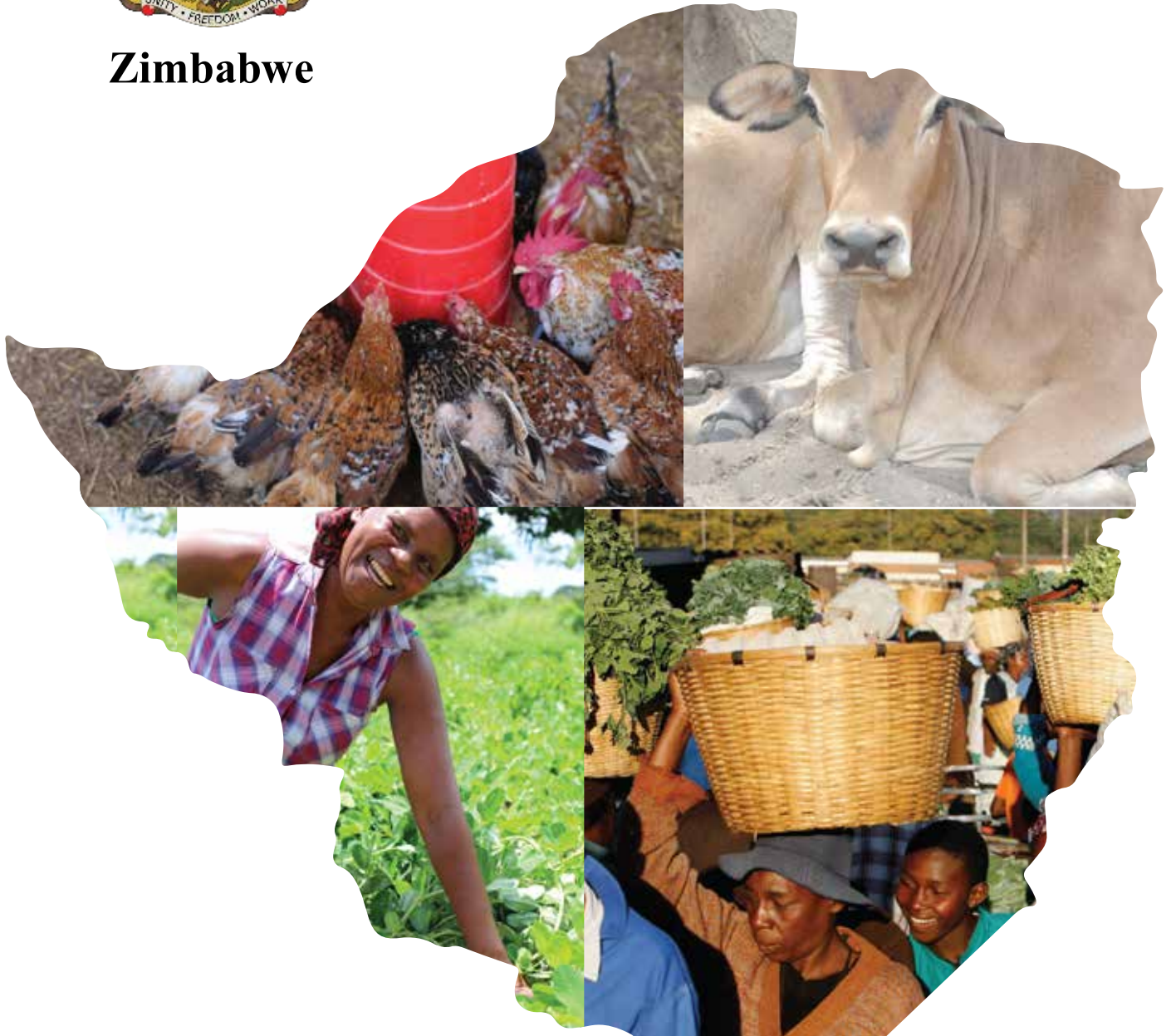




Zimbabwe



Reimagining Zimbabwe's Agricultural Sector

**NATIONAL AGRICULTURE POLICY FRAMEWORK
2019 - 2030**



Ministry of Lands, Agriculture, Water, Climate and Rural Resettlement



NATIONAL AGRICULTURE POLICY FRAMEWORK (2019-2030)

Ministry of Lands, Agriculture, Water, Climate and Rural Resettlement
Ngungunyana Building,
Borrowdale Rd, Harare, Zimbabwe.
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FOREWORD

The National Agricultural Policy Framework (NAPF) comes at an opportune time in the history of Zimbabwe, especially as the Government re-engages the international community and seeks to stimulate economic growth given its catalytic role in stimulating growth in other sectors of the economy. The NAPF provides policy guidelines to promote investment in agriculture as domestic, regional and international investors heed His Excellency, President of the Republic of Zimbabwe, Cde. E. D. Mnangagwa's call. In the past, the agricultural sector has operated on multiple policy interventions that have been unable to provide a holistic and time-responsive framework for agricultural development. The last agricultural policy framework was developed in 1994 to cover the period 1995-2020. However, the framework was overtaken by events including the following:

1. Zimbabwe became a member of the World Trade Organization (WTO) in 1995 and to-date, a number of agreements have been reached. These include the Agreement on Agriculture, Agreement on Application of Sanitary and Phytosanitary Measures and Agreement on Trade Facilitation. In line with these agreements a new policy is required to guide implementation of subsidy programmes, public stockholding of grain reserves, and protection of local producers using tariffs, quotas and licenses;
2. The Land Redistribution Programme embarked upon in 2000, which has significantly altered the agrarian structure calls for a policy that supports land capacity utilization, production and productivity;
3. The Sustainable Development Goals (SDGs) adopted in 2015 call for agricultural policies to contribute to achieving goals addressing climate change, responsible production and consumption, agro-industry, innovation, agriculture related infrastructure development, and public- private partnerships in achieving these goals;
4. Zimbabwe became party to the Maputo Declaration (2003) and Malabo Declaration (2014) which commit all African Countries to the implementation of the Comprehensive African Agriculture Development Programme (CAADP) as an instrument for driving agricultural led economic recovery. The sector therefore needs an aligned policy framework;
5. There have been new developments with respect to SADC Free Trade Area, COMESA Free Trade Area and Continental Free Trade Area, which Zimbabwe signed recently and SADC-EAC-COMESA Tripartite Free Trade Area. Implementation of these agreements mean increased competition on the domestic and regional and continental markets. A new policy is key to develop our competitiveness and protect local producers, industry and consumers within the confines of international regulations.

In his inauguration speech, His Excellency, President of the Republic of Zimbabwe, Cde. E. D. Mnangagwa pronounced his desire for a more market-based economy well integrated into the global economy. The President followed it up with the signing of the Continental Free Trade Area (CFTA) Agreement. In keeping with Zimbabwe's policy on re-engagement, international, continental, regional and national policy frameworks informed the policy

development process. The NAPF has been formulated taking into account the current trends and issues; in particular how to sustainably solve the challenges facing the sector post the fast-track land reform programme.

Furthermore, the NAPF is in line with the new political and economic environment in the country, recognizing priorities under the National Food and Nutrition Security Policy; Industrial Development Policy; National Trade Policy; National Gender Policy; National Youth Policy; and National Environment Policy. In addition to these are new policy issues relating to land, special economic zones, public private partnerships and joint ventures. It encompasses key facets of the agriculture sector starting with: Agricultural Production and Productivity to ensure food and nutrition security and resilience; Agriculture, Knowledge, Technology and Innovation Systems (AKTIS); Agricultural Infrastructure; Agro-processing and Value addition; Agricultural Marketing and Trade; Agricultural Finance and Credit; and Land Administration and Secure Land Rights. The NAPF is grounded in a number of principles as follows: a) productivity and growth oriented; b) nutrition sensitive c) private sector led and public sector facilitated; d) market-based interventions; e) collaborative and multi-sectoral; f) participatory and responsive to agro-ecological potential in line with the devolution agenda; g) climate smart and sustainable; and h) gender, youths, and other vulnerable groups mainstreaming.

Agriculture is multi-sectoral and multi-disciplinary; apart from my Ministry, there are various other Ministries, along with their departments and parastatals that are important to the prosperity of the agriculture sector. In addition to these public sector players, there are other key stakeholders such as local communities, the private sector, development partners and civil society. This reality dictates that policy processes, such as implementation, monitoring and evaluation, should be well coordinated to leverage on complementarities and avoid discord. The starting point for this is the institutionalisation of the agriculture sector coordination function. I am very confident that this policy framework will adequately guide the operationalisation and implementation of various subsector strategies and development plans for increased contribution of the agriculture sector to Gross Domestic Product (GDP).

Honourable Air Chief Marshal Perrance Shiri (rtd)

Minister of Lands, Agriculture, Water, Climate and Rural Resettlement

ACKNOWLEDGEMENT

In the crafting of this Policy appreciation is extended to His Excellency, the President of the Republic of Zimbabwe, Comrade E.D Mnangagwa, for spearheading the vision of a revived agriculture sector in Zimbabwe. Appreciation is also given to the Ministry of Lands, Agriculture, Water, Climate and Rural Resettlements (MLAWCRR), specifically, the Minister, Honourable Air Chief Marshal Perrance Shiri (rtd), and Deputy Ministers, Honourable Vangelis Haritatos and Honourable Douglas Karoro, for their leadership role in the formulation of the Policy.

The Ministry would like to thank all stakeholders for their contributions, candid responses, and patience in the national, provincial and district stakeholder consultations, policy review meetings, and the validation workshops. This work was enabled through the collaborative work by the Ministry and the Food and Agriculture Organization of the United Nations (FAO) and the regional technical partner Indaba Agricultural Policy Research Institute (IAPRI), under the Department for International Development (DFID) funded Livelihoods and Food Security Programme (LFSP).

Eng. R. J. Chitsiko

Secretary for Ministry of Lands, Agriculture, Water, Climate and Rural Resettlement

EXECUTIVE SUMMARY

Background

The Ministry embarked on an inclusive policy development process to harmonise sector and sub-sector policies resulting in the Zimbabwe National Agriculture Policy Framework (NAPF-2019-2030). The new policy is in line with the Zimbabwe Vision 2030 Agenda, of attaining 'Upper Middle Income Status' by 2030.

The overall objective of the NAPF is to provide policy guidance and direction on how to promote and support the sustainable flow of local and external investment and resources necessary to transform the agricultural sector through increased and sustained agricultural production, productivity and competitiveness.

The NAPF provides a relevant and evidence-based framework to guide and coordinate the development of sector-specific strategies that will provide more details, priorities, implementing means and enforcement mechanisms. In particular, the framework identifies key challenges constraining agricultural performance, defines objectives, strategic initiatives, and development results/outcomes for the agricultural sector as well as articulates a roadmap to strengthen the agricultural sector.

Emerging Challenges of the Agricultural Sector

The restructured agricultural sector in Zimbabwe has created new opportunities and challenges. However, the sector faces a myriad of challenges relating to low production and productivity, limited number of markets, limited access to existing markets and finance among others. As a result, agricultural investment has sharply declined, negatively affecting agricultural productivity and overall production.

The Government of Zimbabwe (GoZ) recognizes that agriculture is one of the key priority sectors in achieving sustainable economic growth and poverty reduction. However, frequent droughts plus limited resilience, inadequate resource allocation to key drivers of agriculture growth and sometimes inconsistent and ad hoc policy actions associated with the agricultural sector have made it impossible to achieve the stated goals.

Challenges facing the Zimbabwe's agricultural sector require a policy framework that is not 'business as usual', but one that holistically addresses key facets of the agriculture sector starting with agricultural production and productivity to ensure food and nutrition security and resilience. In addition, agriculture knowledge, technology and innovation systems; agricultural infrastructure; agro-processing and value addition; agricultural marketing and trade; agricultural finance and credit; land administration; and secure land rights form the key pillars of the NAPF.

Pillars of the NAPF

In Zimbabwe, the major problems to be addressed relate to low institutional and human capacity and the lack of a stable and enabling legal, policy and institutional framework, leading to diminished investor confidence and consequently, poor agricultural production and productivity. This, therefore, calls for the formulation of interventions that enhance both institutional and human capacity and the strengthening of the legal, policy and institutional framework within the agriculture sector. To do this, the NAPF groups the emerging challenges facing the agricultural sector into nine pillars as follows:

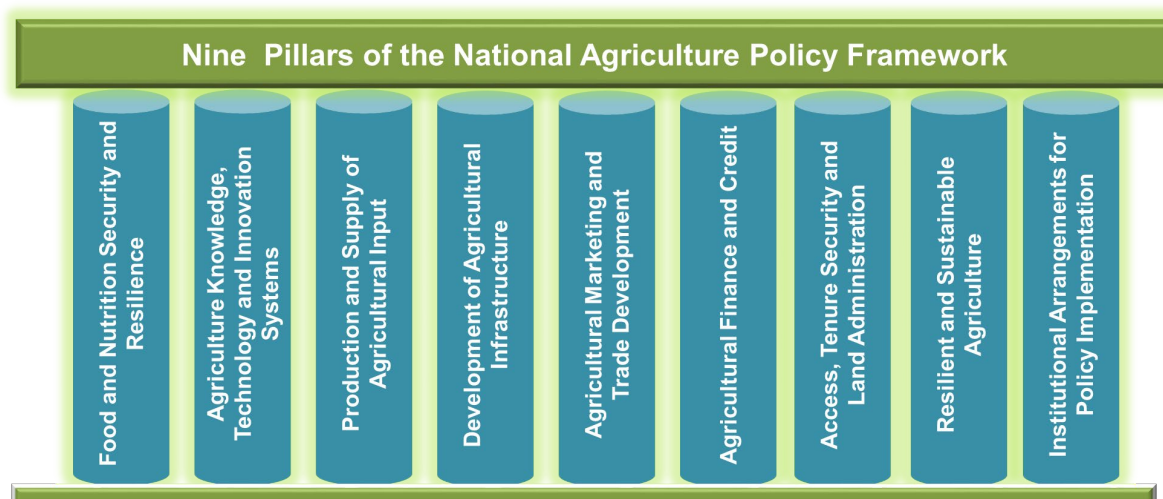


Figure 1: NAPF Pillars

Goal of the NAPF

The overall goal of the NAPF is to create a stable enabling environment and flow of investment that sustainably enhances the capacity of the agricultural sector to anchor national economic growth to upper middle income status by 2030.

Vision

A prosperous, sustainable, resilient, diverse and competitive agriculture sector, ensuring food and nutrition security and significantly contributing to national development in the context of sustainable structural transformation.

Policy Objectives

1. Assure national and household food and nutrition security in a sustainable and resilient manner;
2. Ensure that the existing agricultural resource base is restored, maintained and improved to achieve sustainable agricultural intensification;
3. Generate income and decent employment to feasible optimum levels, with a special focus on women and youth;
4. Increase agriculture's contribution to the nation's Gross Domestic Product (GDP) through productivity improvements in crop, livestock, forests and fisheries sectors;

5. Contribute to sustainable industrial development through the provision of competitively home-grown agricultural raw materials;
6. Improve agricultural market access, exports, value addition and competitiveness and sustainable funding mechanisms;
7. Promote conservation and sustainable use of genetic resources important for food and agriculture ; and
8. Improve multi-stakeholder cooperation and exchange among government arms, private sector, farmer-owned institutions, civil society organisations and development partners.

Guiding Principles

The NAPF is built on nine key principles that cut across all its pillars (Figure 2). These are mainstreamed across all strategic objectives. This entails embracing the use of evidence to guide decision-making, mainstream sustainability into the process of agricultural intensification for both crop and livestock sectors and is in line with the aspirations of SDG 2¹. NAPF seeks to ensure that investments and interventions in the sector are private sector-led and that they contribute to food and nutrition security, mainstream gender, youth and other vulnerable groups (i.e. people with disabilities, and the chronically ill).

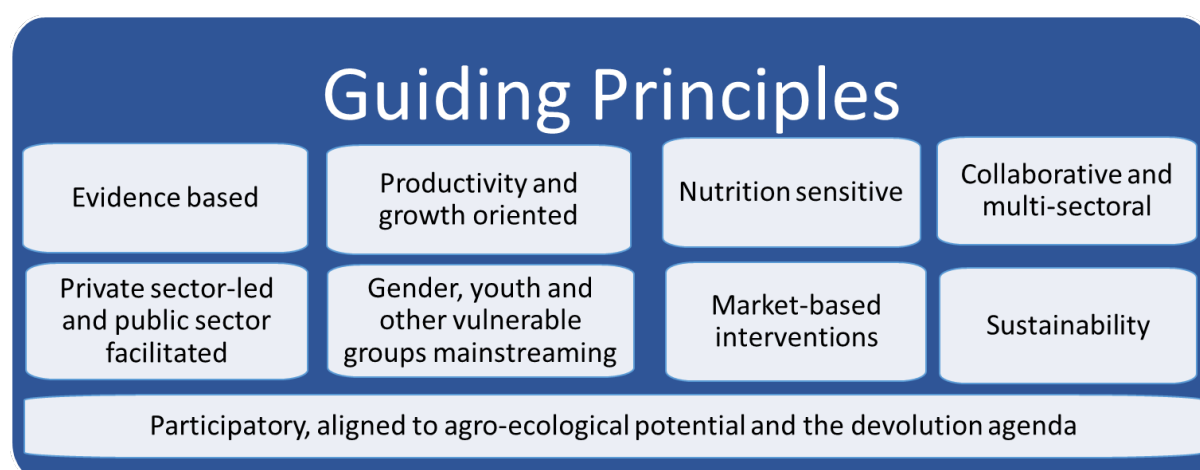


Figure 2: Guiding Principles

¹ Sustainable Development Goal number 2 - End hunger, achieve food security and improved nutrition and promote sustainable agriculture

Pillar Policy Statements and Strategic Objectives

Pillar I: Food and Nutrition Security and Resilience

Policy statement

Ensure food and nutrition security for all through sustainable agricultural intensification, dietary diversification, improved access to land, finance and markets and other resilience building measures.

Strategic Objectives

- i. Facilitate the implementation of policies that recognise and promote alternative agriculture practices enhancing crop diversity and availability of nutritious food moving away from maize centric interventions and maximise on low entry barriers for resource-poor farmers.
- ii. Support the development and enforcement of micronutrient intervention related policies.
- iii. Support food safety through adequately enforced regulation of food production, processing, storage and distribution.
- iv. Raise productivity to optimal levels through climate-resilient sustainable intensification, based on restoring soil health and making optimum use of water and other natural resources that improve local genetic resources (such as small grains, pulses and legumes).

Pillar II: Agricultural Knowledge, Technology and Innovation Systems

Policy statement

Increase investment in agricultural research and development, technology and extension systems and adoption of climate- and business-smart technology and innovation.

Strategic Objectives

- i. To develop and promote an efficient and inclusive agricultural knowledge, technology, innovation and communication (exchange and dissemination) system.
- ii. To increase public and private investment in agricultural research and development, technology and extension.
- iii. To improve delivery and coordination of public and private extension services adapted to farmers' current needs.
- iv. To improve agricultural colleges/universities and curricula adapted to needs (e.g. climate-resilient sustainable intensification, early warning systems, managing pests and diseases, nutrition) as well as practical training for extension staff on farms.
- v. To continue development and deployment of information systems and mobile phone platforms for improved research and extension.
- vi. To set research priorities in consultation with farmers and unions, MLAWCRR and private sector service providers and value chain actors.

Pillar III: Production and Supply of Agricultural Inputs

Policy statement

Increase the safe, sustainable and precise utilisation of productivity-enhancing agricultural inputs.

Strategic Objectives

- i. To promote policy actions that lower the costs of appropriate, safe agricultural inputs which crowd in private sector.
- ii. To improve access to finance for farmers to enhance their capacity to access adequate inputs on time, and customising financing models to the specific needs of smallholder and commercial farmers.
- iii. To increase timely supply of adequate and diverse inputs through the development of an efficient, diverse, competitive, private-sector-led production, distribution, and marketing system.
- iv. Support the exploitation of natural resources for use as agriculture inputs in organic agriculture.
- v. To support the development of local indigenous farmer seed systems.
- vi. Reduce dependence on agro-chemicals while sustainably enhancing overall productivity and nutritional value of food through promotion of agro-ecological practices.

Pillar IV: Development of Agricultural Infrastructure

Policy statement

Invest more resources in the development of infrastructure to support agricultural production, value addition, marketing and trade.

Strategic Objectives

- i. To develop, rehabilitate and modernize agricultural infrastructure.
- ii. To increase access to appropriate low-cost agricultural technologies.
- iii. Reduce energy costs and increase production and use of renewable energy across the agricultural value chain.
- iv. To promote climate-smart agricultural infrastructure development.

Pillar V: Agricultural Marketing and Trade Development

Policy statement

Develop effective and efficient domestic, regional and international agricultural markets.

Strategic Objectives

- i. To enhance organisation of agricultural producers through producer associations, innovative, inclusive and equitable productive alliances, and to support small producer associations to grow, federate and/or evolve into SMEs.
- ii. Improve access to lucrative market segments in agricultural value chains by smallholder farmers, including through application of ICT.
- iii. To support development and revitalisation of infrastructure including agro-processing and marketing hubs in suitable small and emerging urban centres.
- iv. Facilitate reduction in the cost of doing business.
- v. Increase agricultural exports.
- vi. To position the country to access the growing organic niche' market.
- vii. Facilitate contract farming for farmers with sufficient capacity and for value chains and farming practices suited to agro-ecological zones.
- viii. Capacity development of smallholder farmers in marketing and business skills.

Pillar VI: Agricultural Finance and Credit

Policy Statement

To improve access, availability and appropriateness of agricultural financing.

Strategic Objectives

- i. To facilitate the mobilisation of affordable and long term lines of credit.
- ii. To facilitate access to affordable credit and funding for the sector in line with sustainable agricultural intensification appropriate to agro-ecological zones.
- iii. To avail farmers of incentives for sustainable agriculture and natural resource management, making use of payments for ecosystem services and climate finance.
- iv. To facilitate creation of a guarantee fund.

Pillar VII: Access, Tenure Security and Land Administration

Policy statement:

Promote equitable and secure land tenure and rights.

Strategic Objectives

- i. To strengthen the land tenure system to confer security of all land rights.
- ii. To develop an effective, equitable and efficient land administration system.
- iii. To develop a new land policy to achieve the above objectives.

Pillar VIII: Resilient and Sustainable Agriculture

Policy statement

Improve farmer resilience, increase productivity through mitigation and adaptation to climate shocks, and sustainability of agriculture and food systems.

Strategic Objectives

- i. To enhance the resilience of agriculture production systems to climate change, pest and diseases attacks.
- ii. To mainstream climate change impacts in all programmes and subsectors and mobilise funds for climate change adaptation and mitigation programmes.
- iii. To enhance local capacity to generate, disseminate and understand climate information and best practices.
- iv. To mainstream resource use efficiency and sustainable natural resource management in agricultural production systems through capacity building of extension services and farmers and payment for ecosystem services.
- v. To promote widespread uptake of sustainable agricultural intensification approaches and technologies, and practices such as agro ecology.

Pillar IX: Institutional Arrangements for Policy Implementation

Policy statement

To facilitate a participatory and inclusive policy implementation engagement of all the relevant actors in the agricultural sector, hence ensuring a shared ownership of the process and outcomes.

Strategic Objectives

- i. To have an effective and robust coordination mechanism to ensure enhanced synergies across other sectors.
- ii. To facilitate the active participation of political leadership, government officers, the private sector, development partners, the civil society and local communities with regular feedback between implementing agencies as a way of promoting learning and knowledge sharing.
- iii. To enable the translation of the NAPF into a result oriented implementation plan.

NAPF linkages to other Sector Policies

The NAPF is guided and aligned to *the collective determination and aspiration of the People of Zimbabwe for a Prosperous and Empowered Upper Middle Income Society by 2030* as expressed in the Transitional Stabilisation Programme (TSP) 2018-2020, which prioritises fiscal consolidation, economic stabilisation and stimulation of growth and creation of employment. The NAPF will feed into the subsequent Five-year Development Strategies from 2021 to 2030.

Agriculture interfaces with several other sectors, thus, cross-sectoral policy coherence is critical for development purposes. Therefore, the NAPF will be linked to other policies especially those focusing on infrastructural development, particularly in the Energy, Water, Transport and Information Communication Technology (ICT) sectors. Moreover, because of the linkages between agriculture and the environment, any strategies for sustainable development must be aligned to the NAPF.

National, Regional and International Context

Zimbabwe is a signatory to various national, regional and international agreements and frameworks focusing on the agriculture sector. The NAPF incorporates a set of development intentions, targets, principles and values of key global, regional, and national initiatives including; United Nations (UN) Conventions (Agenda 2030 for Sustainable Development Goals, Feed Africa Programme, and Paris Declaration), the New Partnership for Africa Development (NEPAD), Comprehensive Africa Agriculture Development Programme (CAADP), United Nations Framework Convention on Climate Change (UNFCCC), the Malabo Declaration of 2014, the Common Market for Eastern and Southern Africa (COMESA) and the Southern African Development Community (SADC). The global compacts on financing mechanisms for the SDGs and the Paris Declaration on Climate Change call on member States to explore additional mechanisms to enhance the flow of investments, including climate funds, to support inclusive, sustainable and green growth and development. This includes the mobilisation of climate compliant funds to support climate-smart agriculture.

Operationalising the policy framework

The policy framework will be operationalised by ensuring adequate technical capacity and clear roles for the public service officers responsible for implementation and roll out of subsector specific actions aligned to this framework; monitoring and evaluation of the expected outcomes; and the facilitation of effective partnerships with other line ministries and departments, parastatals, private sector, civil society, farmers, academia and development partners. Secondly, the framework will be translated into a result oriented implementation plan in the form of a revised ZAIP. In addition, the operationalisation of the framework will be driven through a robust coordination mechanism guided by the national structures and pillars for implementation of the Vision 2030, integration with the National and subnational Food Security structures and strengthening of the ZAIP coordination framework.

Given that the agricultural sector has responsibilities spread across various ministries, there is need for the formation of an Agriculture Sector Inter-Ministerial Committee (ASIMC) chaired by the MLAWCRR and with the participation of the Ministry of Public Service Labour and Social Welfare (MPSLSW), Ministry of Finance and Economic Development (MFED), Ministry of Small and Medium Enterprise (MSME), and Ministry of Industry and Commerce (MIC). Representatives from development partners, Non-Governmental Organisations (NGOs), private sector, and farmer unions can also be invited to take part. At technical level, the Agricultural Sector Steering Committee (ASSC) comprising Permanent Secretaries from

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these ministries can be set up with the participation of Chairpersons of all pillar/Thematic Working groups (TWGs), Confederation of Zimbabwean Industries (CZI), farmer organisations, Non-Governmental Organisations (NGOs), development partners, Bankers Association of Zimbabwe (BAZ), Zimbabwe Council for Higher Education (ZIMCHE) and the Zimbabwe National Chamber of Commerce (ZNCC).

Lastly, to turnaround Zimbabwe's agricultural sector, there is need to attract diverse resources to finance the development of the sector. The Government shall need to mobilise resources from both public and private sources. There is need to reinvigorate the ZAIP to align with the African Union (AU) processes for country support which are funded through CAADP business meetings. The Government will allocate a significant proportion of its budget for agriculture sector development in line with the AU Maputo Declaration of 2014 and CAADP in 2003.

Given the impact of agriculture on other sectors and vice-versa, agricultural policy implementation, monitoring, and evaluation will be multi-sectoral and collaborative. The NAPF will be reviewed annually starting in 2019, with a comprehensive review being done every four years of implementation, in 2022, 2026 and 2030.



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ABBREVIATIONS AND ACRONYMS

AGRITEX	Agricultural Technical and Extension Services
AKTIS	Agricultural Knowledge, Technology and Information Systems
AKTIPS	Agricultural Knowledge, Technology and Information Platform Systems
ASIMC	Agriculture Sector Inter-Ministerial Committee
ASPEF	Agriculture Sector Productivity Enhancement Facility
CA	Conservation Agriculture
CAADP	Comprehensive Africa Agriculture Development Programme
DFID	Department for International Development
DR&SS	Department of Research and Specialist Services
FAO	Food and Agriculture Organisation of the United Nations
FDGs	Focus Group Discussions
FTLR	Fast Track Land Reform
GDP	Gross Domestic Product
HCCs	Hubs/Clusters/Corridors
IAPRI	Indaba Agricultural Policy Research Institute
ICT	Information Communication Technology
LFSP	Zimbabwe Livelihoods and Food Security Programme
LFSP-APN	Zimbabwe Livelihoods and Food Security Programme – Agriculture Productivity and Nutrition
MAMID	Ministry of Agriculture, Mechanization and Irrigation Development
MDGs	Millennium Development Goals
MFI	Microfinance Institution
MFED	Ministry of Finance and Economic Development
MLAWCRR	Ministry of Lands, Agriculture, Water, Climate and Rural Resettlement
MSU-FSG	Michigan State University - Food Security Group
NAPF	National Agriculture Policy Framework
NEPAD	New Partnership for Africa's Development
PSF	Productive Sector Fund
RESAKSS	Regional Strategic Analysis and Knowledge Support System
SADC	Southern African Development Community
SDGs	Sustainable Development Goals
SGR	Strategic Grain Reserve
SSA	Sub-Saharan Africa
UN	United Nations
UNDAF	The United Nations Development Assistance Framework
UZ-AEE	University of Zimbabwe, Department of Agricultural Economics and Extension
ZAIP	Zimbabwe Agricultural Investment Programme
ZEPARU	Zimbabwe Economic Policy Analysis and Research Unit (ZEPARU)
ZimAsset	Zimbabwe Agenda for Sustainable Socio-Economic Transformation
ZIMSTAT	Zimbabwe Statistics Agency
ZimVAC	Zimbabwe Vulnerability Assessment Committee



1. BACKGROUND

The restructuring of the agricultural sector in Zimbabwe has created new opportunities. However, the sector has faced a myriad of challenges including high input costs, limited number of, and poor access to, markets, and limited access to finance among others. As a result, agricultural investment has sharply declined, negatively affecting productivity and overall production.

Currently, Zimbabwe has some of the highest levels of food insecurity and poverty in Sub Saharan Africa. Approximately 70 percent of the population relies on subsistence and rain-fed agriculture for their livelihood, food and nutrition security. The high reliance on subsistence rain-fed agriculture renders a large majority of the rural population vulnerable to climate-related shocks and seasonal stressors. The unstable macroeconomic and policy environment has had ripple effects across different nodes of the agricultural value chain.

The challenges facing the Zimbabwe's agricultural sector require a policy framework that is not 'business as usual' but one that encompasses key facets of the agriculture sector starting with agricultural production and productivity to ensure food and nutrition security and resilience, agriculture, knowledge, technology and innovation systems; agricultural infrastructure; agro-processing and value addition; agricultural marketing and trade; agricultural finance and credit; and land administration and secure land rights.

1.1 Sectoral Characteristics

The potential for agricultural growth in Zimbabwe is staggering. The country is uniquely endowed with rich resources for agricultural development, which if harnessed fully, would enable the country to become the breadbasket of the Southern African region again. Zimbabwe has abundant land, a large amount of underground and surface water resources (with more than 8,000 dams), and rich flora and fauna. Diverse agro-climatic conditions have enabled the country to grow a large variety of crops, with over 23 types of food and cash crops and a variety of livestock species.

One of the key features of the agricultural sector in the last 15 years has been the fundamental transformation in the structure of land ownership, access to and use of rural agricultural land as a result of the fast-track national land reform and resettlement programme. The dualistic nature of large-scale commercial white farmers (approximately 6,000 prior to 2000) occupying disproportionately large and high-potential agricultural land has been replaced by a structure comprising smallholder farmers that occupy close to 70 percent of the total agricultural land. There are large numbers of medium to large-scale commercial farmers operating on smaller landholdings as shown in Figure 3.

The size of large-scale commercial farms were reduced resulting in 145,000 new A1 and 18,000 new A2 farmers, added to the existing communal and old resettled farmers, to bring the total number of smallholders to about 1.3 million. The number of large-scale farmers was reduced from 6,000 to 4,500.

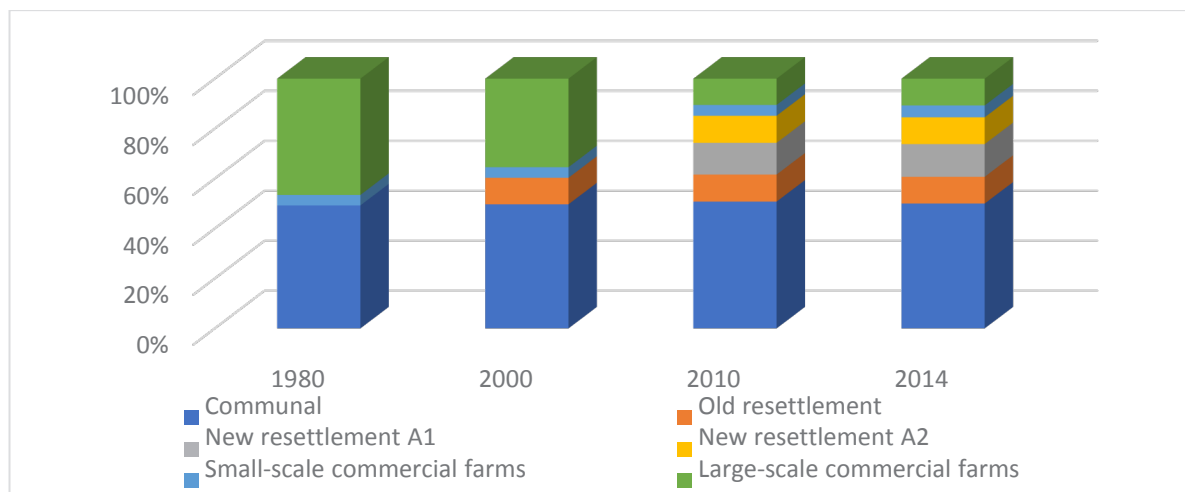


Figure 3: Zimbabwe farm type distribution by year

Source: MLAWCRR, 2015

Zimbabwe’s agricultural sector still remains predominantly smallholder-dominated with over a million communal farmers relying predominantly on rain-fed agriculture, and close to 70 percent of them making a livelihood on less than two hectares (Ha). The debate, however, should not be on whether to promote smallholder farmers or turn the focus on to the new medium/large-scale, but to find policy options that are suited to different farm categories including the large-scale commercial farmers. A ‘one size fits all’ strategy will likely leave many trapped in poverty due to productivity and resource constraints facing the different farmers. Also, such a strategy may fail to harness the symbiotic relationship and synergies that exist between farmer categories.

1.2 Significance of Agriculture in Zimbabwe

Agriculture occupies a central place in the Zimbabwean economy for employment, incomes and poverty reduction. It contributes 15-18 percent of Gross Domestic Product (GDP), 23 percent to the total formal employment, and provides livelihoods to approximately 70 percent of the rural population (54 percent of which are women). It also supplies about 63 percent of industrial raw materials with the share of agriculture in manufacturing value added at 60 percent, and the share in export earnings at 30 percent. Agriculture-related employment supports a third of the formal labour force.

Figure 4 shows the contribution of various commodities to agricultural GDP. Maize, tobacco and cotton account for more than 50 percent of the agricultural GDP, with tobacco leading the pack with 25 percent, followed by maize at 14 percent, and cotton at 12 percent. Ten percent is accounted for by the beef and fisheries sectors, whilst about 24 percent is devoted to the rest of the livestock like sheep, goats, pigs, poultry and ostrich. Within the milieu of commodities; tobacco, cotton, sugar, horticulture, tea, and bananas collectively account for about 40 percent by value of national exports. The performance of the agricultural sector therefore has a direct bearing on overall national economic performance, and on human development especially with regard to national and household food and nutrition security.

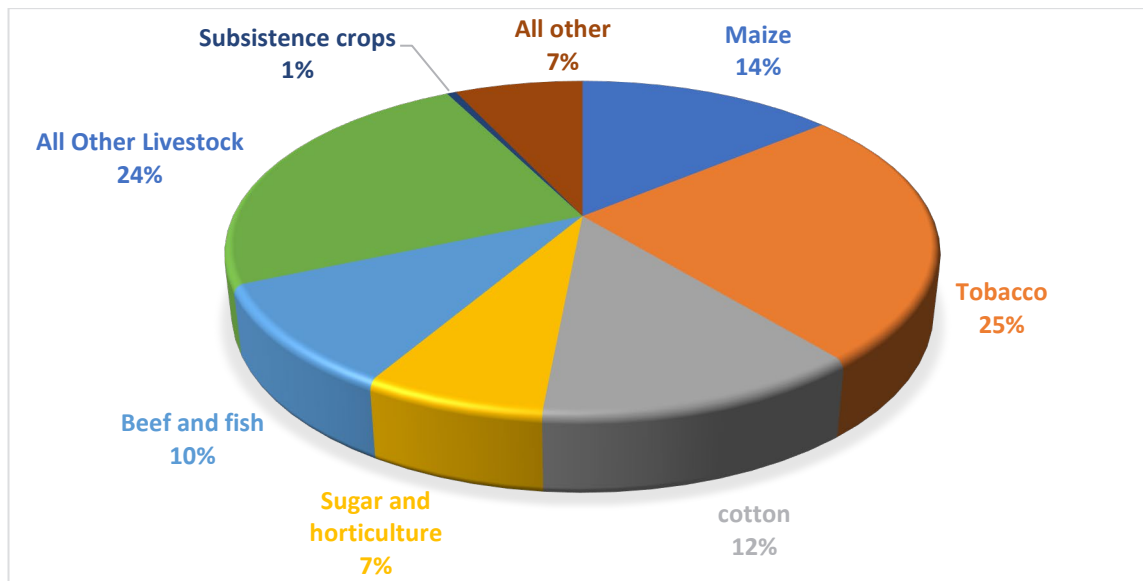


Figure 4: Contribution of various agro sub-sectors to Agriculture GDP

Source: ZIMSTAT, 2017

1.3 Rationale of NAPF

The restructured agricultural sector in Zimbabwe has created new opportunities and challenges. The sector has been facing a myriad of challenges relating to low production and productivity, lack of markets, poor access to existing markets, and access to finance among others. As a result, agricultural investment has sharply declined, negatively affecting agricultural productivity and overall production. The NAPF will guide the development of a new and relevant policy and regulatory framework that responds to the needs of the restructured and evolving agricultural sector.

The overall objective of the NAPF is to provide policy guidance and direction on how to promote and support the sustainable flow of local and external investment and resources necessary to transform the agricultural sector through increased and sustained agricultural production, productivity and competitiveness. The NAPF provides a relevant and evidence-based framework to guide and coordinate the development of sector-specific policies that will provide more details, priorities, implementing means, and enforcement mechanisms.

Specific objectives of the NAPF are to:

1. Identify key challenges constraining agricultural performance
2. Define objectives, strategic initiatives and development results/outcomes for the agricultural sector
3. Articulate a roadmap to strengthen agricultural performance and achieve the following:
 - a. National and household food and nutrition security;
 - b. Promote conservation and sustainable use of genetic resources important for food and agriculture;
 - c. Generate foreign currency, income and employment;
 - d. Increase agriculture's contribution to the GDP;
 - e. Sustainable industrial development through the provision of adequate agricultural raw materials;
 - f. Enhanced resilience to climatic and other shocks;

- g. Improve agricultural market access, exports, value addition and competitiveness; and
- h. Provide a conducive policy and regulatory environment for agricultural development.

1.4 NAPF linkages to other Sector Policies

The provision of many infrastructural services like water, power, transport, information communication technologies, market intelligence, and marketing facilities fall within the mandate of public and semi-public institutions that are outside the control of agriculture; yet they are critical to sustaining the integrity and efficacy of all agricultural value chains. However, the investment plans and actions of these ancillary sectors must, therefore, cohere to facilitate optimum delivery of the agricultural sector under the support of appropriate institutional structures and systems.

Therefore, the NAPF is linked to other policies especially those focusing on infrastructural development, particularly in the Energy, Water, Transport and ICT sectors. Further, because of the linkages between agriculture and the environment, strategies for sustainable development must be aligned to the NAPF.

1.5 National, Regional and International Context

The NAPF was conceived in the context of a different set of both domestic and global development circumstances. Zimbabwe is signatory to various national, regional and international agreements and frameworks which focus on the agriculture sector. Therefore, the NAPF incorporates a set of development intentions, targets, principles and values of key global regional and national initiatives including United Nations Conventions (Agenda 2030 for Sustainable Development Goals, Paris Declaration and the International Treaty on Plant Genetic Resources for Food and Agriculture and United Nations Framework Convention on Climate Change), Feed Africa Programme, NEPAD, CAADP, the Malabo Declaration of 2014, COMESA and SADC.

At the continental level, Vision 2063 for Africa, which invariably finds practical expression through continental initiatives like Feed Africa that are funded through the African Development Bank, the European Union, the World Bank, and Foundations; represent veritable sources of investments to make the achievement of Zimbabwe's NAPF objectives a reality. Whilst CAADP together with the Malabo commitments still remains a reference point, the MDGs have since been replaced by a more ambitious set of global development intentions and targets under the rubric of Agenda 2030 for Sustainable Development; whose achievements in the agricultural sector is expected to contribute to sustainable development. It is particularly noteworthy that, beyond the 17 SDGs, the global compacts on financing mechanisms for the SDGs and the Paris Declaration on Climate Change call on member states to explore additional mechanisms to enhance the flow of investments, including climate funds, to support inclusive, sustainable and green growth and development. This includes the mobilisation of climate compliant funds to support climate-smart agriculture.

At national level, the framework was married to national development results and outcomes articulated in the National Development Plan 2030, ZAIP 2017-2021, National Climate Policy and Gender Policy among others.

2. SITUATION ANALYSIS

2.1 Overview

The agricultural sector remains the main viable vehicle through which development and poverty reduction can occur in the country. Evidence shows that agricultural growth reduces poverty by twice the rate of growth in non-agricultural sectors². However, in Zimbabwe this growth has been curtailed by the slow rate of the country's economic recovery since 2000 when the Government implemented the Fast Track Land Reform Programme (FTLR). Since then, there has been fluctuations in socioeconomic dynamics and shifting bilateral relations with cooperating partners and donor countries. Poverty rates have remained stubbornly high. Nearly 84.3 percent of the rural population live below the poverty line with the national poverty rate standing at approximately 63.9 percent, whilst the proportion of food insecure people has ranged between a low of 6 percent in 2014 and a high of 42 percent in 2016³.

Agriculture occupies a central place in the Zimbabwean economy for employment, incomes and poverty reduction. It contributes 15-18 percent of GDP, 23 percent to the total formal employment, and provides livelihoods to approximately 70 percent of the rural population (54 percent of which are women). It also supplies about 63 percent of industrial raw materials with the share of agriculture in manufacturing value added at 60 percent, and the share in export earnings at 30 percent. Agriculture-related employment supports a third of the formal labour force. As such, a vibrant agricultural sector is key to driving pro-poor economic growth and sustainable development, poverty reduction, employment creation and food and nutrition security.

The country is divided into five agro-ecological regions based on a combination of factors including rainfall regime; temperature; the quantity and variability of average rainfall; as well as soil quality and vegetation (Figure 5). The suitability of cropping declines from Region I through to Region V. Rainfall ranges from above 1,050 mm to as low as 650 mm per annum in Regions I to III, while in Regions IV and V, rainfall is below 650 mm per annum. Most of the agricultural activities are carried out in Regions I, II and III, which have favourable climatic conditions for intensive crop and animal production, while extensive livestock production and irrigated crop farming (such as sugarcane) are suitable in regions IV and V.

² Diao, X., P. Hazell, D. Resnick, and J. Thurlow. 2007. The Role of Agriculture in Development: Implications for Sub-Saharan Africa. IFPRI Research Report No. 153. Washington, DC: International Food Policy Research Institute.

³ ZIMVAC 2017. Vulnerability Assessment Committee (ZimVAC)/Zimbabwe Food and Nutrition Council (ZFNC).

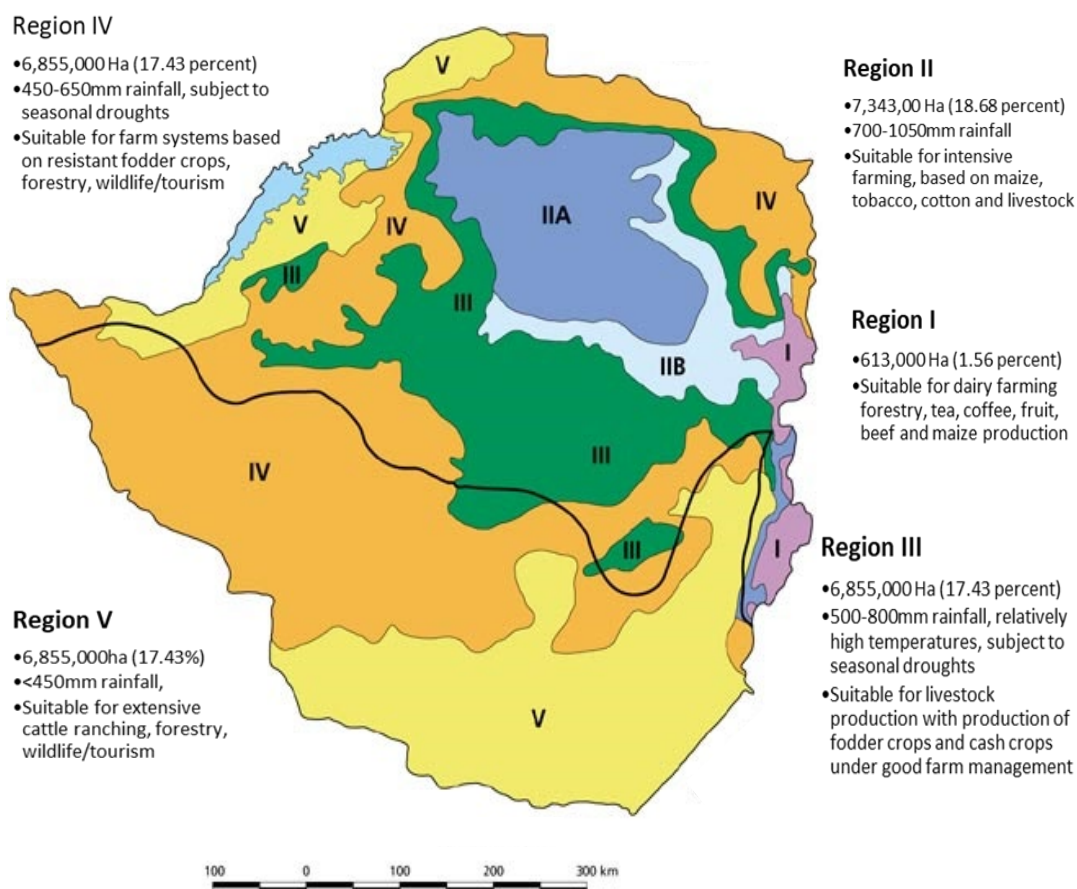


Figure 5: Description of the natural regions of Zimbabwe

Of the 39.6 million Ha of land in the country, about 42.1 percent is utilized for agriculture, with about 2 million ha of land suitable for irrigation, but not fully harnessed. Less than 50 percent of this is currently equipped for irrigation out of which about 123,000 Ha is currently irrigated mostly by commercial farmers and smallholder irrigation projects. Hence, the potential for the sector is staggering. The diverse agro-climatic conditions enable the country to grow a large variety of crops, with over 23 types of food and cash crops and a variety of livestock species. In addition, the country is endowed with diverse genetic resources that are extremely important for food and agriculture. Genetic resources afford the nation a source elite germplasm for varietal improvements against disease, yields and climate proofing. The Genetic Resources and Biotechnology Institute (formerly the National Genebank of Zimbabwe) conserves a total of 6333 accession of plant genetic resources.

The Government of Zimbabwe (GoZ) recognizes that agriculture is one of the key priority sectors in achieving sustainable economic growth and poverty reduction. However, frequent droughts plus limited resilience, inadequate resource allocation to key drivers of agriculture growth and sometimes inconsistent and ad hoc policy actions associated with the agricultural sector have made it impossible to achieve the stated goals.

2.2 Public Expenditure and Policy

Maize remains a strategic food staple and has continued to occupy a central position in the public expenditure and consumption. For decades, the country has pursued policies aimed at achieving national maize self-sufficiency, primarily driven by public investments in maize, input subsidies, and output market support. Because of this policy focus, maize now dominates smallholder production systems and absorbs the vast majority of agricultural public spending. Socio-economic and fiscal challenges associated with an undiversified, maize-focused agricultural sector suggest an urgent need for practical strategies that can enable more household-level movement into a wider range of agricultural production options.

The quality of agricultural public spending plays a major role in agricultural growth, development and rural poverty reduction. Provision of public goods, through investments in agricultural research and development, extension services, and rural infrastructure are key to achieving sustainable long-term agricultural growth and poverty reduction. However, the ability of an agricultural sector to sustain broad-based, pro-poor development and food security is intricately linked to the stated priorities and actions of the public sector. Figure 6 shows the proportion of the national budget towards the agricultural sector since 1995 compared to the CAADP target of 10 percent, and Figure 7 shows the budget priorities within the MLAWCRR.

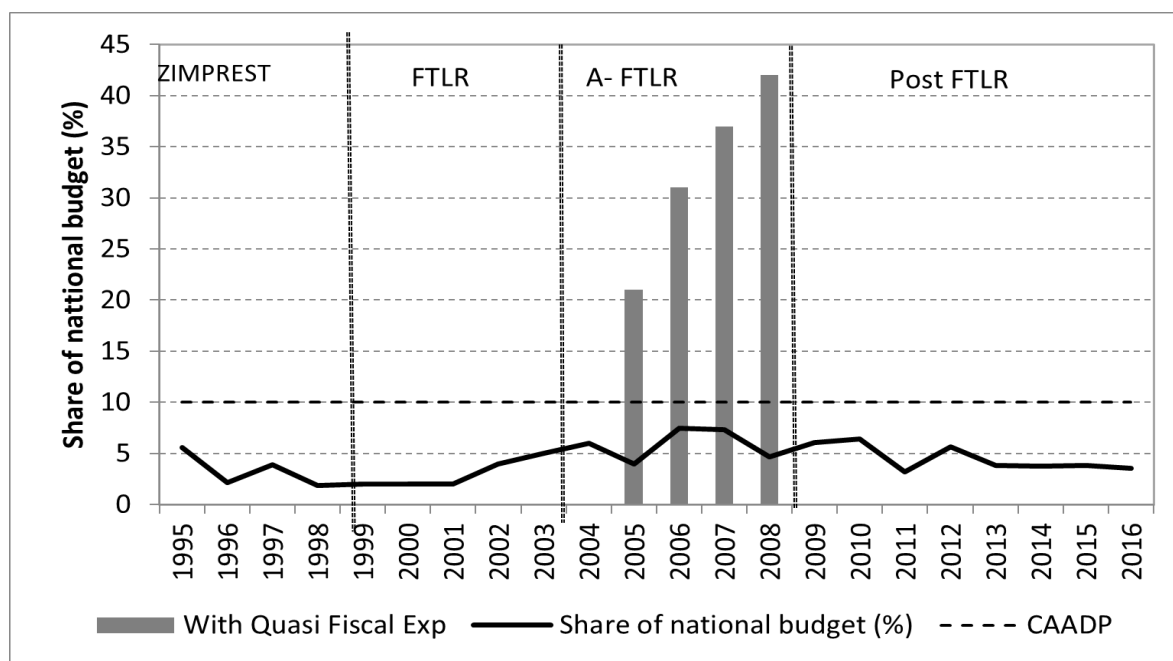


Figure 6: Budgetary allocation to the agriculture sector, 1995-2017

Source: Ministry of Finance and Economic Development (MoFED)

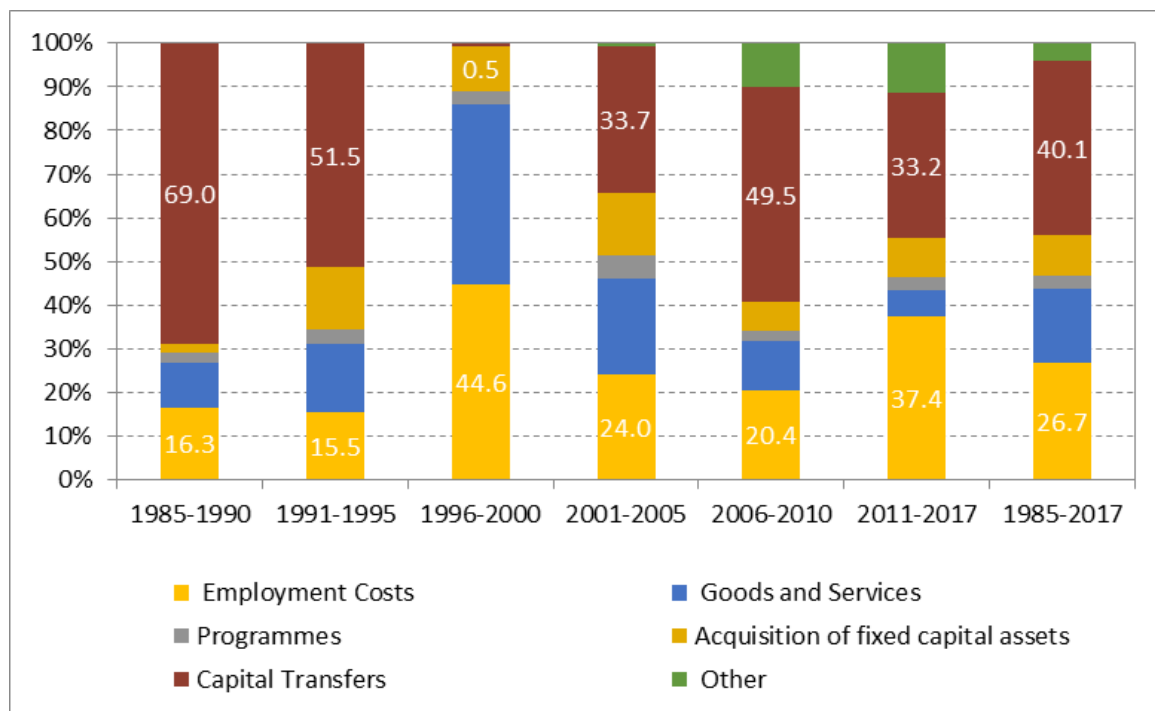


Figure 7: Trend in expenditure by line item (% of total agriculture ministry budget)

Source: Ministry of Finance and Economic Development (MoFED)

In general, the proportion of the agricultural budget has remained below the 10 percent CAADP target in most years, with the exception of 2005 to 2008 due to quasi-fiscal expenditure on agriculture in those years. Sustaining 10 percent allocation to the agricultural sector would be a significant initial step in availing more resources to the sector. Targeting public spending to key agricultural areas that directly affect the chronically poor will help Zimbabwe start to achieve meaningful rural poverty reduction.

In the period 1985 to 1995, budget allocations within the Ministry were dominated by capital transfers, thus above 50 percent of the budget was going towards input and output subsidies. This trend was reversed during the Zimbabwe Programme for Economic and Social Transformation (ZIMPREST) period when subsidies were stopped and more funds channelled to agricultural development programmes. After the FTLR, the proportion to capital transfers increased to more than 30 percent of the total budget, mainly because of the increased expenditure towards farmer input support schemes and cost of purchases for the Strategic Grain Reserve (SGR). Employment costs remain the second highest expenditure line, while expenditure to agricultural development programmes and extension has been declining.

Emerging evidence shows that consumption and expenditure patterns in both urban and rural Zimbabwe are changing (LFSP, 2017). Notably, periods of hardship and increased food aid were cited as major drivers of food consumption patterns as people adjusted to the changing economic and climatic conditions. Other drivers of change included knowledge, market access/availability, income, food prices and disease burden. This may indicate that food substitution is taking place and other commodities are slowly taking up the position initially occupied and dominated by maize. To be sustained, this requires a sustainable agricultural diversification policy and public expenditure that does not just focus on maize alone, but on

other grains whose demand is notably increasing and which also ensure balanced diets for nutrition. There is no doubt that agricultural expenditure and policies that are responsive to these changes will create opportunities for farmers to diversify into new and more lucrative crops and lead to a reduction in the import bill of food commodities not readily available in the country but preferred by consumers.

2.3 Agricultural Sector Performance in Zimbabwe

2.3.1 Agricultural GDP and value added per worker

Figure 8, shows the trend in the sector's contribution to GDP, and the agriculture value-added per worker (proxy for agricultural productivity). Since 1985, the contribution to GDP has ranged between 6 to 24 percent. The contribution of agriculture to total GDP has generally been declining between 1985 and 1991 (Pre-Economic Structural Adjustment Programme (ESAP)) from 20.7 percent to 6.8 percent. The contribution rose during the ESAP and ZIMPREST period peaking at 23.7 percent in 1999, before declining to 7.2 percent in 2004, following the FTLR program. Following the financial support to the agricultural sector by the Reserve Bank of Zimbabwe (RBZ) through the Productive Sector Facility (PSF) in 2004 and Agriculture Sector Productivity Enhancement Facility (ASPEF) in 2005, the contribution of agriculture to GDP recovered again and registered a peak of 24.2 percent in 2008, before declining again between 2009 and 2013 with a marginal increase of 1.1 percent in 2016.

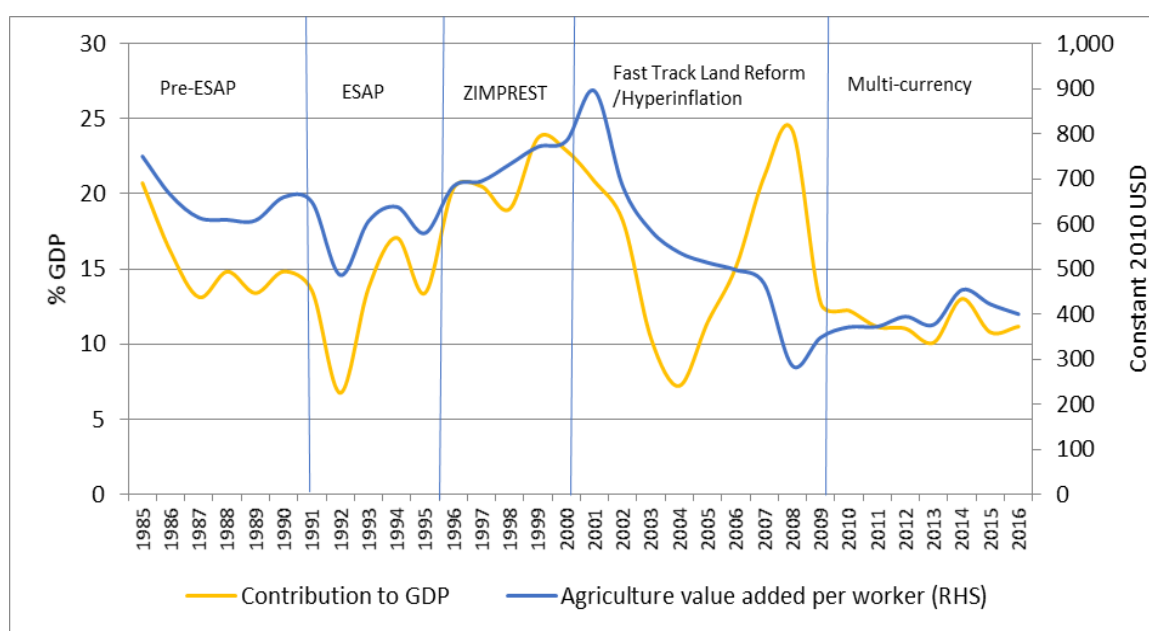


Figure 8: Agricultural contribution to gross domestic product (GDP), 1985-2016

Source: GDP data from ZIMSTAT and Value added per worker from World Bank.

Zimbabwe's declining contribution of agriculture to GDP has not been accompanied by increases in agricultural labour productivity or increases in the manufacturing sector respectively. The value added per worker in agriculture, a measure of labour productivity has continuously been declining, a sign of an ailing sector. The decline in agriculture GDP is mostly associated with the movement of the labour force from the agricultural sector into the informal service sector, but not increases in agricultural productivity. This trend shows that the agricultural sector in Zimbabwe continues to fail to stimulate growth in other sectors and create the necessary linkages required to transform the Zimbabwean economy.

2.3.2 Agricultural Production and Productivity

Crop and livestock production and productivity has significantly declined and remains too low to sustain agricultural growth. Several factors combine to engender low productivity and low production in agriculture. These include; low skills and knowledge base of farmers; a weak research, farmer training and extension system as a source of technology and innovation; shortage of inputs and equipment; low levels of mechanisation; reliance on rain-fed agriculture; limited access to market information and marketing facilities; limited access to finance; limited security of tenure; pest and disease attacks including the Fall Army Worm; *Tuta Absoluta* and *Theileriosis* in cattle; low capacity to manage post-harvest losses; mismatch between production and domestic consumption as well as increased incidence and intensity of climate shocks such as El Niño; *ad hoc* policy actions; and high costs of doing business (both formal and informal).

Hillbom and Svensson (2013) have asserted that no country has sustained a transition out of poverty and food insecurity without raising agricultural productivity. Through its effects on food and labour prices, agricultural productivity growth is the catalyst for broader processes of economic structural transformation in predominately agrarian societies (Johnston and Mellor, 1961). Therefore, raising agricultural productivity for both crops and livestock must be considered a critical dimension of any economic growth and poverty reduction strategy in Zimbabwe.

2.3.2.1 Crops sector

The main food and cash crops in Zimbabwe include maize, wheat, small grains (millet and sorghum), legumes, soya beans, sunflower seed, tobacco, cotton, sugarcane, horticulture (food and non-food) and groundnuts. Figures 9a and 9b show that crop production in the country is highly variable due to the heavy reliance on rain-fed agriculture. The changing climatic conditions and frequent droughts contribute heavily to the volatility in crop production. With the exception of tobacco, production of maize, sorghum, millet and other cash crops has continued to trend downwards compared to 1985 production. At the centre of this reduced production is very low productivity and absence of reliable markets. Average productivity of both food and cash crops across all farm types declined between 1985 and 2016. For example, maize yields declined from an average 1.2 metric tonnes per Ha (MT/Ha) between the period 1990 to 1995 to an average of 0.749 MT/Ha between the period 2010 to 2016 owing to the FTLR Programme, economic hardships and adverse weather shocks. These yields have lagged behind those of neighbouring countries such as Malawi, Zambia, Mozambique and South Africa. This story is the same across most food and cash crops, a situation requiring urgent attention.



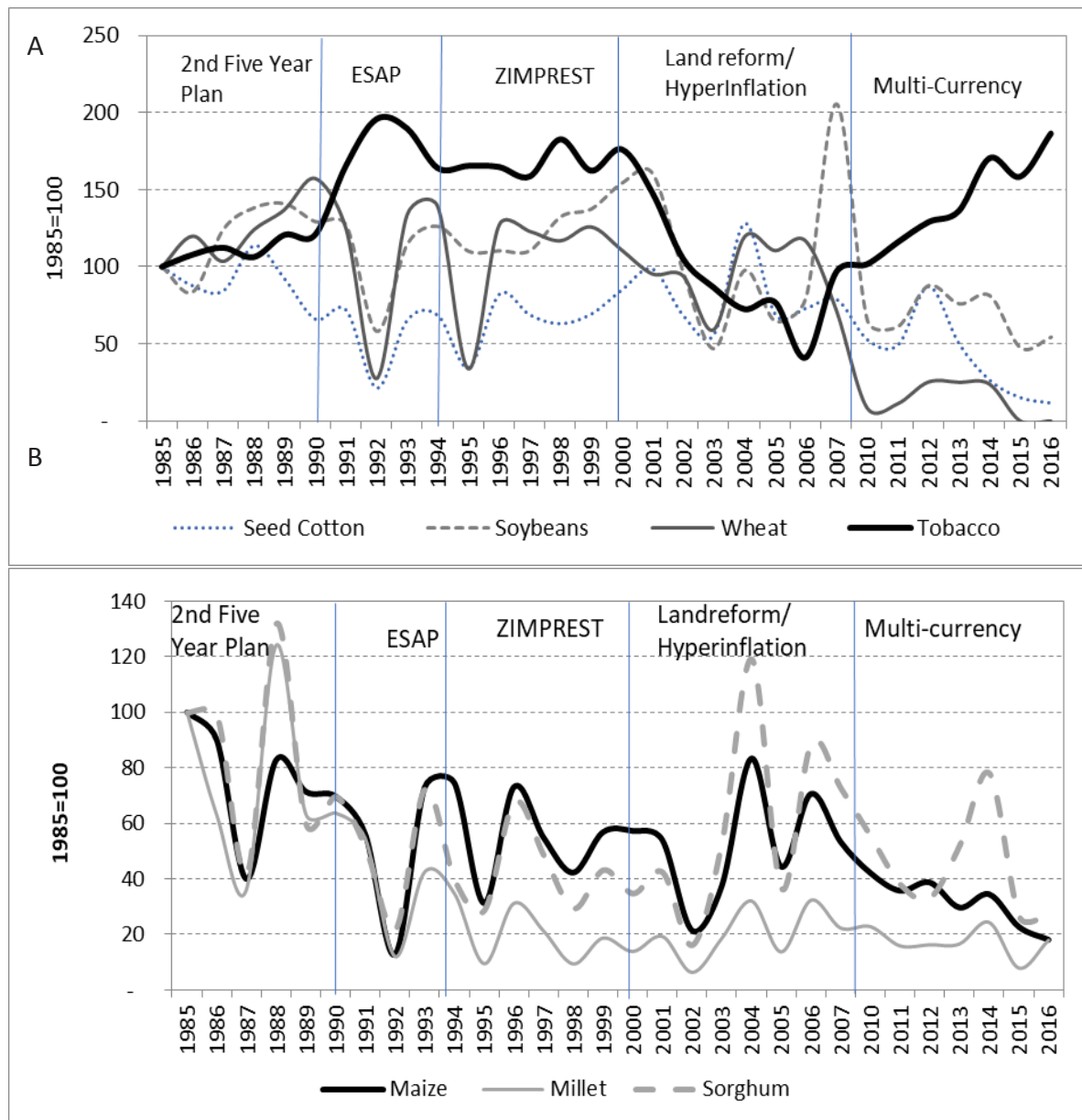


Figure 9a and 9b: Crop production in Zimbabwe, 1985-2016

Source: FAOSTAT (1985-1993), ZIMSTAT (1993-2014), 2016 Government of Zimbabwe Crop Assessment report

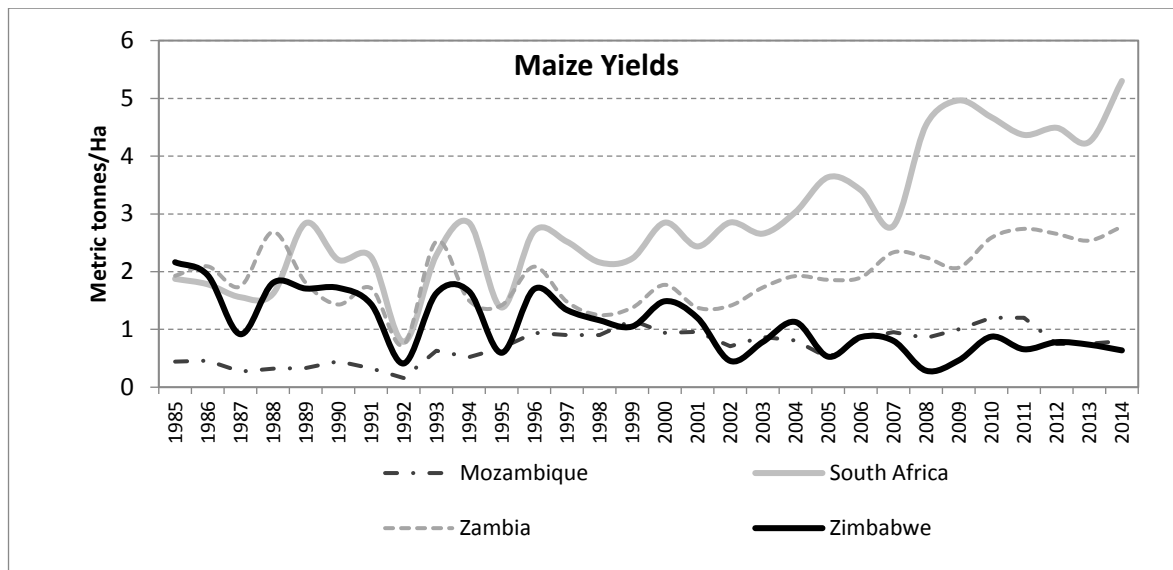


Figure 10: Regional maize productivity (yields), 1985-2014

Source: FAOSTAT (1985-1993), ZIMSTAT (1993-2014) and 2016 Government of Zimbabwe Crop Assessment report.

2.3.1.2 Livestock Sector

The livestock sub-sector is an important and integral part of the agricultural sector comprising beef, dairy, small ruminants, pigs, poultry, apiculture, aquaculture and other small and emerging stock. The sub-sector contributes about 19 percent to the agricultural GDP (Figure 4, in section 1).

The introduction of FTLR, combined with significant fluctuations in the macroeconomic conditions and a transformed agricultural sector post 2000 influenced major changes within the livestock sector. The land redistribution exercise has increased the participation of more than 300,000 newly resettled farmers with varied skills and resources in livestock farming. This transformation of the livestock sector has led to substantial shifts in livestock ownership and management; and associated effects on animal disease management, production and marketing. Changes in land use patterns following land reform have also influenced livestock production patterns with some former cattle ranches sub-divided into smaller units for mixed cropping and livestock production.

The livestock herd sizes nationally declined by about 20 percent for beef, over 83 percent for dairy, 26 and 25 percent for pigs and small ruminants respectively (Binswanger-Mkhize and Moyo, 2012). On the other hand, the productivity of smallholder cattle herds remains very low, with average calving rates of about 45 percent against a potential of 60 percent and off-take rates of about 6 percent against a recommended 20 percent. Therefore, successful transformation of the smallholder livestock sub-sector into a fully commercialized system with increased output and productivity to meet the increased demand for animal protein and surplus for export requires a more appropriate policy environment.

2.4 Emerging Challenges of the Agricultural Sector

Traditionally, the tendency has been to cast the strategic initiatives of the policy framework in the form of an enumeration of policy categories accompanied by a list of policy issues, and their related objectives and initiatives [statements]. This approach would be an appropriate response in circumstances where the

National Agricultural Policy Framework

policy related problem to be addressed was identified as “the absence of agriculture-related policies to promote and support the growth of the agricultural sector”. However, in Zimbabwe, the major problems to be addressed by the proposed policy framework relates to low institutional and human capacity and the lack of a stable and enabling legal, policy and institutional framework, leading to diminished investor confidence in the agricultural sector, and resultant low levels of agricultural productivity and production. This therefore calls for the formulation of interventions that enhance both institutional and human capacity and the legal, policy and institutional framework; hence enhance confidence and the flow of investments into those areas that are critical to generating and sustaining the growth of the agricultural sector with a decided focus on increasing agricultural productivity and production. To do this, the NAPF presents emerging challenges under nine pillars presented in Figure 11 below.

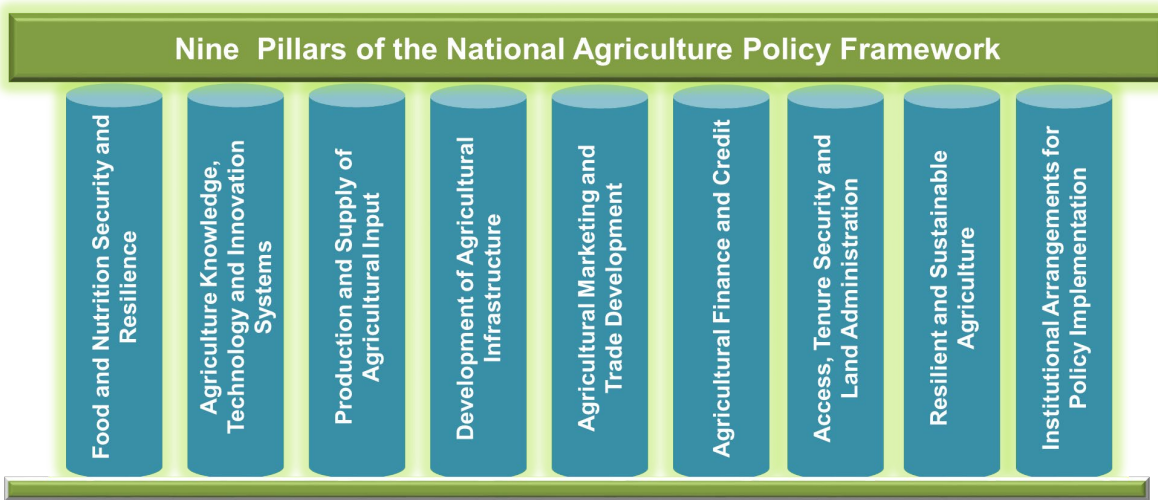


Figure 11: NAPF Pillars





2.4.1 Food Security and Nutrition and Resilience

Zimbabwe has some of the highest levels of food insecurity in Sub Saharan Africa regardless of the outcome of the agricultural season. Approximately 70 percent of the population relies on subsistence and rain-fed agriculture for their livelihood and food and nutrition security. Since the 1980s, the sector is dominated by smallholder farmers, tilling an average of one Ha per household, and producing an average of 0.4-0.6 MT of maize, of which up to 30 percent is lost due to poor post-harvest technologies and practice. The high reliance on subsistence rain-fed agriculture renders a large majority of the rural population vulnerable to climate-related shocks and seasonal stressors. Based on ZimVAC reports, these households have few sources of income other than agriculture and spend more than 54 percent of their budget on food.

A prominent goal of the GoZ has been to ensure food security by supporting maize production and marketing by paying above market producer prices and direct sales to large scale millers at subsidized prices, to ensure lower consumer prices and a reduced import bill. Although these subsidies are intended to incentivise production, they tend to benefit middlemen with access to transportation and the Grain Marketing Board (GMB) as well as larger farmers who have the ability to produce big marketable surpluses. The above market prices offered to surplus producers disadvantages the majority of smallholder farmers who rely on the market for their food needs. As a result, a large segment of the rural population rely on Government-run or donor-based seasonal food and non-food safety net interventions for their food and nutrition security. In addition, the country is facing a triple burden of malnutrition: under-nutrition, over-nutrition, and micro-nutrient deficiency among children.⁴ A typical maize-based diet leads to poor dietary diversity and insufficient consumption of essential nutrients.

2.4.1.1 Implementation of nutrition policies

Food and nutrition insecurity is a function of a combination of low productivity among smallholder farmers, limited capacity in post-harvest management, poverty, and inadequate access to nutritious and safe food throughout the year. This is compounded by limited access to clean water and sanitation services which in the absence of both preventative and curative health services exposes the poor to disease and ill-health.

A recent review of the food security and nutrition policy framework established that in the combination of the Food and Nutrition Security Policy, Social Transfer Policy Framework, and the Infant and Young Child Feeding Policy, Zimbabwe has an adequate policy framework and appropriate institutional structures to address food and nutrition security challenges. However, there are challenges regarding implementation of various policies and programmes arising from the absence of a single institutional entity that has the authority and capacity to drive the food security and nutrition agenda in Zimbabwe. Many instruments and operational guides which need to be harmonised include the National Visions for Development, the Food Deficit Mitigation Strategy, the National Food Fortification Strategy, the National Nutrition Strategy, Scaling up Nutrition Movement and the Zimbabwe Drought Risk Management Strategy.

⁴ The results of the 2012 Micronutrient Survey (MNS) showed that anemia and Vitamin A deficiency affected 31.5% and 21.2% of children under five years respectively, while 25.8% of women were anemic and 23.9% were Vitamin A deficient (MoHCC/ZFNC, 2012).

2.4.1.2 Micro-nutrient malnutrition

Dietary diversification, supplementation, commercial fortification, and bio-fortification have been identified as the key nutritional interventions that can address the burden of micronutrient deficiencies worldwide. In Zimbabwe, this burden is such that anaemia and Vitamin A deficiency affect 31.5 percent and 21.2 percent of children under five years respectively, and 23.9 percent of women are deficient in vitamin A and 25.8 percent of women are anaemic. Further, child stunting and deficiencies in vitamin A, Iron and Zinc affect one in every three children.

Agriculture plays a critical role in addressing this national public health challenge. The fact that the majority of Zimbabwean households consume food that they produce presents an opportunity to use the strategy of biofortification to meet the micronutrient needs of the country. A focus on production of biofortified crops such as orange-fleshed sweet potatoes, orange maize, iron beans etc. will not only further the diversification agenda within the agricultural sector, but will also help to deal with issues of access to nutrient-dense foods that are critical in tackling micronutrient deficiencies. However, a multi-pronged approach is required. In addition to biofortification, farmers must have the capacity to deliver more nutritious foods to the table through improved practices such as soil nutrient management, diversification of production, inclusion of traditional and under-utilised species, and post-harvest technologies that reduce nutrient loss. At the same time, consumer behaviours must evolve towards more diversified and nutritious diets, supported by evidence-based education, communication and marketing campaigns for nutritious diets. Furthermore, supermarkets and other food suppliers must ensure adequate food quality standards, since – particularly with the desired economic development – more and more Zimbabweans will be consuming purchased food.

Zimbabwe's biggest requirement given the available policy and institutional frameworks for biofortification is the rationalisation of its implementation in a holistic manner and focusing on how to deal with micronutrient deficiencies across the sectors. This gives an opportunity for the NAPF to align its priorities in addressing food and nutrition security with the Biofortification Strategy, to especially capture the households that are left out of public health interventions such as commercial food fortification and micronutrient supplementation.



2.4.2 Agricultural Knowledge, Technology and Innovation Systems

The Agricultural Knowledge, Technology and Innovation Systems (AKTIS) has traditionally been anchored on agricultural research, education and extension services and facilitated a fairly robust agricultural sector in Zimbabwe. However, concerns have been raised regarding the extent to which existing AKTIS has developed in tandem with changes in state of the art knowledge, technology and innovations, the integration of market-centric and business-facing agricultural practices, emerging global opportunities and challenges as well as responsiveness to the needs and demands of actors in the agricultural value chains. For example, the ICT revolution still has to be fully embedded in the agricultural sector.

AKTIS in Zimbabwe is largely driven by investment in agricultural research, education and extension systems from the public sector, academia and non-state actors. These systems are used as the main way in which knowledge is exchanged and disseminated across the agricultural value chain. The use of these systems has been facilitated through support from all actors in the value chain i.e. government (public) systems (research and extension departments), private sector actors, development partners, academic and research institutes, and farmers associations. However, informal knowledge networks are fast replacing formal networks as the main drivers of this communication due to inadequate investments in the development of these systems.

2.4.2.1 Agricultural education and farmer training

Agricultural education and farmer training is an integral part of human capital development that is interdependent on agricultural growth and development in the country. The post-FTLR led to an increase in the number of communal farmers from 44 percent to about 74 percent. This increased the need for agricultural research, technology and extension provision, and more human skills and development to respond to this new demand.

Agricultural education in the country is currently provided by 8 public agricultural colleges spread across all the provinces. They offer diploma and certificate level training in the areas of: Crop and livestock production; commercial farming; animal health; meat and livestock classification; and disease control. In addition, private colleges supplement government efforts, especially in areas covering export commodities. There are 10 public universities, on average one per province, providing agricultural education at graduate and post-graduate levels.

There are also programmes designed to upgrade National Certificate holders to Diploma Level through modular training aiming to further technical proficiencies in agriculture towards meeting the demands of an evolving sector. Currently, about 330 students are enrolled under this upgrading programme at Chibero, Esigodini, Gwebi, Mlezu, and Rio Tinto colleges. Meeting the demand for qualified staff has seen the advent of programmes such as the Young Commercial Farmer Training at Kushinga Phikelela National Farmer Training College that is designed to train students who leave the college with hands-on skills in agriculture. It is the National Farmer Training Centre and plays a coordinating role in farmer training.

However, the main challenges for agricultural training institutes include insufficient funding to efficiently run their programmes. Furthermore, they have inadequately trained staff to respond to the many sectoral changes and needs and have limited support services in terms of modern infrastructure, industrial attachments, and collaborations with public and private national, regional and international partners. A

comprehensive review of the national agricultural education and farmer training programme is urgently required in order to fully respond to the needs of the present day farmer. The curricula needs to be continuously upgraded and updated to meet the pressing challenges, for example, through courses on, and mainstreaming of, nutrition, agroecology and climate-smart agriculture.

2.4.2.2 Agricultural Extension

Like research, agricultural extension and advisory services play a pivotal role in imparting practical knowledge and skills to farmers and is one of the key drivers of agricultural growth. Extension services in the country is provided by the government through the Agricultural Technical and Extension Services (AGRITEX) at no direct charge to farmers. AGRITEX public extension system was once very effective and efficient, but due to the structural reforms of the 1990s, the HIV/AIDS pandemic, the economic crisis of the 2000s and the increased demand for extension services after the FTLR Programme, the performance of the system has deteriorated drastically. Currently, there are about 4,200 extension workers servicing approximately 1,800,000 farmers; making the farmer to extension ratio about 800:1. A fast-track extension agent training programme was introduced to meet the rising demand for extension services by smallholder farmers. However, most of the graduates from the programme lacked adequate practical proficiency. As a result, the system has even become more inefficient in service delivery.

The functioning of agricultural research and extension services have been plagued with insufficient resources from government budgetary allocations. The allocations fall short of the CAADP recommendation of investing at least 1 percent of agricultural GDP to agricultural research and extension. A huge proportion of the budget allocation to research and extension currently goes towards staff salaries and emoluments. For example, Figure 12 shows the trend in budgetary allocation for agricultural research, technical and extension services since 1984. The allocation of funds has dramatically reduced since 2013, with 2016 and 2017 having had some of the lowest funds availed to them.

The budgetary constraints have significantly reduced research activities and the mobility of extension workers for extension activities, in-service training to stay up to date with technological advances, and procurement of basic research and extension equipment. On the other hand, linkages with other relevant institutions like extension, universities, private sector and farmers unions/associations are weak and, in some instances, non-existent. This has a negative effect in the dissemination of the research results and adoption of new technologies. There is great scope for modernisation and digitalisation of extension services to stay in touch with international trends and restore AGRITEX to its former supremacy as a reputable centre of excellence for agricultural transformation.

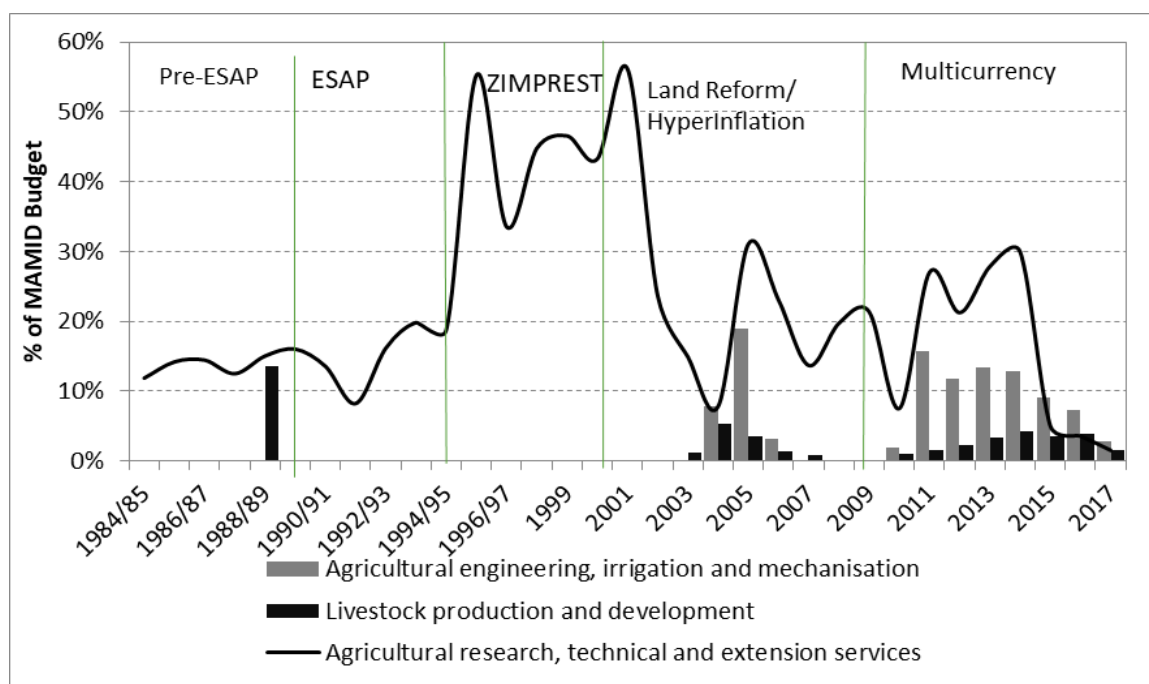


Figure 13: Allocation to Key Drivers of Agricultural Growth (1984-2016)

Source: Budget Estimates Ministry of Finance

2.4.2.3 Agricultural Research

On agricultural research, the Agricultural Research Council (ARC) is mandated with coordination, while other government and non-government agencies are responsible for the implementation of research programmes. Agricultural research is dominated by government institutions with some falling outside the mandate of the Ministry responsible for agriculture e.g. the Scientific Industrial Research and Development Corporation (SIRDC). A number of research activities taking place are driven by the private sector (seed and fertilizer companies), academia (universities and colleges), and in some cases individuals using their own resources. There are a number of research institutions in the MLAWCRR under the Department of Research and Specialist Services (DR&SS) and Livestock and Veterinary Services that provide research-based technologies, and technical information for advisory services and products for supporting enhanced agricultural productivity and the production of various crops and livestock. These include the Crop Breeding Institute, Genetic Resources and Biotechnology Institute, Chiredzi Station, Grassland Research, Matopo Research and Central Veterinary Laboratory amongst others. There are other research institutions that fall under the Ministry but outside the DR&SS namely the Tobacco Research Board and the Pig Industry Board.

2.4.2.4 Modernizing Zimbabwe's AKTIS

Actors in agriculture value chains who present their challenges, needs and priorities expect them to be addressed in an integrated manner. Yet the practice by AKTIS institutions in Zimbabwe is to infuse their institutional research, education and extension priorities into work and compartmentalise the timing and delivery of their services to agricultural value chain actors. In addition, the content, methods, and tools that are used to deliver the knowledge, technology and innovation services do not reflect the challenges

that are faced by the agricultural value chain actors in relation to time, place and target groups. Invariably, smallholder farmers - the majority of which are women and the youths, are underserved by the system.

A framework is therefore required to create a more vibrant, inclusive and sustainable agricultural sector using an institutional model that embraces multi-level partnerships; the principle of subsidiarity in delivering efficient and responsive agricultural services; the need to monitor and evaluate planned and implemented actions for sustainability and impact; and to share lessons and good practices to improve policy and practice anchored in good governance and sustainable funding models. The system must also address social, economic and environmental imperatives and opportunities faced by smallholder farmers especially those in agro-ecologically marginal and environmentally sensitive rural areas.

The NAPF emphasises joint planning and implementation strategies for agricultural research, education and extension. It challenges the current set up in which institutions responsible for knowledge, technology and innovation development and dissemination, fall under different departments and have limited interaction. The compartmentalisation of these responsibilities tends to limit interaction and sometimes leads to duplication of activities and wasting of resources. Coordinated planning will enhance the use of limited resources; improve relevance, timeliness, and effectiveness of knowledge, technology and innovation services.

A critical success factor is the integration of institutions by creating multi-stakeholder Agricultural Knowledge, Technology and Innovation Platforms [AKTIPs] at national, provincial and district levels. The AKTIPs will provide an avenue for joint planning, joint research agenda prioritisation, execution and evaluation of interventions. The composition and operation of AKTIPs will be based on the principles of:-

- Demand-driven responsiveness to the needs of all agricultural value chain actors;
- Inclusiveness of stakeholders to enable men, women and youths to be equal participants in decision making;
- Equity of all participants as partners in agricultural research, education and extension based on mutual interaction and interactive learning among stakeholder groups;
- Consensus orientation where priorities are agreed upon by all stakeholders, particularly the end-users of the knowledge, technology and innovation services; and
- Accountability to enable knowledge, technology and innovation providers and consumers to interrogate and design accountability systems in the way the services are designed, packaged, delivered and evaluated.

The notion of value chain mapping, development, and implementation management is to be fully embraced. Research, academic, and extension workers will need to be equipped with adequate knowledge, skills, training material, transport facilities, and modern technology in line with global trends. Good practices developed and lessons learned from the experiences of AKTIPs as integration models will be used to inform policy development and to realign knowledge, technology and innovation institutions for greater efficiency and effectiveness.



2.4.3 Production and Supply of Agricultural Inputs

Zimbabwe's agricultural productivity remains dismally low. The low productivity is partly driven by the low investment in time, working capital and productive assets which result from a high perception of risks related to agricultural activities. Demand of, and access to agricultural inputs limit farmers ability to achieve high productivity. Therefore, increasing agricultural productivity requires improved access to and utilisation of productivity-sustainable agricultural intensification technologies such as water harvesting, irrigation, high quality appropriate seeds (hybrid or open-pollinated varieties), precision agriculture, system of crop intensification, organic and inorganic fertilisers and inoculants, veterinary drugs and – where biological methods are insufficient – other agrochemicals, and mechanization. However, such intensification efforts must be done with sustainability in mind given the impact of agriculture on the environment and vice-versa.

Since the onset of the land reform programme in the early 2000s, the agricultural sector has undergone a remarkable transformation, with a sharp decline in commercial production. The macroeconomic conditions have been unfavourable and this has had ripple effects across different nodes of the agricultural value chain. Generally, inputs are costly and unaffordable to farmers, while on the demand side, farmers and other value chain actors also face liquidity constraints in efforts to procure improved inputs. On the supply side, local production of inputs has been reduced owing to limited availability of foreign currency to facilitate acquisition of other intermediate inputs not locally available. Worse, low effective demand on the market does not inspire production.

Limited access to agricultural finance among the new farmers has also contributed to low demand, and low capacity utilisation among the agro-input manufacturers. Because of the unfavourable macroeconomic conditions, input distribution systems are inefficient, with agro-dealer networks not fully developed. Given this context, the increasing effects of climate change, natural resource degradation, fossil fuel depletion and market volatility, the NAPF must facilitate a rapid transition to more sustainable and resilient forms of agriculture that are less dependent on external inputs while at the same time enhancing productivity in nutritional terms (see section 2.4.8).

Challenges also exist in strengthening national agro-industrial complexes to ensure the supply of agricultural raw materials to industry in terms of quality and quantities required, and in relation to consistent and timely delivery. Industry must be capacitated to ensure consistent and timely supply of agricultural inputs like fertilisers, seeds, chemicals, agricultural equipment, livestock drugs and vaccines, and packaging materials to farmers as and when these are required. The agricultural policy and strategies should, therefore, ensure increased local input supply, utilisation, and access by all farmers by addressing both the supply and demand-side constraints, including the availability of foreign currency to input manufacturers, improved access to agricultural finance, and improved efficiency in input markets.

2.4.3.1 Input support programmes

Historically, the Government and some international donors instituted various supply-side programmes to provide agricultural inputs and facilitated access to both input and producer markets at highly subsidised prices or at no charge to smallholder farmers in communal areas. Government programmes included the Presidential Well-Wishers Input Scheme targeting smallholder farmers, Winter Input Scheme and Command Agriculture for crops and livestock. On the other hand, donors' agricultural input assistance

National Agricultural Policy Framework

programmes were aimed at complementing government programmes especially during the hyperinflation period in 2000 to 2008. The motivation behind this was that formal marketing channels for agricultural inputs had collapsed, making inputs unavailable or inaccessible, hence emergency relief input programmes were set up and characterised by the free distribution of inputs to vulnerable and poor households. The main shortcoming of these programmes is that they largely bypass the established agro-dealer networks. Moreover, they have provided a package that has primarily met household grain consumption needs.

While some aggregate macro and microeconomic benefits were realised in keeping a large proportion of smallholder farmers on the land and securing food security at household and national levels, these benefits have been outweighed by the long-term costs of undermining a robust and sustainable agricultural sector as programmes largely bypassed the established agro-dealer networks. A combination of inappropriately targeted and managed state-funded input supply facilities and pricing policies have engendered distortionary effects, resulting in the crowding-out of the private sector from participating in the agricultural input supply and marketing chains. The focus on maize as a staple remains important but should not come at the expense of medium to long-term investments in key drivers of agricultural growth or negate policy intentions targeting food and nutrition; agro-processing, and reduction of the national trade deficits.

In general, public input support programmes fail to deliver expected results due to administrative failures such as; delayed disbursement; inadequate packages; poor targeting, and rent-seeking behaviour by some sector players. In the absence of effective targeting of beneficiaries, a significant proportion of the benefits will accrue to farmers with inherent capacities to underwrite their business operations. This undermines efforts to transform stakeholder perceptions of agriculture into one of a market-facing and business-oriented enterprise. In view of these challenges, the GoZ will, therefore, support the move towards digital platforms for delivering subsidised inputs. A more flexible electronic voucher system among other new innovations would help place the decision of what inputs to use in the hands of the farmer, thus eliminating the cost of procurement and distribution by crowding in the private sector. The system will create opportunities for other services such as soil testing, and offer incentives to farmers that adopt climate-smart practices and technologies. The smart subsidies will be guided at the minimum by the following principles:

1. Promote agricultural diversification by putting the farmers in the driver's seat.
2. Support market development and private sector investment
3. Promote competition
4. Insist on economic efficiency and have an exit strategy
5. Promote pro-poor growth





2.4.4 Development of Agricultural Infrastructure

Agricultural infrastructure is crucial in improving both agricultural productivity and production. Access to affordable physical infrastructure such as irrigation, pre- and post-harvest storage, energy, transportation, telecommunications etc. is a major source of competitiveness within agricultural value chains. Zimbabwe is ranked 124 out of 137 global economies in terms of business competitiveness⁵. The global competitiveness index further shows that having an inadequate supply of infrastructure is perceived as the seventh most problematic factor in doing business in the country, and infrastructure scored 2.4 out of a potential 7.

For the agricultural sector, inadequate development, rehabilitation, and modernisation of agricultural infrastructure across all categories has been a large contributor to low productivity and production, and ultimately competitiveness. The RBZ has estimated that approximately US\$14.2 billion (bn) is required to close the infrastructure gap. However, the rate of recurrent expenditure is reducing access to the capital expenditure required to rehabilitate and develop infrastructure in the country.

2.4.4.1 Farm machinery and agricultural mechanisation

Limited access to agricultural machinery and implements is compromising timeliness of farm operations. For instance, the current national requirements for tractors and combine harvesters stands at 40,000 and 400 units respectively, against the currently available 14,000 tractors and 300 combine harvesters. This maintains the labour-intensive narrative about the agricultural sector in the country. Farm structures for both crops and livestock such as greenhouses, animal handling, crop produce handling, tobacco curing bans, sales pens, dipping tanks, storage facilities and machinery sheds as well as accessible roads are in a poor state and require rehabilitation. Insufficient skills in the use and maintenance of agricultural infrastructure and technology negatively impacts the lifespan of the agricultural infrastructure.

2.4.4.2 Irrigation and water management

Irrigation plays an important role in agriculture because it reduces farmers' vulnerability to weather and climate shocks and risks. Zimbabwe has potential to irrigate more than 2 million Ha of land and yet, less than 206,000 Ha are currently under irrigation. The utilisation of existing water bodies, underground water and transboundary water bodies such as Zambezi River and Limpopo River can make a significant contribution to food security and agricultural growth in the country, especially in drought periods. However, the available water bodies are currently underutilised, mainly due to lack of investment in irrigation development, rehabilitation and modernisation. This underutilisation is made worse by having inappropriate technologies that do not take into cognisance different farm sizes and other special considerations such as the sex, physical abilities, and age of the users. Efficient water management and environmental sustainability are major components of national irrigation development and resilience building, more so that climate change is reducing the amount of available surface and ground water.

2.4.4.3 Information and Communication Technologies

Information and Communication Technologies (ICTs) within the agricultural sector are being used to overcome the physical barriers that are typically present, such as the high farmer extension ratio that renders extension and market information systems inefficient. A solid and extensive telecommunications

⁵ World Economic Forum, 2018

network allows for a rapid and free flow of information, essential for the fast changing agricultural sector that requires real time information dissemination.

The growing connectivity and the widening ownership of smartphones provides an opportunity for farmers to access useful information in the face of inadequate and/or poorly resourced extension staff. The ICT sector in Zimbabwe contributed 15.2 percent to the GDP in 2013 and active mobile phone subscriptions are estimated at 13,799,648 as of the third quarter of 2017. It is estimated that 94 percent of the population has access to mobile phones. The subscription numbers however do not take into account people with multiple mobile numbers and of these, less than half have access to the internet. Currently, AGRITEX are working on the development of a short message service (SMS) platform that is able to deliver pre-planting, growing, harvesting, post-harvest and marketing information, and providing agricultural information, financial services, crop insurance and market linkages with ECONET Services through Ecofarmer. Other innovations include e-Mkambo, Zimbabwe Farmers' Union bulk SMSs, and emails and newsletters. About 650 telecommunication towers are scheduled to be built in remote areas using resources from the Universal Services Fund. Even with these innovations, the MLAWCRR is still ill-equipped for digital technology and the situation is worse for their target market, the farmers. The penetration of ICT use within the sector is still very low and some rural areas still have no network access. Therefore, there is enormous scope for the MLAWCRR to work with the Ministry of ICT and Cyber Security in digitising the entire agriculture sector in ways to improve service delivery.

2.4.4.4 Energy and agricultural development

Access to affordable and reliable energy for agriculture across the value chain is critical to ensure competitiveness and comparative advantage of agricultural commodities within and outside the country. Zimbabwe is currently experiencing energy challenges with supply being unable to meet this demand. This is due to inadequate investment in the sector and this has led to erratic supply. Energy production in Zimbabwe stands at 9,709 Gigawatt hours (GWh), with the hydropower (4990 GWh) contributing the most followed by coal (4542 GWh), Biofuels (129GWh) and Oil (48 GWh). The advent of climate variability has led to increased incidents of droughts that negatively affect hydro-power generation at Lake Kariba which accounts for about 80 percent of all hydropower generated in the country.

Currently, only 40 percent of the population has access to electricity. Of those accessing electricity, only 21 percent are from the rural areas. In closing this gap in energy supply, there are some investments that have been/are being made. For example, the expansion of the Kariba South Hydropower Station (US\$319m) slated for completion in 2018, the planning of the Batoka Gorge Hydropower Station (US\$2.9bn) in collaboration with Zambia, the Hwange Thermal Power Station (US\$1.5bn) that is expected to be completed by 2021, and the Solar Power Plant in Gwanda (US\$202m) are some of the initiatives expected to close this gap. However, despite the investments underway, fuel wood continues to provide about 53 percent of the total energy in the country. About 63.5 percent of households depend on fuel wood for their cooking requirements, technologies that are energy inefficient and pose some health risks. Unfortunately, communal areas that have the larger supply gap, are facing wood fuel shortages due to clearing of land for agricultural production and unsustainable harvesting of the fuel wood. The country's abundant renewable resources for sustainable energy production are barely exploited despite these challenges. There is high potential to invest in renewable energy (bio digesters, mini-hydro, solar energy, solar water heaters, bioethanol and biodiesel) as an essential development strategy to stabilise access

and reduce costs in energy access, even if the initial set up of these alternatives may be capital intensive. Rural electrification will spur rural development and creation of agro-enterprises thereby providing diverse employment opportunities for women and youth in the rural areas.

2.4.5 Agriculture Markets and Trade Development

In recent times, agricultural marketing has become an issue. Market infrastructure requires investments, and the ease of doing business has been worsened by the introduction of many taxes and levies leading to over-regulation of the sector. The cash situation in the country is dire and the use of the United States dollar as the currency of exchange and trade has made Zimbabwean goods uncompetitive including agricultural products. There is also high price volatility for major commodities, partly driven by lack of guiding principles in agricultural marketing and trade. Accordingly, agricultural policy's focus in marketing and trade should be directed at improving the cost of doing business, facilitating access to and generation of foreign exchange, market infrastructure development, facilitating access to local and foreign markets, and improved predictability of marketing policies. To revitalise Zimbabwe's marketing systems, both public and private sector investments are required in soft and hard market infrastructure including feeder roads, structured wholesale and retail markets, cold and dry storage and ICT platforms.

2.4.5.1 Predictable and consistent market and trade policies

Inconsistencies in marketing and trade policy space is one major source of risk for the agricultural sector, which usually involved discretionary and government intervention in the market particularly for maize—the main staple. The main policy responses over time have been trade restrictions (import and export bans) which often have led to the government supporting above market prices. The impact of such trade instruments on price volatility has often resulted in negative impacts on food security, poverty, and foreign exchange earnings. The major concern arises when export or import bans/restrictions result in extreme price volatility which adversely affects planning among private sector actors. The stop and go marketing policy has been at variance with the commitments made by Zimbabwe in the ZAIP. Hence, the Government needs to ensure a stable and predictable policy environment to stimulate sustainable private sector-led market development.

2.4.5.2 Role of the Grain Marketing Board

The GMB is mandated to ensure the maintenance of the strategic grain reserves with a capacity of 500,000 MT and with additional funds to allow import of up to 450,000 MT. The current maize pricing policy in Zimbabwe is rooted in a historical context. A prominent goal of the Government has been to ensure food security by supporting maize production and marketing by paying above market producer prices and direct sales to large-scale millers at subsidised prices, to ensure lower consumer prices and a reduced import bill. The above-market producer prices are supported by direct grain purchases through a network of GMB depots and restricting direct farmer sales to other buyers.

Nevertheless, this approach has not been sustainable because it requires huge Treasury support precluding other critical investments. In addition, GMB social and commercial activities fail to foster private sector-led investments as the government subsidises the Board's activities in terms of procurement, storage, and distribution. However, private sector financial resources if harnessed creatively, would ensure food security without putting a strain on Treasury.

Going forward, the utilisation of the SGR will be transparent. In particular, a comprehensive Cereal Balance Sheet incorporating all the key sources of cereals i.e. production, stocks and imports will be shared with the stakeholders to facilitate informed decision making. The social and commercial activities of GMB will be reviewed to ensure that its operations are in line with the food security and market development objectives. Government will create an enabling environment for the private sector to flourish so that all types of farmers are served cost effectively.

2.4.5.3 Commodity Exchanges and Warehouse Receipts System

Despite the passing of the Warehouse Receipt Systems (WRS) Act in 2003, WRS was never operationalised. The demise of the Zimbabwe Agricultural Commodity Exchange that existed prior to 2000 curtailed the establishment and operation of formal and licensed WRS. Nevertheless, some forms of WRS-like warehousing are currently in use, but these are mainly third-party trader-operated storage facilities. The operationalisation of WRS is thus key to unlocking the potential of more effective agricultural finance to different farmer types in Zimbabwe. The GoZ will play a critical role in promoting the use of warehouses and investment that will lead to operational Commodity Exchanges in the country.



2.5.6 Agricultural Finance and Credit

Agricultural financing is critical for the revival of the agriculture sector. At farm-level, it facilitates the adoption of improved varieties of crop and livestock, and the purchase of other inputs. However, statistics suggest low levels of financial flows from commercial sources to the agricultural sector. The agricultural sector's share of commercial lending has been gradually declining, from 19 percent in 2012 to 16.7 percent in 2017, despite the value of loans to the sector rising. A number of factors explain the observed trend. These include the inherent risk of agricultural production that contributes to the high cost of finance, inappropriate loan portfolios and low financial literacy levels for farmers, lack of collateral among smallholder farmers, high transaction costs, and limited affordable lines of credit in the country.

2.3.6.1 Financial inclusion

The national financial inclusion strategy seeks to address some of these challenges through addressing both supply and demand side constraints. The government is also implementing various fiscal and monetary interventions to support the agriculture sector including export incentives. Further, land can be used as collateral but even this has its challenges. While the 99-year leases are now bankable, the leases are still minimal and yet to inspire confidence among banking institutions. This leaves movable assets as the most readily acceptable collateral. However, few farmers, especially communal farmers, have such movable property usable as collateral. The absence of the Warehouse Receipts System is presenting challenges to farmers who would have wanted to use stocks as collateral and its implementation could improve the marketing system of agriculture commodities.

Public sources of agricultural finance such as the Presidential Input Support Programme attempt to fill the financial gap. However, as observed across many African countries, these programmes tend to exert a lot of pressure on the Treasury due to the lack of an exit strategy. To ensure sustainability, there is a need to draw lessons from inclusive development finance models that have been trialled in the country and establish smart finance models for the country.

2.5.6.2 Innovations in agricultural finance

Contract farming

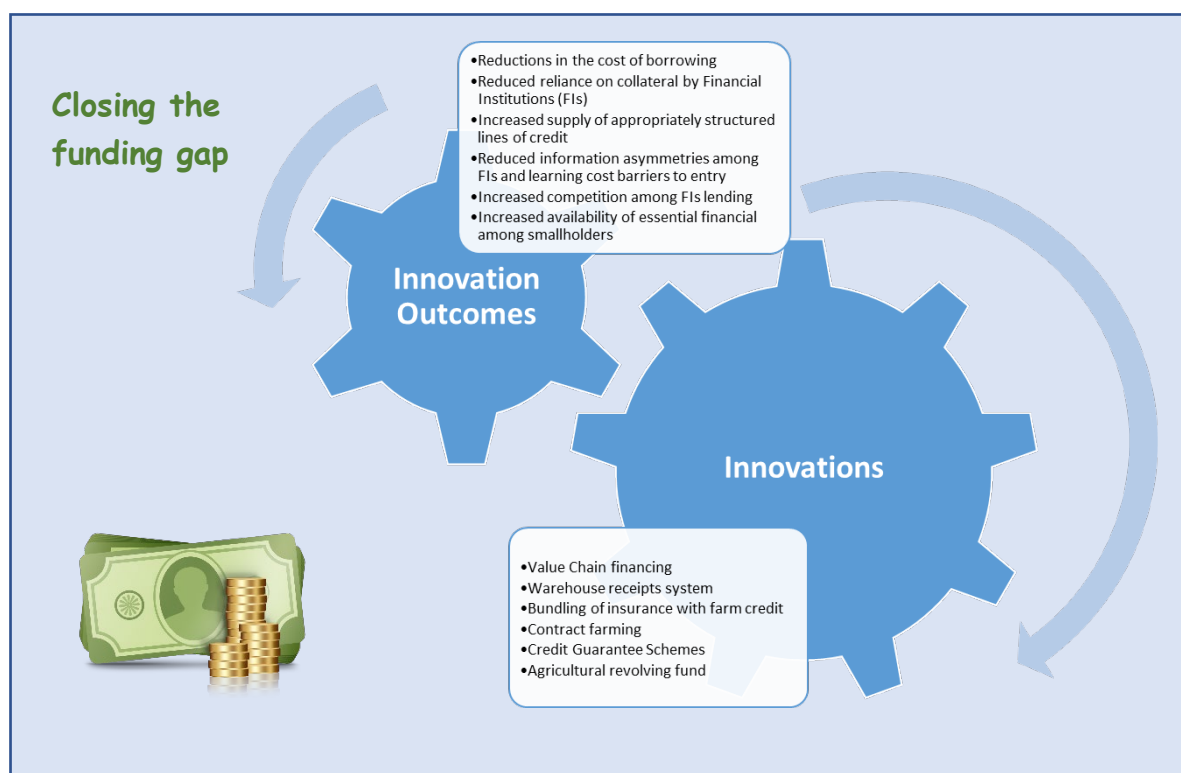
Contract farming has proven to be one of the successful funding models for agriculture, especially for tobacco and cotton. However, the existing contract farming regulatory framework is inadequate. Specifically, the existing Stop Order Act has failed to attract adequate funding towards other commodities because the financier is not fully empowered. The Ministry will advocate for the review of the Act to facilitate increased finance flows through value chain financing, with financiers enjoying some tax incentives.

Agricultural insurance

Currently, agricultural insurance uptake is very minimal, exposing farmers to climate change risks among other hazards, making the industry risky for financiers. As a result, deliberate efforts will be made to sensitise farmers on insuring their activities and to bundle different risk mitigation options. Also, the insurance industry has to re-invent itself in order to be relevant for a dynamic agriculture sector in a changing climate.

2.5.6.3 Funds mobilisation

Access to public and private sector sources of finance and credit is key to sustaining the growth of the agricultural sector. The government remains a significant financier of agricultural activities. However, owing to the limited fiscal space support, funds should be directed towards vulnerable households, and critical agriculture infrastructure activities including extension services and research, among others. Government's role should also be confined to facilitating mobilisation of affordable lines of credit and paying for public goods or ecosystem services. On the other hand, private sector investors need to be sufficiently incentivised to supply capital by de-risking of agricultural markets through more predictable and consistent policies, secure property rights and institutional environment for agricultural investment.



2.6.7 Access to Land, Tenure Security, and Land Administration

The land reform and resettlement programme created a new and more equitable structure of land ownership, control and use in Zimbabwe. However, numerous challenges remain within the domain of land management and administration which, if unresolved, can destabilise and consequently render investment in the agricultural sector insecure and sub-optimal. Agriculture interfaces with other land use such as urban land use; forests; and wildlife. This, therefore, calls for a more strategic engagement and judicious management of agricultural activities in relation to urban expansion; natural resources and biodiversity management; and land tenure security.

2.6.7.1 Agriculture and land tenure security

Different types of farmers in Zimbabwe operate under different tenure systems, composed of customary tenure for communal farmers; freehold tenure/private for large-scale commercial farmers; 99-year leaseholds for the resettled A2 farmers; and permit tenure for the resettled A1 farmers. Despite the variations in tenure arrangements, the State retains the *Powers of Eminent Domain over all land* in Zimbabwe and holds allodial title to the land. The State can, therefore, promulgate such legislation to regulate all tenure systems, including freehold, as it deems fit. Accordingly, the State is currently empowered by the Land Acquisition Act (chapter 20:10) to compulsorily acquire land for public purposes, subject to fair and prompt compensation.

A key challenge facing the different land tenure systems (except the private one) is that they are perceived to be insecure. They do not confer all the land rights. As a result, both local and foreign investors are not confident to invest in the farms. The nexus of land administration and management, tenure security and agricultural development remains problematic. The security of land tenure is the function of the availability of justiciable bundle of land rights to occupy, use, transfer and exclude. These rights confer security to the owner if they are provided for and protected in law. As tradable freehold and/or leasehold interest, they also form the basis for use as collateral for financial institutions that seek to invest in agricultural development. To the extent that the current 99-year leases have these essential characteristics of secure land tenure; the greater proportion of medium and large scale commercial farming land may remain 'dead capital' - incapable of attracting both domestic and foreign capital investment to drive the growth of the agricultural sector.

A concerted effort by GoZ to convince financial institutions to accept the 99-leases as collateral have so far not achieved positive results. Hence, there is an urgent need to review the land tenure systems with the view of making them more secure in order to raise investor confidence and spur farm investment, which will ultimately lead to higher productivity and production.

2.6.7.2 Agriculture and biodiversity management

With respect to the interface of agriculture and natural resource and biodiversity conservation, there are 1,117 wetlands spread across the country covering about 793,000 Ha of land. These wetlands are natural ecosystems that serve as water filters, provide for flood and erosion control, furnish food and are home to a variety of both land and water-based wildlife. They are also a source of water and livelihood for people. However, they have declined significantly - about 21 percent of the wetlands in the country

remain in stable and pristine condition, another 20 percent are badly degraded, and the remainder is tittering on the verge of being irrecoverable (Ministry of Environment, Water and Climate, 2017). A policy framework is therefore required to formulate and scale up multi-stakeholder resource management strategies and plans that mobilise public, private, community, and development partner resources and inputs to empower communities through public awareness campaigns and training, access to skills, innovations, technologies, finance, and markets with a focus on enhancing rural livelihoods through equitable benefit-sharing; and the sustainable utilisation of such fragile and biodiverse habitats. A good example is the Nyambeya Wetland Project, a joint project of Government of Zimbabwe, UNDP, the Global Environmental Facility, Oxfam, Chimanimani Rural District Council and Nyambeya Community. This is a resemblance of what is possible when there is investment in support of a national resource management plan driven through climate and environment smart agriculture.

The contribution of smallholder farmers in the conservation and sustainable use of genetic resources needs to be recognised, mainstreamed and protected for the benefit of productivity and production. The framework endeavours to continue supporting conservation of genetic resources and its associated knowledge, as well as afford the smallholder farmers to participate in equitable sharing of benefits arising from the use of their genetic resources and the knowledge associated their plant genetic resources for food and agriculture.

2.6.7.3 Land administration systems

Another big challenge hampering access to land are weak land administration systems, which have contributed to the challenges of illegal settlements; deforestation; land degradation; farm boundary disputes; as well as conflicts between different land uses including mining, forestry, tourism, and urban expansion. Land management is difficult because the planning systems are managed by different ministries and authorities, making land use planning a convoluted exercise. Land use planning challenges include outdated land use plans and standards, unregulated and unclear procedures for land use conversion, and inaccurate farm level land use plans.

In the particular case of rural land and urban land, there are indications that about 45,000 Ha of rural agricultural land has been lost to urban development during the last 15 years of the land reform and resettlement programme (Ministry of Local Government, Public Works, and National Housing, 2018). This process continues unabated, and at the expense of the agricultural sector. This challenge calls for a national land master plan to clearly delineate rural land uses like agriculture, forestry, wildlife on one hand, and urban land on the other hand.

Land tenure in communal areas is highly informal and no formal land surveying and registration has been done. Land information is passed from generation to generation and thus remains highly localised. Consequently, administration information technology (IT) remains very basic with limited use of computers, Global Positioning System (GPS) technology, and cadastral mapping among others.

2.3.8 Resilient and Sustainable Agriculture

The process of enhancing agricultural productivity and production must be anchored in sustainable production systems based on agroecology. Business as usual, is not an option anymore. Soil fertility, biodiversity, and water saving practices will be key. Agroecology, being defined as a whole systems approach to agriculture and food systems development based on a wide variety of technologies, practices, and innovations, including local and traditional knowledge as well as modern science. By understanding and working with the interactions between plants, animals, humans and the environment within agricultural systems, agroecology encompasses multiple dimensions of the food system, including ecological, economic and social. Organic agriculture is the end of the spectrum of agroecology where standardisation is done for market access.

2.3.8.1 Building Resilience to Climate Change and the urgent need to restore soil health

The impact of global warming and climate change on productivity is a subject of great concern for agricultural production. Global and local projections suggest changes in rainfall, temperature and the length of growing seasons with an expected negative impact on agricultural productivity. Climate triggered yield reductions for Southern Africa have been estimated at between 11 and 30 percent by 2030. Climate projections up to 2070 for Zimbabwe show a 2.5 degrees Celsius increase in temperature. On the other hand, rainfall will decrease by 4.1 percent and 5.9 percent by 2030 and 2070 respectively. The effects of temperature changes on agricultural production will be more pronounced in the south-western parts of the country where temperatures will increase by 2.2 degrees Celsius; while those triggered by rainfall reductions will be highest in Mashonaland Central, Mashonaland East, Manicaland, and Masvingo provinces.

Climate change effects are already evident. Incidences of crop and livestock pests and diseases have increased, for example, the recent outbreaks of Fall Army Worm and *Tuta absoluta* outbreaks. This is expected to affect agricultural production directly and indirectly through the effect on the production of intermediate inputs. Further, climate change will affect water availability, and thus the need for the development of irrigation systems. About 62% of the El-Niño weather phenomena experienced in Zimbabwe since 1970 have led to below normal rainfall. The potential effect of these on rural livelihoods is clear. During the 2015/16 agricultural season, in the strongest El-Niño to date, agricultural production declined by 5 percent, leaving 2.8 million people food insecure. Some contributing factors towards limited adaptive capacity include; the low levels of investment in irrigation; weak early warning systems that disadvantage timely generation and dissemination of early warning information; limited funding towards research and development of drought-tolerant varieties; and lack of resources for effective extension service provision, disease control, and livestock development and limited adoption of Climate-Smart Agricultural (CSA) practices.

The diverse genetic resources in Zimbabwe provides the foundation for research and development to improve the crop varieties against the effects of climate change. Investment into plant breeding for tolerance to extreme climate events and emerging pests and diseases provide a potential solution to food and nutrition insecurity. Emphasis on small grains, legumes and pulses that are adapted to semi-arid conditions will be beneficial to the majority.

In addition, despite the sector being impacted upon by climate variability and change, it also contributes to the phenomenon. In Zimbabwe, it is established that agriculture is the third largest contributor to greenhouse gas emissions at 16.3 percent of the 63.8 megatonnes of greenhouse gases that contribute to global warming annually. Within agriculture, the livestock sector generates the highest amount of greenhouse gases. Weak capacity to enforce forest regulations undermines efforts to ensure the carbon sink function of forests is maintained, just as much as it contributes to prevention of soil erosion. Limited soil testing and likely over-use of inorganic fertilizer from blanket recommendations across the country contributes to global warming and soil degradation. There is an urgent need to restore soil health rather than simply applying more inorganic fertilizer to deliver short-term, unsustainable yield gains. An additional well-established fact is that agriculture is a key contributor to forest loss through agricultural land expansion, and within agriculture, with some industries such as tobacco using trees as timber for tobacco processing and curing.

CSA contributes towards sustainable intensification of agriculture production. Essentially, CSA, as defined by FAO, is a set of farming practices that sustainably increase agricultural productivity and incomes, build resilience and adaptation to climate change, reduce net greenhouse gas emissions from agriculture and enhance local food security.

However, despite the well-known benefits of these practices vis-à-vis climate change mitigation, adaptation and sustainable intensification, CSA has not been widely adopted in the country. For example, the adoption of conservation agriculture practices is estimated at only 100,000 smallholder farms on 125,000 Ha of cropland. More could be done if resources were available. But more important than resources are knowledge and mind set; adoption of appropriate CSA technologies, such as those based on agro-ecological principles, will require significant research and communication of evidence and shifts in longstanding practices imposed from the top down. They will also require markets for different kinds of agricultural inputs and outputs. Fertiliser placements are not precise and contribute to greenhouse gas emissions through over-use. The high incidence of wildfires, limited use of improved livestock management practices and high inorganic fertilizer dependence of farming systems also threaten the sustainability of agricultural production. Agricultural land expansion is occurring at the cost of environmental damage. Changing the status quo will require mainstreaming sustainable intensification in Zimbabwe's national agricultural policy for enhanced productivity, and the adoption of practices that allow for climate change adaptation and mitigation. Overall, this is expected to enhance the capacity of most households and communities to withstand climate-induced shocks.





3. GOAL, VISION, OBJECTIVES AND GUIDING PRINCIPLES

3.1 Goal

The overall goal of the NAPF is to create a stable enabling environment and flow of investment that sustainably enhances the capacity of the agricultural sector to anchor national economic growth to upper middle income status by 2030.

3.2 Vision

A prosperous, sustainable, resilient, diverse and competitive agriculture sector, ensuring food and nutrition security and significantly contributing to national development in the context of sustainable structural transformation.

3.3 Policy Objectives

1. Assure national and household food and nutrition security in a sustainable and resilient manner;
2. Ensure that the existing agricultural resource base is restored, maintained and improved to achieve sustainable agricultural intensification;
3. Generate income and decent employment to feasible optimum levels, with a special focus on women and youth;
4. Increase agriculture's contribution to the GDP through productivity improvements in crop, livestock, forests and fisheries sectors;
5. Contribute to sustainable industrial development through the provision of competitively home-grown agricultural raw materials;
6. Improve agricultural market access, exports, value addition and competitiveness and sustainable funding mechanisms;
7. Promote conservation and sustainable use of genetic resources important for food and agriculture; and
8. Improve multi-stakeholder cooperation and exchange among government arms, private sector, farmer-owned institutions, civil society organisations and development partners.

Policy statements

In view of the challenges of Zimbabwe's agricultural sector, achieving sustained growth commensurate with poverty reduction, food and nutrition security and employment creation requires:

1. Ensuring food and nutrition security for all through sustainable agricultural intensification, dietary diversification, improved access to land, finance and markets, and other resilience building measures;
2. Increasing investments in agricultural research and development, technology and extension and adoption of climate- and business-smart technology and innovation;
3. Increasing the safe, sustainable and precise utilisation of productivity-enhancing agricultural inputs;
4. Investing more resources in the development of infrastructure to support agricultural production and marketing;
5. Improving the flows of agricultural finance;

- Promoting equitable and secure land tenure and rights; and
- Improving farmer resilience, increase productivity through mitigation and adaptation to climate shocks and sustainability of agriculture and agri-food systems.

3.4 Guiding Principles

The NAPF is built on nine (9) key principles as summarised in Figure 13.

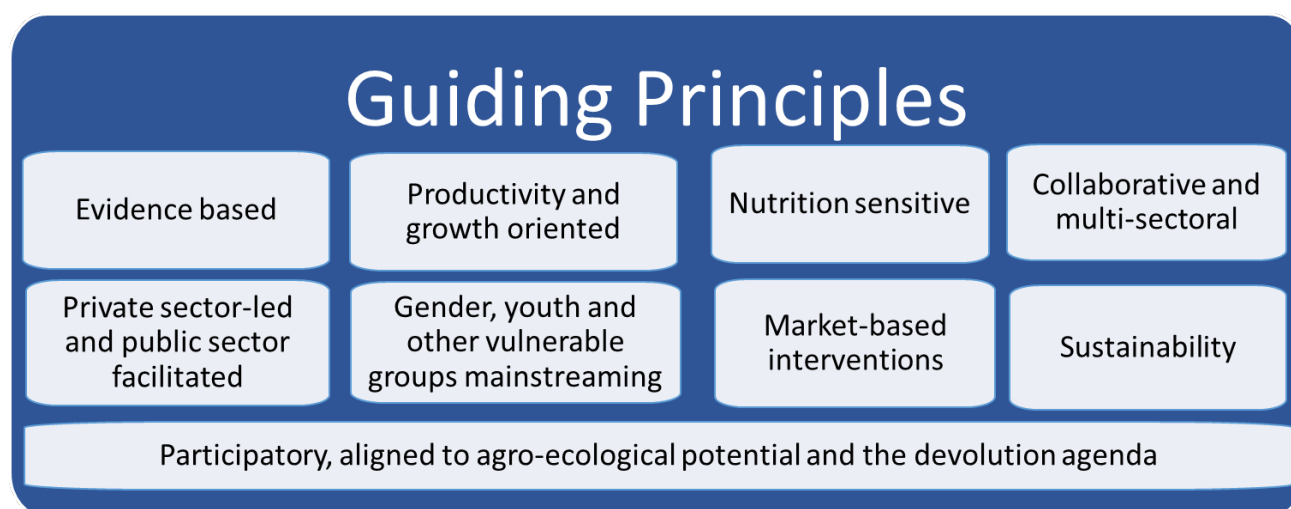


Figure 14: NAPF Guiding Principles

3.4.1 Evidence-based decisions making

To the extent possible, decision making processes in the sector will be guided and based on solid and credible evidence generated within the sector and from national, regional and global experiences.

3.4.2 Productivity and growth oriented

In order to sustainably transition the nation out of poverty and food and nutrition insecurity, Zimbabwe's agricultural sector will aim to sustainably raise its agricultural productivity and production. All subsector strategies will have a focus on improving stakeholder confidence in the regulatory framework critical to attracting private investments into agriculture and reorientation of public resources into key productivity growth drivers.

3.4.3 Nutrition sensitive agriculture

Zimbabwe embraces the food-based approach to agricultural development that puts nutritionally rich foods, dietary diversity, food fortification, and biofortification at the heart of overcoming malnutrition and micronutrient deficiencies, and aims to make the national food system better equipped to produce good nutritional outcomes.

3.4.4 Market-based interventions

Increased agricultural production and productivity growth will be attained through the promotion of competitive, efficient and transparent market and private-sector-driven approaches including risk management. The government promotes a rule-based system of interventions that will not undermine private sector investments but encourage them.

3.4.5 Private sector-led and public sector facilitated

The NAPF and associated strategies will promote and support private sector-led agricultural growth and development with the government providing the necessary regulations and enabling environment. Included as part of the private sector are farmer organisations.

3.4.6 Collaborative and multi-sectoral

The implementation, monitoring, and evaluation of the NAPF and subsector strategies will be guided by collaborative approaches and institutional models that embraces partnerships at all levels and use of multi-stakeholder agricultural knowledge, technology and innovation platforms at national, provincial and district levels.

3.4.7 Participatory and responsive to agro-ecological potential

The nature, scope, and magnitude of investments required to grow the agricultural sector will be planned and implemented in the context of the NAPF and will be inclusive and partnership-driven through a set of spatially determined interventions that reflect the comparative advantages of different agro-ecological zones in the country. A reclassification of agro-ecological zones in view of climate change will ensure adequate planning and sustainable implementation of interventions.

3.4.8 Sustainability

The process of enhancing agricultural productivity and production will balance the exploitation of agricultural land and its environs to grow the economy and sustain livelihoods. Because of the relationship between agricultural production and global warming, this growth must be attained through technologies that minimize green-house gas emissions and those that promote uptake of carbon from the atmosphere (e.g. agroforestry, and blended fertilisers). The NAPF and subsector strategies will promote the conservation and development of local genetic resources and promote their sustainable utilisation. NAPF will ensure that agri-food systems are sustainable and that employment within agriculture will be in line with good agricultural practices and principle of social sustainability. This includes adhering to international commitments on child labour and ensuring the minimum standards of value chain workers are met.

3.4.9 Gender, youth, and other vulnerable groups mainstreaming

The NAPF and all sub-sector strategies will mainstream gender, youth, disability, ethnic minorities and other vulnerable groups. Thus, all sub-sector strategies and policies developed under the NAPF will assess the implications for youth, women, and men of any planned investments and interventions. Youth employment in agriculture will also receive due focus and attention.

4. POLICY OBJECTIVES AND STRATEGIC INITIATIVES

4.1 Pillar I: Food and Nutrition Security and Resilience

Policy statement: Ensure food and nutrition security for all through sustainable agricultural intensification, dietary diversification, improved access to land, finance and markets, and other resilience building measures.

4.1.1 Strategic Objectives (SO)

- SO 4.1.1:** Facilitate the implementation of policies that recognise and promote alternative agriculture practices enhancing crop diversity and availability of nutritious food moving away from maize centric interventions and maximise on low entry barriers for resource-poor farmers.
- SO 4.1.2:** Support the development and enforcement of micronutrient intervention related policies.
- SO 4.1.3:** Support food safety through adequately enforced regulation of food production, processing, storage and distribution.
- SO 4.1.4:** Raise productivity to optimal levels through climate-resilient sustainable intensification, based on restoring soil health and making optimum use of water and other natural resources that improves local genetic resources (such as small grains, pulses and legumes).

4.1.2 Strategic Initiatives

Table 4.1: Strategic initiatives to improve food and nutrition security and resilience

Policy/Regulatory

- Policies and incentives under government and development partners input and output support programmes for crops and livestock to be market-friendly, adapted to the needs of smallholders and commercial farmers in their different agro-ecological zones, and deliver public goods and ecosystem services such as production of diverse, nutritious and safe food and sustainable natural resource management;
- Promote access to finance and livelihood diversification;
- Promote production practices that enhance diversified crops for diversified diets and improved nutrition (agroecology/ organic, regenerative agriculture) and reduce barriers of entry for smallholder farmers;
- Promote a coordinated framework on food safety together with MoHCC and MoICED;
- Develop strategies that support youth employment in agriculture.

Strengthening Institutions and Organisations

- Strengthen government capacity to embrace evidence-based decisions, informed by broad stakeholder consultation and to coordinate and regulate actions of stakeholders involved in food security and nutrition interventions;
- Capacitate agricultural extension services to be relevant to farmers' needs especially for: improved promotion of agroecology and organic agriculture; climate-smart agro-ecological practices; diversification; and production of nutritious and safe produce;
- Strengthen grassroots nutrition education programmes;

- Ensure gender mainstreaming to ensure support to the roles of men and women in food and nutrition provision at household and community levels;
- Strengthen government capacity to coordinate actions of stakeholders involved in youth employment in agriculture initiatives.

Investments and Operations

- Facilitate private investment for improved productivity, food safety, preservation and processing capacity of farmers, and other value chain actors;
- Enhance the capacity of farmers to engage financial institutions (by improving farmer financial literacy; and make smallholder farmers bankable through the resolution of land disputes and ensuring land tenure security);
- Invest in research, development, deployment and diffusion (RDD&D) of low-cost technologies and improved post-harvest management for smallholder farmers (supply and services);
- Promote access to biofortified seed or vines for the production of nutrient dense varieties;
- Set up integrated food and nutrition security information system and support information generation, management and sharing across government and stakeholders;
- Put in place investments and incentives for promoting youth employment in agriculture;
- Intensify behaviour change communication on healthy diets, hygiene and food preparation among the population.



4.2 Pillar II: Agricultural Knowledge, Technology and Innovation System

Policy statement: Increase investment in agricultural research and development, technology and extension systems and adoption of climate- and business-smart technology and innovation.

4.2.1 Strategic Objectives

- SO 4.2.1:** To develop and promote an efficient and inclusive agricultural knowledge, technology, innovation and communication (exchange and dissemination) system.
- SO 4.2.2:** To increase public and private investment in agricultural research and development, technology and extension.
- SO 4.2.3:** To improve delivery and coordination of public and private extension services adapted to farmers' current needs.
- SO 4.2.4:** To improve agricultural colleges/universities and curricula adapted to needs (e.g. climate-resilient sustainable intensification, early warning systems, managing pests and diseases, nutrition) as well as practical training for extension staff on farms.
- SO 4.2.5:** To continue development and deployment of information systems and mobile phone platforms for improved research and extension.
- SO 4.2.6:** To set research priorities in consultation with farmers and unions, MLAWCRR and private sector service providers and value chain actors.

4.2.3 Strategic Initiatives

Table 4.2: Strategic Initiatives to develop and promote an efficient AKTIS

Policy/Regulatory
<ul style="list-style-type: none">• Realign budgetary allocation to prioritise funding to capital and recurrent expenditure in agricultural research, education and extension activities;• Promote cost-recovery measures in research, education and extension provision;• Facilitate Public and Private Partnerships to facilitate funding opportunities• Facilitate pluralist extension and research;• Strengthen research-extension-farmer- private sector linkages;• Ensure research funding has flexibility to include emerging issues (e.g. Fall Army Worm).
Strengthening Institutions and Organisation
<ul style="list-style-type: none">• Institutionalise retention policy that facilitates funded in-service training and skills enhancing;• Facilitate knowledge platform with extension to:<ul style="list-style-type: none">✓ Integrate indigenous/local knowledge innovations and systems.✓ Design appropriate dissemination and feedback materials.• Set up research priorities with the involvement of farmer-owned institutions, agricultural extension service providers and private sector value chain actors;• Review agricultural curricula and training on a regular basis in response to industry needs.
Investments and Operations
<ul style="list-style-type: none">• Modernisation of research facilities, agricultural equipment, and ICT equipment;• Resource government research, extension, and farmer outreach programmes;• Rehabilitate, upgrading and construct new research and training infrastructure;• Invest in modern teaching and training technologies that address challenges and gaps in agricultural knowledge.

4.3 Pillar III: Production and Supply of Agricultural Inputs

Policy statement: Increase the safe, sustainable and precise utilisation of productivity-enhancing agricultural inputs.

4.3.1 Strategic Objectives

- SO 4.3.1:** To promote policy actions that lower the costs of appropriate, safe agricultural inputs which crowd in private sector;
- SO 4.3.2:** To improve access to finance for farmers to enhance their capacity to access adequate inputs on time and customising financing models to the specific needs of smallholder and commercial farmers;
- SO 4.3.3:** To increase timely supply of adequate and diverse inputs through the development of an efficient, diverse, competitive, private-sector-led production, distribution, and marketing system;
- SO 4.3.4:** Support the exploitation of natural resources for use as agriculture inputs in organic agriculture;
- SO 4.3.5** To support the development of local indigenous farmer seed systems;
- SO 4.3.6:** Reduce dependence on agro-chemicals while sustainably enhancing overall productivity and nutritional value of food through promotion of agro-ecological practices.

4.3.3 Strategic Initiatives

Table 4.3: Strategic initiatives to increase the safe, sustainable and precise utilisation of productivity-enhancing agricultural inputs

Policy/Regulatory

- Promote competitiveness in the input sector;
- Policies and incentives under government and development partners input and output support programmes for crops and livestock to be market-friendly, adapted to the needs of smallholders and commercial farmers in their different agro-ecological zones, and deliver public goods and ecosystem services such as production of diverse, nutritious and safe food and sustainable natural resource management;
- Provide incentives to the private sector to invest in input production and supply systems of the most valued inputs;
- Promote research and production of more effective agricultural inputs, including biofertilisers and bio-inoculants, and agro-ecological technologies that reduce the need for agro-chemicals, suited to specific agro-ecologies;
- Strengthen the private distribution channels of critical inputs (fertiliser, seed and agro-chemicals and livestock vaccines and drugs);
- Nurture private sector provision of affordable seasonal input credit;
- Promote and support participatory plant breeding by smallholder farmers and farmer organisations;
- Promote production and distribution of organic soil fertility options for smallholder farmers.

Strengthening Institutions and Organisation

- Strengthen quality control monitoring systems;
- Build capacity of government, private sector and farmer organisations in appropriate inputs for each agro-ecological zone and farm size;
- Strengthen seed selection, seed preservation and storage of farmers indigenous seeds.

Investments and Operations

- Provide concessional funding to private sector to re-energize the agricultural input manufacturing industry;
 - Promote financing by private financial institutions of input distributors including agro-dealers, chain leaders and local traders to enhance the development of input distribution networks;
 - Provide support for soil health and water quality mapping and develop capacity of farmers in appropriate soil health management options;
 - Establish market information systems to monitor input supply and demand, prices and services.
 - Provide financing for crop breeding and development of Early Generation Seeds (EGS) of strategic crops.
-



4.4 Pillar IV: Development of Agricultural Infrastructure

Policy statement: Invest more resources in the development of infrastructure to support agricultural production, value addition, marketing and trade.

4.4.2 Strategic Objectives

SO 4.4.1: To develop, rehabilitate and modernize agricultural infrastructure.

SO 4.4.2: To increase access to appropriate low-cost agricultural technologies.

SO 4.4.3: Reduce energy costs and increase production and use of renewable energy across the agricultural value chain.

SO 4.4.4: To promote climate-smart agricultural infrastructure development.

4.4.3 Strategic Initiatives

Table 4.4: Strategic Initiatives for investing more resources in the development of infrastructure to support agricultural production and marketing

Policy/Regulatory
<ul style="list-style-type: none">• Facilitate the establishment of an Agriculture Infrastructure Fund;• Prioritise and support agriculture value chain development based on regional comparative advantages;• Promote public-private partnerships to invest in innovations for after sales service, repair and maintenance;• Promote appropriate technology transfer partnerships;• Incentivise private sector to invest in infrastructure development;• Provide reduced energy tariffs for agricultural production and incentives for on-farm generation of renewable energy and its exportation off-farm.
Strengthening Institutions and Organisation
<ul style="list-style-type: none">• Capacitate and enhance skills for extension workers and irrigation mechanisation technicians and farmers in repair and maintenance;• Institutionalise in-service ICT literacy programmes in all agricultural institutes;• Provide capacity building support through knowledge exchange on new agricultural technologies for farmers and extension workers;• Capacitate extension workers and farmers to take part in the development of appropriate demand-driven technologies and ICT technology platforms;• Promote the use of infrastructure development models that utilise indigenous knowledge.
Investments and Operations
<ul style="list-style-type: none">• Resuscitation of agricultural related infrastructure and services along spatial corridors and priority value chains;• Reclassification of agro-ecological zones in view of climate change to support Agricultural Value Chain Development;

- Facilitate People-Public-Private Partnership (PPPP) investment in the development of agricultural infrastructure, ensuring value-for-money for the public purse;
 - Invest in rehabilitation, construction, and maintenance of feeder roads, agricultural training institutions and other related agriculture infrastructure;
 - Invest in alternative energy infrastructure such as solar energy, and biogas digesters for livestock and crop residues;
 - Invest in processing infrastructure for climate-smart agricultural commodities.
-

4.5 Pillar V: Agricultural Marketing and Trade Development

Policy statement: Develop effective and efficient domestic, regional and international agricultural markets.

4.5.1 Strategic Objectives

- SO 5.5.1:** To enhance organisation of agricultural producers through producer associations and innovative, inclusive and equitable productive alliances, and to support small producer associations to grow, federate and/or evolve into SMEs.
- SO 5.5.2:** Improve access to lucrative market segments in agricultural value chains by smallholder farmers, including through application of ICT.
- SO 5.5.3:** To support development and revitalisation of infrastructure including agro-processing and marketing hubs in suitable small and emerging urban centres.
- SO 5.5.5:** Facilitate reduction in the cost of doing business.
- SO 5.5.6:** Increase agricultural exports.
- SO 5.5.7:** To position the country to access the growing organic niche market.
- SO 5.5.8:** Facilitate contract farming for farmers with sufficient capacity and for value chains and farming practices suited to agro-ecological zones.
- SO 5.5.9:** Capacity development of smallholder farmers in marketing and business skills.

4.5.3 Strategic Initiatives

Table 4.5: Strategic Initiative for developing effective and efficient domestic, regional and international agricultural markets

Policy/Regulatory

- Promote the development of selected agriculture value chains' growth plans mapped on spatial corridors along major highways or water bodies;
 - Review and streamline the level and collection of levies;
 - Streamline and decentralize the permit system and other accompanying documents;
 - Provide incentives to the private sector to invest in agro-processing and value addition industries;
 - Promote the development of smallholder aggregation models;
 - Facilitate the establishment and harmonisation of private and public grades and standards for agricultural commodities;
 - Facilitate access to up-to-date market information to all market players;
-

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- Promote the establishment of commodity exchanges to help with price discovery and operationalisation of Warehouse Receipts Systems;
- Rationalise the operations and maintenance of the SGR to be market friendly
- Facilitate the establishment of export promotion councils;
- Promote an integrated approach to crop and livestock biosecurity to minimise risks.

Strengthening Institutions and Organisation

- Build capacity of government departments, farmer organisations, and other market players in data collection, analysis, storage and dissemination or exchange.
- Capacitate and enhance skills of the responsible regulatory bodies and local government authorities.
- Capacitate and enhance skills of market players in regional and international standards.

Investments and Operations

- Establish a consolidated market information system to provide market players with up-to-date trade and price information
- Build and refurbish market infrastructure for different commodities i.e. processing and marketing hubs in small towns and emerging urban areas, markets stalls, dry and cold chain storage countrywide
- Invest in ICT based one-stop shop for permits and levies
- Rehabilitate public grain storage facilities
- Invest in export-related infrastructure
- Provide concessional funding to the private sector to re-energize the agro-processing industry for export



4.6 Pillar VI: Agricultural Finance and Credit

Policy Statement: To improve access, availability and appropriateness of agricultural financing

4.6.1 Strategic Objectives

SO 4.6.1: To facilitate the mobilisation of affordable and long term lines of credit.

SO 4.6.2: To facilitate access to affordable credit and funding for the sector in line with sustainable agricultural intensification appropriate to agro-ecological zone.

SO 4.6.4: To avail farmers of incentives for sustainable agriculture and natural resource management, making use of payments for ecosystem services and climate finance

SO 4.6.6: To facilitate creation of a guarantee fund

4.6.3 Strategic Initiatives

Table 4.6: Strategic Initiative for increasing financing to agriculture

Policy/Regulatory

- Facilitate mobilisation of affordable and long term lines of credit from both domestic and international markets;
- Promote private sector participation in funding agriculture including joint agribusiness ventures with local and international partners;
- Realign provisions in the 99 year land leases to make them bankable;
- Facilitate the operationalisation of the Warehouse Receipt System;
- Strengthen the contract farming framework;
- Review the taxation of the agricultural sector and consider tax relief to incentivise good agricultural practices, including sustainable intensification;
- Design and implement a system of payments for ecosystem services for the agriculture sector.

Strengthening Institutions and Organisation

- Capacity strengthening to improve the relevance of loan product designs and financial packages to the agricultural sector;
- Capacitating and enhancing skills for public and private sector players to sustainably enhance agricultural value chain performance.

Investments and Operations

- Establish an Agricultural Development Fund;
- Establish a farmer register to facilitate farmer risk profiling;
- Capitalisation of the farmers through innovations that increase finance flows to the agricultural sector (guarantees, revolving funds or wholesale facilities for lenders);
- Establish a crop and livestock contingency fund for disaster risk reduction.



4.7 Pillar VII: Access, Tenure Security and Land Administration

Policy statement: Promote equitable and secure land tenure and rights.

4.7.2 Strategic Objectives

SO 4.7.1: To strengthen the land tenure system to confer security of all land rights.

SO 4.7.2: To develop an effective, equitable and efficient land administration system.

SO 4.7.3: To develop a new land policy to achieve the above objectives.

4.7.3 Strategic Initiatives

Table 4.7: Strategic Initiative for promoting equitable and secure land ownership and rights

Policy/Regulatory
<ul style="list-style-type: none">• Develop a new land policy that harmonises existing laws (statutory and customary), policies and institutional mandates.• Secure land rights and access to land for all, including women.• Develop adequate legislative and regulatory framework for dispute resolution, compensation, and sharing of infrastructure.• Strengthen coordination within the MLAWCRR and across other sectors.• Enforce land use planning regulations.• Enforce rules and regulations on orderly resettlements.• Ensure maximum farm sizes are adhered to.• Design an equitable and sustainable financing mechanism for the land administration system, including review of land taxation and payment by A2 farmers for inherited private land improvements.
Strengthening Institutions and Organisation
<ul style="list-style-type: none">• Build confidence in the transferability and bankability of the 99-year lease and other tenure systems.• Review other land tenure systems with a view to enhancing the commercial value of the land.• Strengthen service delivery capacity and land information systems .• Establish and resource land administration systems.• Establish a land steering committee comprising relevant government, multilateral, donor, private sector, civil society and research stakeholders to oversee the development and implementation of land policy.
Investments and Operations
<ul style="list-style-type: none">• Expedite land survey, registration valuations, and audits.• Set up a compensation mechanism with a clear and sustainably financed plan for paying compensation over a determined period.• Pilot an integrated, modernised land governance system at district level, including participatory mapping, alternative dispute settlement mechanisms and a digitized land information management system, before learning lessons and rolling out nationally

4.8 Pillar VIII: Resilient Sustainable Agriculture

Policy statement: Improve farmer resilience, increase productivity through mitigation and adaptation to climate shocks and sustainability of agriculture and food systems.

4.8.2 Strategic Objectives

- SO 4.8.1:** To enhance the resilience of agriculture production systems to climate change, pest and disease attacks.
- SO 4.8.2:** To mainstream climate change impacts in all programmes and subsectors and mobilise funds for climate change adaptation and mitigation programmes.
- SO 4.8.3:** To enhance local capacity to generate, disseminate and understand climate information and best practices.
- SO 4.8.4:** To mainstream resource use efficiency and sustainable natural resource management in agricultural production systems through capacity building of extension services and farmers and payment for ecosystem services.
- SO 4.8.5:** To promote widespread uptake of sustainable agricultural intensification approaches and technologies, and practices such as agroecology.

4.8.3 Strategic Initiatives

Table 4.8: Strategic Initiative to improve farmer resilience to climate shocks

Policy/Regulatory
<ul style="list-style-type: none">• Promote the adoption of climate-smart agricultural practices, especially agro-ecological practices suited to each agro-ecological zone;• Promote context-specific water harvesting practices;• Promote access to low-cost finance for irrigation development and other investments;• Increase finance flows towards early warning, rapid response systems, extension and research and development;• Promote best-practice approaches and establish minimum standards for climate and disaster risk finance for farmers, as part of a risk-layering approach to agricultural risk finance;• Promote sustainable agricultural intensification, including through capacity building and financial incentives.
Strengthening Institutions and Organisation
<ul style="list-style-type: none">• Improve cross-sectoral coordination on sustainable natural resource management and conservation;• Enhance the capacity of government staff, private sector players and NGOs to access climate finance;• Strengthening of context specific advisory for crop and livestock production based on interpretations of seasonal forecasts at the local level;• Enhance capacity of Meteorological Services to provide accurate seasonal forecasts, long-term climate trends and early warnings of extreme weather events;

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- Enhance capacity of AGRITEX to translate meteorological and climate information into advice for farmers and communicate this advice promptly and clearly, making use of ICT platforms; and enhance capacity of farmers to use rain gauges, bio-indicators, ICT platforms, and other low-cost technologies to enhance their access to climate information;
- Build the capacity of government officials and extension workers in the most appropriate resilient, sustainable agriculture technologies, including water harvesting and conservation, drought tolerant varieties and breeds, soil conservation, biofertilisers and bio-inoculants, agro-sylvopastoral systems, and other agro-ecological practices;
- Build capacity of extension workers and farmers to assess soil health and restore and enhance it with minimum use of agrochemicals.

Investments and Operations

- Invest in irrigation development and water harvesting technologies;
- Facilitate access to soil health assessments and neutral advice to farmers on how to restore and enhance their soil health with minimum use of agrochemicals;
- Invest in mechanisation for conservation farming;
- Invest in research and development, including for most locally appropriate water harvesting and sustainable agricultural intensification practices, including those based on agro-ecological principles;
- Invest in new early warning infrastructure, and upgrade existing ones.



4.9 Pillar IX: Institutional Arrangements for Policy Implementation

Policy statement: To facilitate a participatory and inclusive policy implementation engagement of all the relevant actors in the agricultural sector, hence ensuring a shared ownership of the process and outcomes.

4.9.2 Strategic Objectives

SO 4.9.1: To have an effective and robust coordination mechanism to ensure enhanced synergies across other sectors.

SO 4.9.2: To facilitate the active participation of political leadership, senior government officers, the private sector, development partners, the civil society and local communities with regular feedback between implementing agencies as a way of promoting learning and knowledge sharing.

SO 4.9.3: To enable the translation of the NAPF into result oriented implementation plan.

4.9.3 Strategic Initiatives

Table 4.9: Institutional Arrangements for Policy Implementation

Policy/Regulatory
<ul style="list-style-type: none"> • Delineate the mandate and structure of the Ministry to strengthen its policy development and management systems; • Realignment of current and future investment plans and operations with those of other institutions in the context of deepening agricultural value chains through, inclusive, partnership-based, decentralised and spatially determined investment programmes at provincial and district levels.
Strengthening Institutions and Organisation
<ul style="list-style-type: none"> • Ensuring adequate technical capacity and clear roles for the public service officers responsible for implementation, monitoring and evaluation of the expected NAPF outcomes; • Roll out of subsector specific actions aligned to this framework, and the facilitation of effective partnerships; • Establish a robust coordination mechanism guided by the national structures and pillars for implementation of the Vision 2030 and integration with the national and subnational food and nutrition security structures.
Investments and Operations
<ul style="list-style-type: none"> • Capacity development of public sector arms to enhance service delivery • Promotion and support of investments that optimise agricultural productivity and production; • Development of a robust monitoring, evaluation and learning system and subsequent reviews of the NAPF.

5.0 OPERATIONALISING THE POLICY FRAMEWORK

This chapter outlines an approach that will give agency to the proposed policy framework. The policy framework will be operationalized by first ensuring adequate technical capacity and clear roles for the public service officers responsible for implementation and roll out of subsector specific actions aligned to this framework, monitoring and evaluation of the expected outcomes and the facilitation of effective partnerships with other line ministries and departments, parastatals, private sector, civil society, farmers, academia and development partners. Secondly, the framework will be translated into a result oriented implementation plan in the form of a revised Zimbabwe Agricultural Investment Plan (ZAIP). This will enable facilitation of public private partnerships and utilizing the continental frameworks of CAADP and RECs to mobilize resources. In addition the operationalisation of the framework will be driven through a robust coordination mechanism guided by the national structures and pillars for implementation of the Vision 2030, integration with the national and subnational food security structures and strengthening of the ZAIIP coordination framework.

5.1 Rethinking Institutional Arrangements

The structure to manage and enable the agricultural sector to attract investment and achieve its national development goals would require some reorganisation of the Ministry's key departments as well as parastatals (Box 1). In view of the multi-dimensional nature of the agricultural sector, it is important to have an effective coordination mechanism to ensure enhanced synergies across other sectors, which will be required to be put in place.

This policy framework will help to delineate the mandate and structure of the Ministry to strengthen its policy development and management systems; capacity development; and promotion and support of investments that optimise agricultural productivity and production. This will require the realignment of current and future investment plans and operations with those of other institutions in the context of deepening agricultural value chains through, inclusive, partnership-based, decentralised and spatially determined investment programmes at provincial and district levels. The reorganisation may entail the merging of some parastatals into a single authority with responsibilities for promoting and facilitating more diverse and sustainable investment in the sector.



Box 1: Institutional Arrangements

- MLAWCRR departments and knowledge, technology and innovation institutions;
- Parastatals under MLAWCRR - Agribank, ARC, ARDA, CSC, GMB, PIB, TIMB, TRB, AMA, National Land Commission, ZINWA, Climate Change Unit;
- Enabling ministries and their parastatals and enterprises:- Ministry of Finance, Ministry of Local Government, Public Works and National Housing, Ministry of Public Service, Labour and Social Welfare, Ministry of Industry and Commerce, Ministry of Higher and Tertiary Education, Ministry of Energy and Power Development, Ministry of Transport and Infrastructural Development, Ministry of Environment Tourism and Hospitality Industry, Ministry of Youth, Sport, Arts and Recreation, Ministry of Health and Child Care, Ministry of Women Affairs, Community Small and Medium Enterprise Development Value chain actor organisations - producers, processors, transporters, marketers, financiers;
- Standards, quality, accreditation and measurement (SQAM) institutions: SAZ, SIRDC, MCAZ, BIZ, NSSA, IPEC;
- Regulatory institutions and agricultural policies and legislations (rules and procedures.

5.2 Promotion and Facilitation of Investment in Agriculture

Given the focus on promoting and sustaining the flows of investment into the interventions areas outlined in Chapter 4, it is imperative that the requisite environment is created to attract these investments.

The NAPF has motivated fundamental principles and elements required to stimulate investments. There is a need to operationalise this framework by providing a compendium of investment opportunities and plans across all agro-ecological zones of the country. The key elements to promote and facilitate the flow of investment into agriculture in the compendium must include, at minimum:-

- a. Development of an agricultural investment strategy. This calls for the completion of key subsector investments strategies which are aligned to the NAPF;
- b. Investment promotion and facilitation;
- c. Agriculture value chain infrastructure development;
- d. Developing or strengthening trade policy;
- e. Agricultural financial sector development;
- f. Human resources development, research, and innovation;
- g. Rethinking tax policy in relation to agricultural development;
- h. Risk management - crop, livestock, and drought insurance, and disaster risk reduction and management;
- i. Responsible business conduct - labour standards, environmental regulations, corruption, equitable benefit sharing, etc.;
- j. Sustainable use of natural resources and environmental management - use of clean energy, smart agriculture, use of green technologies, etc.

5.3 Special Agricultural Zone

At a global and continental level, there is growing consensus that national policy frameworks that seek to enhance the flow of investments into agriculture must build on existing information and experiences

about growth clusters/zones and/or corridors that anchor agricultural development in general, herein after referred to as 'special agricultural zones'. The notion of a development hub/cluster/corridor is a conceptual, programmatic framework to develop a territory on the basis of its natural and/or created comparative advantage(s). The special agricultural zones will represent different forms of agricultural comparative advantage across the national space and economy that have the potential to attract public, private, community and development partner investments from both domestic and international markets to fund interventions that promote integrated agricultural development.

The model suggests that the coordination of the zone-based investments by governments, the private sector, communities and development partners can trigger the transformational change required to unleash agriculture-driven national development. Such coordination will be based on: AKTIS, water, irrigation, transport, power, communications, agro-processing capacity and enhancing competitiveness to access both domestic and international markets. This investment-driven and integrated agriculture-based national development model is transformational in the sense that it targets public, domestic and private investment, policies and support programmes for smallholder farmers - particularly rural women and youths. The main objective is to stimulate the closing of the yield gaps; generate sustainable and inclusive increases in crop and livestock outputs; and support sustainable agro-processing and marketing. Achievement of these objectives can collectively enhance the agricultural sector's contribution to national economic development and the realisation of the national vision for Zimbabwe to become a middle income country by 2030.

There are strategic advantages for using this NAPF to position the country to attract and align public, private, community and development partner investments in agriculture development through special agricultural zones.

First, agricultural development of these zones are increasingly cited as a developmental approach that attracts significant investments at the continental, regional and national levels in Africa. However, lessons must be learnt from some of the failures that have been recorded to date (see Picard et al., 2017). For Zimbabwe, there is need to develop these zones taking into account the post-land-reform dynamics between and among different groups of farmers (commercial, A1, A2, communal) and other population groups. In particular, it should take into account, and seek to take advantage of emerging growth points and small urban centres, whose role as new and more conveniently located processing hubs and markets for agricultural produce could be accelerated through provision of basic infrastructure and services.

Second, Zimbabwe has a rich and yet unexploited history and experience of planning and implementing territorially-based intra-national regional development efforts on the basis of agricultural clusters. These include the development of the South East Lowveld on the back of a sugarcane value chain that bequeathed Mukwasine, Chiredzi, Triangle and Hippo Valley using a combination of rich soils, abundant river damming opportunities, water, irrigation, transport, and market intelligence and marketing infrastructure.

Third, there are many areas in the country that bear significant comparative advantages as special agricultural zones that can be immediately exploited as part of the drive towards the realisation of Vision 2030 through agriculture-driven development. These include, but are not limited to, the Tokwe-Mukorsi Dam Project; the Odzi-Osborne River System; the Zambezi Gwayi-Shangani Corridor; the Manyuchi Dam

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Horticultural Hub; and the Kunzvi River-Dam Hub. Indeed, suggestions have been canvassed to conceptualise the Plumtree-Harare-Forbes Border Post and the Beitbridge-Harare-Chirundu road and rail tracks, as agriculture-based spatial development corridors that can give life to high potential regional agricultural value chains spanning grains and staples, livestock, cash crops, horticulture and spices, and edible oils. In addition, the high- density urban centres - Harare, Bulawayo, Mutare, Gweru, Masvingo, Marondera and Kwekwe-Redcliffe - can also be developed into agricultural hubs/clusters that focus on the development of integrated production, collection, processing and marketing infrastructure; similar to the Johannesburg Fresh Produce Market and that can target both domestic and foreign markets for horticultural products and spices.

Lastly, the call to promote and support the flow of investments into agriculture is predicated on a legitimate calculus that is designed to underwrite the national interest in the domains of food and nutrition security, the industrialisation and growth of the economy, and deepening and expanding the domestic market. In addition, it would be strategic to invest in more dam construction and turning the 10,000 water bodies across the country into irrigation propositions that form the basis for more special agricultural zones to promote investments in fertilizer, chemicals, and agricultural equipment manufacturing; and support companies that can produce goods and services for the global markets as is happening in other African countries such as Egypt and Ethiopia.



6.0 Implementation Framework

6.1 Coordination Mechanisms Guided by the National Structures

The development of agriculture has been premised on a participatory and inclusive engagement of all the relevant actors in the agricultural sector, hence ensuring a shared ownership of the process and outcomes.

The involvement of all key stakeholders in the agricultural sector is important for the successful implementation of the programmes. In this regard, effective participation of all key stakeholders during the implementation of the NAPF (2019-2030) is crucial, providing a platform for effective policy dialogue, review and shared responsibility, stronger and broadened partnerships, and strategic alliances with regional integration and international initiatives.

6.1.1 Formation of Pillar/Thematic Working Groups

Nine pillar/thematic working groups will be formed to assist with the operationalisation of the NAPF. The working groups will be composed of various stakeholders drawn from government, private sector, farmer groups, and civil society, academia and development partners. Annex 1, presents an indicative list of stakeholders by pillar as well as their associated terms of reference. Once constituted, the working groups will within the first 90 days perform the following activities:

1. Appoint a steering committee or sub-committee to champion the operationalisation of pillar activities.
2. Carry out a rapid stocktaking and develop an inventory on what needs to be done by who, resources required and timing.
3. Develop an implementation strategy.
4. Develop M&E framework and knowledge management system.

Institutions and programmes wishing to support the operationalisation of the NAPF will be requested to provide both technical and financial assistance for analytical assessments that will enhance and fast-track the development of the agricultural sector in the country.

6.2.1 Proposed Policy Coordination Structure

a) Agriculture Sector Inter-Ministerial Committee (ASIMC)

The agricultural sector has responsibilities spread across various ministries. The key ministries involved in agriculture which will form the Agriculture Sector Inter-Ministerial Committee (ASIMC) are the Ministries of Lands, Agriculture, Water, Climate and Rural Resettlement; Environment Tourism and Hospitality Industry; Public Service Labour and Social Welfare; Finance and Economic Development; Women Affairs, Community Small and Medium Enterprise Development; Industry and Commerce, representatives from development partners, non-governmental organisations, private sector and farmer unions. MLAWCRR will chair the committee.

The ASIMC shall be a forum for:

- Reviewing progress in the implementation of Government policy.
- Sector policy deliberations and direction, coordinating and harmonizing programme implementation to ensure alignment to national policies and strategic programmes, such as the Vision 2030.
- Ensure that investment programmes are in line with sector policies.
- Review mechanisms that foster enhanced stakeholder participation in the implementation process.
- Provide a forum for the sector-wide approach to planning and budgeting for the agriculture sector.
- Mobilisation of funds and other resources for delivery of sector programmes

b) Agricultural Sector Steering Committee

At a technical level there will be need to set up an Agricultural Sector Steering Committee (ASSC) comprising Permanent Secretaries from the key ministries identified above and senior representatives from selected organizations, including Chairs of all Technical Working Groups (TWGs), Confederation of Zimbabwean Industries (CZI), farmer organisations, Non-Governmental Organisations (NGOs), development partners, Bankers Association of Zimbabwe (BAZ), Zimbabwe Council for Higher Education (ZIMCHE) and the Zimbabwe National Chamber of Commerce (ZNCC). The MLAWCRR Permanent Secretary will chair the ASSC.

The ASSC shall be a forum for:-

- Interpreting the policy formulated by Cabinet and ASIMC;
- Providing professional advice to ASIMC;
- Coordinating the Monitoring and Evaluation function;
- Formulating draft policies for consideration by ASIMC after receiving input from TWG and Provincial Agricultural Sector Coordination Committee (PASCCs);
- Providing guidance to the PASCCs.

6.2 Resource Mobilisation

To turnaround Zimbabwe's agricultural sector, there is need to attract diverse resources to finance the development of the sector. The Government shall need to mobilise resources from public and private sources. There is need to reinvigorate the Zimbabwe Agricultural Investment Plan to align with the AU processes for country support which are funded through CAADP Business Meetings. One option would be to immediately hold an investment conference with all key stakeholders including development partners so that they can commit to funding the NAPF. The agricultural investment conference should be preceded by the development of a comprehensive and updated agricultural Investment plan dealing with the eight pillars discussed in chapter 4.

The Government will allocate a significant proportion of its' budget for agriculture sector development in line with the AU Maputo Declaration of 2014 and CAADP in 2003. However, the quality of resource allocation will improve, with a substantial proportion of the agriculture budget allocated to key drivers of

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agricultural and productivity growth. In addition, options for financing and setting up of an Agricultural Fund to finance agricultural development initiatives and subsidies will be pursued.

6.3 Monitoring, Evaluation and Learning System

A robust monitoring, evaluation and learning [MEL] system is an indispensable requirement for the NAPF and any associated strategic plans that are developed to operationalise this framework. The MEL system is required early on to support the development, and later to manage implementation of the policy framework. The MEL provides opportunities for critical reflections on implementation performance, and to change course if necessary, as well as assess the impact and sustainability of the strategic initiatives outlined in planned action. A MEL system also provides opportunities for stakeholders to account to each other, collect evidence, learn and ensure continuous improvement during policy review. To attract international resource commitments, there will be need for strengthening linkage with the AU Malabo Biennial Review process.

The NAPF will be reviewed annually starting in 2019, with a comprehensive review being done every four years of implementation in 2022, 2026, and 2030.



ANNEX 1

Pillar I: Food and Nutrition Security and Resilience

<i>Policy Objective</i>	Ensure food and nutrition security for all through sustainable agricultural intensification, dietary diversification, improved access to land, finance and markets, and other resilience building measure.
<i>Time Frame:</i>	2019-2030.

Indicative Terms of Reference

- Appoint a steering committee or sub-committee to champion the operationalisation of pillar activities;
- Carry out a rapid stocktaking and develop an inventory on what needs to be done by who, resources required and timing;
- Develop an implementation strategy;
- Develop M&E framework and knowledge management system;
- Facilitate resource mobilisation;
- Ensure the food balance sheet is available and regularly updated;
- Ensure a functional multi-sectoral food safety committee is in place;
- Promote the production and consumption of diverse and nutritious food, as well as biofortified food;
- Support the development and implementation of food and nutrition related policies;
- Analyse and review existing food and nutrition policies to ensure harmonisation;
- Monitor and evaluate the food and nutrition sector.

Stakeholders

- MLAWCRR
- Ministry of Health and Child Care, Ministry Local Government, Public Works and National Housing
- Women Affairs, Community, Small and Medium Enterprise Development
- Public Service and Social Welfare
- Office of the President and Cabinet
- Farmer Unions, input manufacturers and suppliers, food distributors
- Agro-food processors, Civil Society and Development Partners
- Academia and Research

Pillar II: Agricultural Knowledge, Technology and Innovation Systems

Policy statement: Increase investment in agricultural research and development, technology and extension and adoption of climate- and business-smart technology and innovation.

Time Frame: 2019-2030

Indicative Terms of Reference

- Appoint a steering committee or sub-committee to champion the operationalisation of pillar activities;
- Carry out a rapid stocktaking and develop an inventory on what needs to be done by who, resources required and timing;
- Develop an implementation strategy;
- Develop M&E framework and knowledge management system;
- Ensure the AKTIS strategic objectives are achieved in line with the policy framework;
- Facilitate resource mobilisation;
- Oversee development of subsector strategies – e.g. ICT in Agriculture strategy or Extension strategy;
- Co-ordinate technology generation and dissemination.

Stakeholders

- MLAWCRR (DR&SS, DAEFT and AGRITEX)
- Ministry of Education
- ARC/Research Council of Zimbabwe
- SIRDC
- Universities and Teachers Colleges (state and non-state)
- Agricultural colleges
- Vocational Training Centres
- Polytechnics (with agriculture courses)
- Agricultural Research Institutions (TRB, PIB, ZSAES, ART and other private sector)
- CG Centres (ICRISAT, ILRI, CIMMYT)
- Farmers and farmers unions
- Mobile Network Operators (Econet, NetOne, and Telecel)
- Private Sector companies – agro-chemicals, solar, other input and technology suppliers

Pillar III: Production and Supply of Agricultural Inputs

Policy statement: Increase the safe, sustainable and precise utilisation of improved productivity-enhancing agricultural inputs.

Time Frame: 2019-2030

Indicative Terms of Reference

- Appoint a steering committee or sub-committee to champion the operationalisation of pillar activities;
- Carry out a rapid stocktaking and develop an inventory on what needs to be done by who, resources required and timing;
- Develop an implementation strategy;
- Develop M&E framework and knowledge management system;
- Facilitate access to information on input and output markets for identified production systems;
- Provide advice on production of good quality and safe agricultural products for the consumers;
- Provide advice on sustainable use of agricultural inputs in relation to climate smart technologies;
- Facilitate agro-ecological classification in view of climate change and the inputs required thereof.

Stakeholders

- MLAWCRR
- Ministry of Industry and Commerce
- Ministry of Finance
- ZINWA
- GMB
- Regulatory Authorities - Vet, Food safety and Port health, DR & SS, MCAZ, Pesticides and Chemicals
- Associations of private sector input suppliers including Fertilisers, Seed, Drugs and Chemicals, Transporters, Packaging, Fuel and Energy
- Farmer Unions and Commodity Association
- Other value chain actors, such as Off-takers and Contractors

Pillar IV: Development of Agricultural Infrastructure

Policy statement: Invest more resources in the development of infrastructure to support agricultural production and marketing.

Time Frame: 2019-2030

Indicative Terms of Reference

- Appoint a steering committee or sub-committee to champion the operationalisation of pillar activities;
- Carry out a rapid stocktaking and develop an inventory on what needs to be done by who, resources required and timing;
- Develop an implementation strategy;
- Develop M&E framework and knowledge management system;
- Develop infrastructure standards for dams, storage, irrigation, dip tanks;
- Resource mobilization;
- Monitoring and evaluating of sub sector policy implementation related to standards, guidelines and regulations.

Stakeholders

- Ministry of Lands, Agriculture, Water, Climate and Rural Resettlement
- Ministry Local Government, Public Works and National Housing
- Ministry Finance and Economic Development
- Reserve Bank of Zimbabwe
- Government Institutions and parastatals (AMA, DDF, GMB, DPF , ZINWA, TRM, TIMB)
- Bankers Association of Zimbabwe
- Farmer Unions and Commodity Associations
- CZI
- NGOs and Development Partners

Pillar V: Agricultural Marketing and Trade Development

Policy Statement: Develop effective and efficient domestic, regional and international agricultural markets.

Time Frame: 2019-2030

Indicative Terms of Reference

- Appoint a steering committee or sub-committee to champion the operationalisation of pillar activities;
- Carry out a rapid stocktaking and develop an inventory on what needs to be done by who, resources required and timing;
- Develop an implementation strategy;
- Develop M&E framework and knowledge management system;
- Coordinate agriculture market and trade development activities;
- Facilitate discussions to assess and review programmes, projects, strategies and regulations;
- Lobbying and advocating for policy change in related issues to marketing and trade development;
- Facilitate the development of commodity strategies;
- Monitoring and evaluating of sub sector policy implementation related to standards, guidelines and regulations;
- Resource mobilisation for implementing market and trade development activities.

Stakeholders

- Farmer Unions and Commodity Associations;
- Regulatory Agencies: Key departments in the Ministry of Lands, Agriculture, Water, Climate and Rural Resettlement, Ministry of Health and Child Care, Ministry of Industry and Commerce, Ministry of Foreign Affairs and International Trade;
- Ministry Local Government, Public Works and National Housing;
- ZIMTRADE;
- Private Sector Representatives: CZI, ZNCC, GMAZ, OEAZ, Merchants Associations Cotton, Tobacco, Horticulture, LMAC amongst others;
- NGOs and Development Partners.

Pillar VI: Agricultural Finance and Credit

Policy statement: To improve agricultural financing.

Time Frame: 2019-2030

Indicative Terms of Reference

- Appoint a steering committee or sub-committee to champion the operationalisation of pillar activities;
- Carry out a rapid stocktaking and develop an inventory on what needs to be done by who, resources required and timing;
- Develop an implementation strategy;
- Develop M&E framework and knowledge management system;
- Assist to identify affordable lines of credit for all value chain players;
- Develop policies that addresses the crowding out of private sector from agricultural financing.

Stakeholders

- Stakeholders
- Ministry Finance and Economic Development
- Reserve Bank of Zimbabwe
- Agricultural Marketing Authority
- Banks and Microfinance Institutions
- Insurance sector
- Farmers and farmer Organisations/Commodity associations
- Transport sector
- Input suppliers
- Development partners
- Civil Society

Pillar VII: Access, Tenure Security and Land Administration

Policy statement: Promote equitable and secure land tenure and rights .
Time Frame: 2019-2030

Indicative Terms of Reference

- Appoint a steering committee or sub-committee to champion the operationalisation of pillar activities;
- Carry out a rapid stocktaking and develop an inventory on what needs to be done by who, resources required and timing;
- Develop an implementation strategy;
- Develop M&E framework and knowledge management system;
- Facilitate strengthening of the land tenure system to confer security of all land rights;
- Facilitate the development of an effective, equitable and efficient land administration system;
- Coordinate the development of a comprehensive land policy.

Stakeholders

- MLAWCRR
- Lands Commission
- Ministry Local Government, Public Works and National Housing
- Ministry Finance and Economic Development
- Mines and Mining Development
- Environment, Tourism and Hospitality Industry
- Women Affairs, Community, Small and Medium Enterprise Development
- Farmer Organisations
- Bankers Association of Zimbabwe
- Civil Society Organisations
- Development partners
- Academia

Pillar VIII: Resilient and Sustainable Agriculture

Policy statement: Improve farmer resilience, increase productivity through mitigation and adaptation to climate shocks and sustainability of agriculture and food systems.

Time Frame: 2019-2030

Indicative Terms of Reference

- Appoint a steering committee or sub-committee to champion the operationalisation of pillar activities;
- Carry out a rapid stocktaking and develop an inventory on what needs to be done by who, resources required and timing;
- Develop an implementation strategy;
- Develop M&E framework and knowledge management system;
- Promote linkages with local and regional best practices to feed into strategic initiative;
- Linking with SDGs;
- Promote feedback between national research and strategic initiatives.

Stakeholders

- MLAWCRR:
- Ministry of Environment, Tourism and Hospitality Industry
- Ministry Finance and Economic Development
- Meteorological Services
- Farmer organisations, commodity associations and forums
- Agroecology Working Group
- Input firms (seed, fertilizer etc.)
- Bankers Association of Zimbabwe
- Insurance Companies
- Civil Society Organisations
- Development partners
- Academia

Pillar IX: Institutional Arrangements for policy Implementation

Time Frame: 2019-2030

Indicative Terms of Reference

- Appoint a steering committee or sub-committee to champion the operationalisation of pillar activities;
- Carry out a rapid stocktaking and develop an inventory on what needs to be done by who, resources required and timing;
- Develop an implementation strategy;
- Develop M&E framework and knowledge management system;
- Periodically receive and review reports from the various pillars;
- Provide policy guidance to all the pillars;
- Coordination of resource mobilisation;
- Monitoring and evaluation of policy implementation;
- Policy implementation oversight;
- Maintain linkages with regional, continental and international initiatives;
- Secretariat is MLAWCRR;
- Frequency of meetings-Quarterly;
- Policy review: Two years and after every two and half years.

Stakeholders

- Office of the President and Cabinet.
- MLAWCRR.
- Ministry of Finance and Economic Development.
- Ministry of Local Government.
- Ministry of Foreign Affairs.
- Ministry of Labour and Social Welfare
- Ministry of Women Affairs Community Small and Medium Enterprise Development.
- Ministry of Public Service Labour and Social Welfare.
- Ministry of Youth, Sports, Arts, and Recreation.
- Ministry of Industry and Commerce.
- Ministry of Health and Child Care.
- Representatives from farmer organisations, private sector, development partners, academia and civil society.

**NATIONAL AGRICULTURE POLICY FRAMEWORK
2019 - 2030**

