>2. How do you rate the venue of the conference?</td>
<td>0</td>
<td>0%</td>
<td>8</td>
<td>8%</td>
</tr>
<tr>
<td>3. Relevancy of the conference in relation to your present work</td>
<td>1</td>
<td>1%</td>
<td>3</td>
<td>3%</td>
</tr>
<tr>
<td>4. Usefulness of the information that was shared during the conference</td>
<td>3</td>
<td>3%</td>
<td>12</td>
<td>13%</td>
</tr>
<tr>
<td>8. Degree of two-way flow of information exchange between the speakers and the stakeholders</td>
<td>4</td>
<td>4%</td>
<td>25</td>
<td>28%</td>
</tr>
<tr>
<td>9. Management of debates</td>
<td>5</td>
<td>6%</td>
<td>18</td>
<td>20%</td>
</tr>
<tr>
<td>10. Was enough time allocated to presentation of the topics?</td>
<td>Yes</td>
<td>46%</td>
<td>No</td>
<td>54%</td>
</tr>
<tr>
<td>11. Did you feel that you made an input as a stakeholder? If yes, in what way?</td>
<td>Yes</td>
<td>93%</td>
<td>No</td>
<td>7%</td>
</tr>
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</tbody>
</table>
Question 5: Which session did you find most useful? Why?

- Session 8: Stakeholders are key. They should decide their future if government policy has changed.
- State of preparedness of farmers and agro-industry. Some understanding of current position.
- Good to see all stakeholders sharing comments
- Session 5 and 6
- Session 8: Networking, sharing ideas and team work.
- Session 2 on technical papers as it analyzed current status of agriculture from different perspectives
- All sessions were equally important as it set the conference to an even starting point
- What are the roles of key players in order to have a successful recovery of agriculture?
- Discussion on how to consolidate comprehensive recovery and growth plan
- Session on how we can focus agriculture recovery
- Group discussions – everybody participated and there was consensus on issues that were put across openly
- Funding of agriculture – this is key to success of the sector
- Inputs – this will make production tick in 2009/10 and perhaps 2010/11
- Current status of agriculture – it gave me a true picture of challenges that I have to deal with in project planning and management
- Presentation of stakeholder groups showed the status as of now
- Final session – summarizing was good
- Livestock session good and informative
- Stakeholder discussion on recovery and growth allowed for more input from stakeholders
- Household food security presentation was very frank and an eye opener to shortcoming in agricultural industry
- Agro-industry session, discussion on inputs supply situations and challenges
- State of preparedness by the agro-industry critical to success of agricultural season
- Stakeholder/donor interactions
- Participation in group sessions was effective two-way system and creative
- Development partner session was insightful, informative and problem oriented it addressed REAL issues instead of skirting around them
- Group work filled the gap left by presenter
- Preparedness by service sector was well presented.
- The last session managed to touch issues that had been left hanging.
- The session on household food security gave an analytical analysis of what went wrong in the country’s policies.
- Virtually all sessions were useful.
- Group sessions: facilitated stakeholder participation and got people to share different views at different levels of stakeholder experience.
- State of preparedness session keeps the stakeholders on their toes and help introspect.
- Strategic direction offered by CAADP and its 4 pillars
- The pricing system because that is where everything revolved. For agriculture to develop the pricing system should be competitive.
- Agro-industry presentations because they were well organized
- Session 2: set the scene on what should be done to revitalize the agricultural sector.
- All presentations were useful only if they are well persuaded. The information shared was useful but is it applicable? Hopefully people will take this interaction seriously.
Baseline survey gave me insight into the current status of the agricultural sector. The discussion around land tenure issues in relation with food security. This is because land security is a basic need for food security. State of preparedness by (a) service institutions, (b) agro-industry are areas we should focus on to increase agricultural production. We need to use this information in focusing funding resources.

Question 6: Which session was least useful? Why?
- Development partners because it promotes laziness and irresponsibility on ourselves
- Session 1 – NEPAD/CAADP – doesn't affect us directly. We are far from that, it’s a mirage!
- Most sessions rather too theoretical
- Presentation by Ministry departments. Nothing new was presented
- Farming Unions and Commodity Associations especially CFU and GAPWUZ. They still have a wrong perception of the land reform.
- State of preparedness by agro-industry – no figures
- Presentation by guests should be short and precise
- Baseline survey incomplete and had obvious information
- Farmers did not address key issues, lack of effective demand for farmer produce resulting in lack of effective demand for inputs. The truth is that farmers are not prepared but this did not come out clear in my view.
- We would have wanted more presentations related to list of needs to specific desired outcomes.
- State of preparedness by farmers because there was not a realistic voice of vulnerable poor/food insecure farmers. They said that farmers are not ready to sell but are buyers ready to buy. Such poor farmers must be invited to express opinions. Also senior government officials should try to attend at least during presentation of group work to hear stakeholder opinions.
- Discussion sessions were not answered as required. More time needed.
- Agro-industry felt more like history issues of input prices were not discussed and not repeating what was done before.
- Questions were not answered adequately.
- Banking sector not represented at appropriate level.
- Less people listened to group report back.
- Official opening because no question and answer. Would also have wanted the Minister to stay longer.
- Farmers Union session. There is need to focus on what the unions can deliver as service providers. Looks like they did not come prepared and do not have a road map on what they want to do.
- Group work seems to have been less focused and general to direct output.
- State of preparedness by development partners.
- Session too much focus on inputs and finance.
- We were expected to make presentations at conference but we only got to know about it on day of conference.
- Session 4 except for Dr Matibiri, the rest were off topic, said nothing on preparedness, no figures.
- Donor funding challenges – spent time on same trivial issues.
- Group breakaways and reports.
- The session that included CAADP and NEPAD wrongly placed.
Question 7: What topics would you like to see in future conferences or workshops?

- Livestock, livestock, livestock. Additional agro-industry to do with livestock products.
- NEPAD/CAADP progress; update on technical papers with more than desk review.
- All commodities and allied industries.
- Prioritization of strategies and donor commitment.
- Effect of politics on agriculture and how to manage it.
- Review of all topics covered.
- Agricultural financing for small and large scale commercial agriculture for production and marketing.
- We need to see the main principal actors in the GPA so that they can clarify to us what really is going to happen with security of tenure and property rights.
- Commodities – dairy, cotton, horticulture, ranching
- Strategic planning (national 5 year agricultural vision).
- Commodity based performance and development.
- Donor challenges must discuss service institutions.
- Farmers sharing personal experience both extremes.
- Food security and rural development.
- Farmer training.
- Output markets
- CAADP consultations
- Policy linkages
- Address on strategic issues not dwell on short term survival.
- Rationalisation of public institutions for agriculture.
- Concrete strategies to support increased farmer capacity.
- Completion of land reform agenda.
- Transforming agriculture.
- How to strengthen supporting institutions.
- Pricing policies
- Not so many topics but boldly address REAL, CRITICAL, PERTINENT issues. Can we not talk about awards won when 330,000 households need to be supported?
- Natural resources management for sustainability of future generations.
- Thought leadership in agriculture
- More on banking
- Issues of security of title.
- Farmer bargaining power
- The unions were not well represented, too little time, end of day was an oversight.
- Group sessions but with more time and focused guidelines.
- Input of various stakeholders state of preparedness.
- Case studies of success stories from within and without.
- Issues on HIV/AIDS and agriculture markets local and exports
- Development of farmers associations and support of agri-business.
- Role of international research institutes in African development and recovery.
- Set rules for conference.
- Stakeholder plans for recovery and growth.
- Food and nutrition, climate change adaptation, urban agriculture.
- Pricing system
- M & E of programs
• Viability and competitiveness of African commodity value chains.
• Biotechnology and its advances towards food security.
• Minister’s Agricultural policy statement should be debated.
• Cost implications of seed imports.
• Land security
• Video conferencing
• Youth in agriculture
• Audit methods
• Progress, achievements and challenges updates.
• Hear more from development partners.
• Gender mainstreaming linkages between HIV and food security.
• Linkages between donor support and yields produced as a result of the interventions.
• Donor management to be in line with national aspirations as well as developing strategies for transparency in resource allocation and access.
• Contribution of Ministry of Finance to agriculture.

**Question 10: Was enough time allocated to presentation of the topics**
- 5 minutes not enough time to scope of presentations. Maybe the conference should have been 3 days. Panelists needed at least 10 minutes each to get points across.
- Conference too packed, more time could have been allocated to make it more useful.
- There was a barrage of technical papers, better have an issues-based conference.
- People ended up cutting their presentations.
- 3-day work condensed to 2 days!
- Congested program
- Some presentations like GAPWUZ rushed
- Some presenters didn’t elaborate on issues
- Delay in starting on Day 1.
- Efforts made to stick to time.
- There are many sectors in agriculture that cater for various interest groups.
- Too many topics
- Limited time for questions.
- Livestock requires ½ day or full day.

**Question 11: Did you feel that you made an input as a stakeholder? If yes, in what way?**
- Contributed in group sessions
- More time and opportunities to contribute in smaller group was worthwhile.
- Seed multiplication
- Highlighting plight of labour
- Spelled out aspirations of farmer groups
- Questions answered adequately
- Brainstorming in groups
- Too many players
- Presenting on behalf of my industry
- Participated in debates
- But could have allowed more stakeholder input
- Already engaged and engaging
- Respecting others contributions
- At least stakeholders appreciate role of industry
Little participation, more time needed.
Participating in plenary
Prioritization and time constraining
Presented a paper
My views were considered and listened to

Question 12: In a follow-up of conference which topics should be given priority?
- The role of Ministry of Finance in supporting agriculture
- Financing
- How to increase capacity utilization in processing and manufacturing industry and on farms
- Drive to support productive farmers who are on the land
- Linkages between crop production and livestock
- Discussion on recovery and growth
- Security of tenure, there is no forward progress unless resolved
- Achieving food security and scaling up
- Climate change
- Agriculture Enterprise management
- Livestock grossly overlooked
- Irrigation
- Vulnerable groups – food security
- Update on state of preparedness
- Training in production
- Farming as a business
- Policy issues
- Review of previous season
- Importance of Labour
- Land
- Youth in Agriculture
- Current state of agriculture
- Availability of locally produced seed
- Strategies as opposed to history
- Agriculture and financing
- Follow up of this conference
- Farmer training
- Human capital development
- Inputs and markets
- Role of government and private sector
- Prioritization of strategic interventions
- Smallholder farmer focus
- Review conference’s targets and re-strategize
- Farmer/worker issues
- Government and stakeholders accountable for their promises, laws, policies
- CAADP progress
- Have a separate livestock session
- Development issues
- Status of productivity on farms
- Set targets
- Sectoral plans
• Prioritization
• Breakthrough progress, research outcomes
• Livestock
• Innovations and new technologies
• Food security
• Value addition of products and entering more lucrative markets
• New paradigm in agriculture
• People should concentrate on solutions or way forward rather than to only unfold problems and problems
• Progress on implementation of agreed targets
• Policy formulation process.

**Question 13: How could we further improve our workshops/conferences?**

- Venue was good and had the right ambient atmosphere. Need to use a similar venue in future too.
- Split issues to social, technical issues so as to deliberate on various platforms.
- Limit issues to enable sharper focus of brainstorming
- Information dissemination
- Allowing different organizations to attend
- Invite Ministry of Lands and Rural Resettlement to clarify issues of land use, distribution and resettlement and account for those idle farms not in use.
- Workshop should be held out of Harare as some people left in the afternoon.
- Conference ill-timed, it must be in April-May before season
- Hold outside Harare
- Venue crowded
- Have Ministry of Home Affairs, Justice, Labour, Local Government and Parliament as they are involved.
- Early conference in June/July
- Timing of conference late for meaningful implementation.
- Group discussions before lunch and groups must have most influential and most affected stakeholders participate in discussing
- Follow up in same way
- Give more time to prepare documents and must produce recommendations
- Preparatory stakeholder consultation
- Too large but as a first it was a good conference
- Consult more widely to set agenda across for all stakeholders outside government
- Set targets for next 5 years review at next conference
- Have stakeholders pre-workshops
- Consult stakeholders on issues to be discussed
- Allow more time for stakeholder interactions
- More time
- Focus on tangible deliverables
- Participants should attend full time
- Presenters must be told in advance
- Hold earlier in year
- Focus on future actions
- Focus on fewer issues and exhaust them
• Start with workshops covering various sectors – livestock, crops, processors, products then come together with agreed positions from the various sectors and then discuss global position on agriculture
• Bring resource persons from countries with successful agriculture systems.
• Provide allowances
• More time
• Since we are donor driven these days, give them 2 slots so that they share their success stories and best practice experience
• Firms tasks to achieve
• Straight and sharp presentations
• Have it in March each year
• Give information in advance to participants
• Allow more in-depth discussions on specific issues
• Increase amount of time on real issues.
• Include students in tertiary education

Topics to be included
• Financing
• Productivity
• Land Audit
• Livestock
• Land title
• Engaging private sector
• Gender issues in agriculture
• Avoid too many topics
• Fisheries (Aquaculture in Zimbabwe)
• Apiculture specialization
• Land issue critical
• Avoid irrelevant topics.

Question 14: Any Other comments/suggestions

Organization
• Good but time too late into season
• Invite National Employment council of the Agricultural Industry, they are an important stakeholder
• Out of Harare better
• Management of groups weak, could be improved.
• University – Africa, UZ, Lupane, MSU must be invited to discuss findings on agriculture as there is lots of evidence based research finding in key agricultural issues.
• Responsible ministries should also be available
• More private sector participation
• Bring processors such as DZL, Colcom, CSC, Pigs, Poultry
• Facilitators were excellent
• Great organization, keep it up
• Transition to sessions must be swift

Speakers
• Good selection with experience in Africa
• Need to be creative/innovative
Well prepared
Some people came to discourage others, not good at all.
From NRZ, ZESA, ZINWA – their preparedness
Some needed more preparation
The first 4 presentations should have been given more time and discussion.
Too little time
Need a mixture of experts/politicians/thinkers.