

Policies Governing Trade of Maize in Zimbabwe and the Effect on Production and Trade Volume

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Abstract

The study focuses on policies on maize production and subsequent trade volumes in Zimbabwe for the period 2009 to 2020. The analysis takes the form of comparison of the pre- and post-policy implementation situations and infer on effectiveness. Production and trade data have been used to do the comparison of the two periods. The study finds out that Zimbabwe has well developed policies that deal with the production and trade of the said crop. As such it has been able to produce and trade in these crops. However, despite well-developed policies and subsequent trade, the country continues to import the bulk of its food for local consumption due to implementation challenges that render the whole effort of policy formulation ineffective. The study recommends that in order to enhance food security in the country, and subsequent increase in trade volumes, close monitoring of policy implementation is necessary. A policy should run its full cycle before another one is implemented so as to assess effectiveness, thereby avoiding overlapping policies in the maize sector. The study has potential to influence the instituting of a Maize Research and Trade Centre that has the potential to be the key player in maize production and trade business in the country.

Keywords: Cereals, Maize, Policy, Production, Trade.

Introduction

Agricultural policy describes a set of laws relating to domestic agriculture and trade of agricultural products. Governments usually implement agricultural policies with the goal of achieving a specific outcome in the domestic agricultural product markets. Outcomes can involve, for example, a guaranteed supply level, price stability, product quality, product

selection, land use or employment (Aksoy & Beghin, 2004; UNFAO Statistics, 2018 & Lencucha, 2020). Countries in the Southern African Development Community (SADC) region have developed policies that have been driving their agricultural sectors with the aim of increasing production for local consumption and foreign trade. SADC countries have over the years coordinated their policies so as to strengthen their economies by fostering close economic integration. The joint policies are more pronounced in agriculture, as this is the sector that forms the backbone of most of these SADC countries.

In most countries in the SADC region production and trade policies go hand in hand. While a government enhances production, it is also concerned with exports and imports of the same commodity. Cereals, especially maize, are well protected that they cannot be exported or imported at will. This is so as food is a security product. If a country depends on importing such a good its citizens will suffer in times of war and sanctions. The government has to protect such sector in order to remain food self-sufficient even if the sector is not efficient. Governments are well interested in their production, exportation as well as importation (Vink, et al., 2006; African Development Bank, 2019). This research analyses various policies governing production and trade of maize¹ in Zimbabwe, a member of SADC and highlights the policies' effects on production and subsequent trade volumes.

Overview of Policy Implementation in Zimbabwe

Almost all regions in Zimbabwe have environments that are conducive to the production of crops and animal farming. In that case, the production of large volumes of agricultural products leads to trade of such products (NEPAD Report, 2015). This also leads to food security in the country since the country would beef up its stocks in the event of a deficit. According to FAO (2019) much of the agricultural products produced in Zimbabwe include maize, wheat, sorghum, millet, beef, poultry, dairy, sugar and horticultural products, among others. Cereal crops in Zimbabwe form the staple food and as such have special treatment in terms of their production and trade. They need to be regulated to ensure food security in the country (ECOSOC Report, 2008). This may also reduce foreign influence on domestic affairs.

¹ Maize is a major cereal crop produced by Zimbabwe among other cereals such as wheat and sorghum.

SADC countries have enjoyed strong economic performance in the past decade. This has been enhanced by improved domestic policies and favourable external conditions. SADC Report (2011) says that the economy of Zimbabwe had slowed growth, only to show up when it became a member of SADC in 1980. The notable countries that grew faster are the resource rich countries such as Angola and Mozambique (SADC, 2016). Most of the SADC countries getting ahead have managed to foster macroeconomic stability, including low inflation rates and debt sustainability.

Maize, as one of the major cereal crops is a major staple food crop grown and consumed by people with varying food preferences and socio-economic backgrounds in the country. It is consumed in various forms in Zimbabwe, though it is mainly consumed as thick porridge (sadza). This is in addition to many other uses. The central role of maize as a staple food is comparable to that of rice or wheat in Asia, with consumption rates being the highest in eastern and southern Africa. Of the 22 countries in the world where maize forms the highest percentage of calorie intake in the national diet, 16 are in Africa. An estimated 208 million people in SSA depend on maize as a source of food security and economic wellbeing. Maize occupies more than 33 million hectares of Sub Saharan Africa's estimated 200 million hectares of cultivated land (World Bank, 2018).

Achieving national food security, where national food security is mainly defined in terms of access to maize, the main staple food, has been one of the major objectives of agricultural policies adopted since Zimbabwe's independence in 1980. Despite the fact that other food crops, such as sorghum and rice, are alternatives to maize in some parts of the country, maize has remained the main staple food. Zimbabwe is one major producer of cereal crops in SADC with substantial cereal volumes traded across the region. Zimbabwe, even though hit by droughts in 1981/2 and 1992, it managed to be a net exporter of maize up to around 1998 (Rukuni & Tawonezvi, 2006). In order to enhance production of cereals, Zimbabwe adopted various agricultural policies since independence in 1980. The policies were enacted to increase production so as to meet local consumption and export.

Maize production increased from 700,000 tonnes in 2009 to 1,456,000 tonnes in 2014 before going down to 900,000 tonnes in 2017. The imports have been going up from 821,246 tonnes to 821,673 tonnes during the same period. In the wheat sector, Zimbabwe has been doing well as it produced 12,000 tonnes in 2009 and increased to 38,715 in 2017. However due to high demand, imports have been going up from 243,139 tonnes in 2009 to 268,892 tonnes in

2017. The available data shows insignificant figures on exports that declined from 62 tonnes to 1 tonne over the same period. Sorghum production also showed good trends. Production rose from 70,000 tonnes in 2009 to 137,000 tonnes in 2014. Despite poor yields of 40,000 and 46,000 tonnes in 2015 and 2016 respectively, production rose to 69,295 tonnes in 2017. Imports have been rising though (SADC, 2018; Ray & Schaffer, 2016).

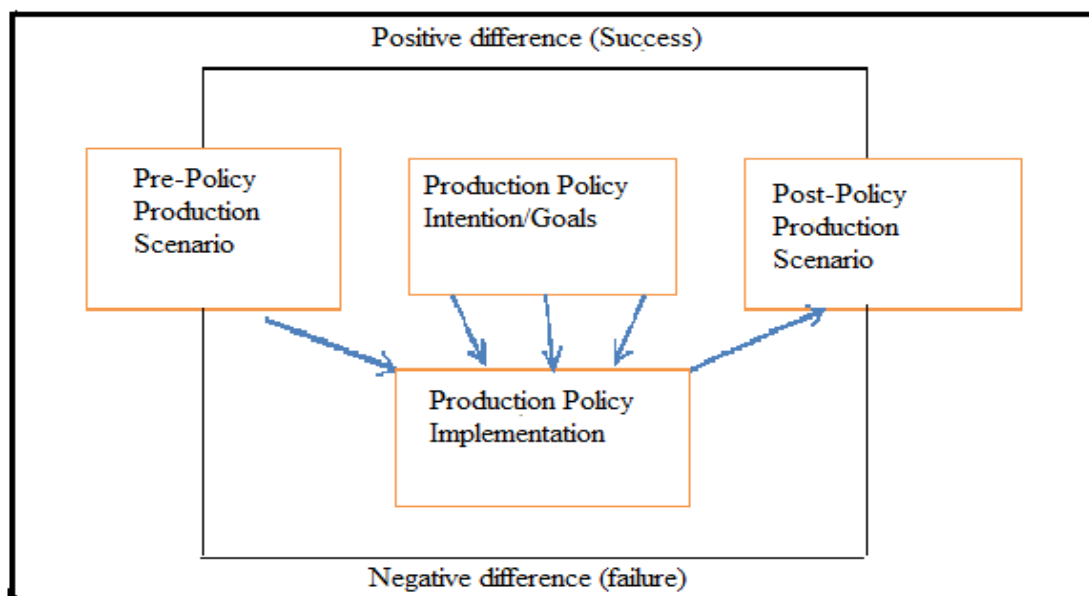
Given the strategic importance of cereal crops in the region there has been an increase in trade among the SADC countries especially the major producers of the commodities that are Malawi, South Africa, Zambia and Zimbabwe. The SADC regulations governing such trade have a large bearing on the volumes of the products moving across borders of member countries hence warranting detailed study on policies governing its production and subsequent trade volume.

The influence of policies governing agricultural production and the subsequent effect on trade volume has been under intense contestations. Various scholars have given divergent views on whether policy enhances agricultural production. Jayasinghe and Sarker (2007) assert positive influence while Claessens (2009) among others argue otherwise. Zimbabwe has been implementing various policies to enhance production in agriculture (cereals included) since 1980 until the present period. However, most seasons the country has not been realising meaningful yields in the sector. The country continues to highly depend on the Western countries for economic survival, especially when dealing with cereal crops. African Development Bank (2012) asserted that SADC countries' (Zimbabwe included) more than 67% of their imports from the Western countries were cereals (mostly maize, wheat, rice and sorghum). Few studies so far in Zimbabwe have been carried out at sectoral level dealing with maize production policy and the subsequent trade volumes. Lack of adequate attention on the impact of policy on maize production has policy implication for the economy of the country. An in-depth study into the impact of such policies assists in the formulation of policy that guarantees food security in the country.

The objectives of the study are to investigate the various policies that influence policies governing trade of maize in Zimbabwe and the effect on production and trade volume, and to come up with relevant production policy conclusion drawn from the outcomes and findings of this research.

Methodology

The analysis takes the form of comparing the pre- and post-policy implementation situations and determine on effectiveness through the outcome of the intended goals of the policy. Production and trade data have been used to do the comparison of the two periods. The analysis is important as it enables enhancement of proper and practical policy formulation in the country. The theoretical framework for the analysis was derived from the inferences of various authors that include Goldberg and Pavcnik (2016) and Onwuegbuzie et al (2012). There is no single best way of illustrating the success of policy. This study analyses the success/failure of agricultural policies of Zimbabwe, by doing a comparison of the pre- and post- policy situations. The study draws inferences on effectiveness by comparing production, export and import data for maize thereby drawing conclusion. This approach has been inferred from the studies carried out by the other researchers (Goldberg & Pavcnik, 2016; Onwuegbuzie et al, 2012). Given in Figure 1 is an illustration of production policy analysis.



Source: Author formulation

Figure 1: Trade Policy Analysis Illustration

Policies are given as intent statements formulated to guide governments on certain activities that would achieve some goals. These are statements that show what should be done and what is intended to be achieved. They reflect the needs, interest and aspirations of society. When the goal is achieved, then a policy is said to have been successful but when the goal is not

achieved then it is deemed to have failed. However, it should be noted that a good policy may fail as a result of many other variables that impede its proper implementation.

Results presentation and discussion

Policy makers in southern Africa have a big challenge of reconciling domestic and foreign policy so as to maintain stability in food supply and prices. Improving cereal production through deliberate policies to enhance such has been widely advocated in order to solve the food insecurity puzzle (Moise & Le Bris, 2013). Recommendations have included the facilitation of providing cheaper inputs and freer grain movement to address isolated shortfalls (SADC, 2003; Engel & Jouanjean, 2013). The Southern Africa Development Community (SADC) region is an integration bloc made up of sixteen countries in sub-Saharan Africa (SSA). Through mostly unilateral national policy, countries of the SADC region have undergone market liberalization policy reforms in the past two decades. These reforms were aimed at promoting freer trade among members (Kaphuka, 2015).

The approach of the analysis is qualitative as each policy is analysed in terms of its effects on production and subsequent trade volumes. The focus is on production, importation and exportation of maize. It should be noted that some of the policies analysed greatly overlap² into each other and other policies are drawn to consolidate and assist some ongoing policies. In some cases there may be major policies assisted by ad-hoc ones that are often implemented seasonally. As a result, the analysis does not separate these policies in terms of their effects for each specific policy. The inference makes an assumption that, in the absence of such combined policy efforts, the production would not be sustained at the given level. The main focus of the analysis is the 2009/2020 period. In this period, Zimbabwe developed comprehensive policies in agriculture to guide production. However, in some cases, reference

² The fact that policies greatly overlap into each other makes it difficult to assess the success and effectiveness of individual policy. The overlapping takes the form of time period of implementation, scope of policies, and crops targeted. Also in some cases the policies target many crops at a time. Some policies are abandoned midway as they are overtaken by new policies. In the process it would be difficult to take stock of what the policies have achieved individually, as the outcome will be a result of a combination of all the policies. The Government of Zimbabwe, for example has often been implementing initiatives like *Maguta* and the current Command Agriculture for the whole agricultural sector, targeting virtually all crops. It would be easier for the government to assess effectiveness if it would target one or two crops for one policy.

is also made to some policies developed before this period. These could be background policies that consolidate the current period.

Zimbabwe's cereal crops sector

Zimbabwe is one major producer of cereal crops in SADC with substantial cereal volumes traded across the region. Zimbabwe, even though hit by droughts in 1981/2 and 1992, managed to be a net exporter of maize up to around 1998. Policies which were drafted were aimed at maximising output and ensuring that the yield is sufficient enough to match local demand and the surplus would be exported to neighbouring countries such as Zambia, Malawi, among others ((Rukuni & Tawonezvi, 2006). Maize is the staple food of Zimbabwe. Its production is done at both subsistence and commercial level. Persistent droughts after 2000 and other economic hardships hit hard on Zimbabwe's cereal production and trading (SADC, 2011).

The government of Zimbabwe has been working hard in order to fulfil its mandate of ensuring food security in the country. The current agricultural policy framework (The Comprehensive Agricultural Policy Framework: 2012-2032) addresses issues concerning crop and livestock production, marketing and trade. The vision of the agriculture sector is 'a prosperous, diverse and competitive agriculture sector, ensuring food and nutrition security significantly contributing to national development' (GoZ, 2017).

Many changes have taken place in the socio-economic environment warranting a review of the national agricultural policy. The Government of Zimbabwe is therefore in the process of finalizing the Zimbabwe Agricultural Framework (2018-2030) whose first draft was in place in June 2018. This has been formulated taking into account the current trends, especially how to sustainably solve the challenges post the fast track land reform.

The policies of Zimbabwe have not been targeting specific cereal crops per se but promoted all cereals, except in special cases where the policy would target wheat growing since this crop could be singled out for winter cropping. Appendix 1 is an outline of the various policies which have been adopted by the government of Zimbabwe for the overall agricultural sector since the 1980s.

The policies given in Appendix 1 had the mandate of increasing production to meet local consumption. If there is a surplus it would be exported. The Grain Marketing Board (GMB)

has the mandate to oversee such trade.³ After independence, the government of Zimbabwe sought mainly to maintain the dual agriculture system it inherited. However, it emphasized its efforts more on assisting black small-scale and communal farmers. It subsidised inputs, promoted conservation farming techniques, among many initiatives. Every season, the government allocated foreign exchange budget to trade associations to help with the importation of inputs. The overall policy objective was to promote national self-sufficiency in food. The government was heavily involved and favoured the production of certain crops such as maize, wheat and other small grains.

The Economic Structural Adjustment Programme (ESAP) led the government to abandon this involvement in agriculture as it adopted a liberal, market-oriented macroeconomic policy. This promoted trade liberalization, specifically lifting government controls and removing subsidies. In agriculture, this meant reducing intervention, eliminating food subsidies and liberalizing trade.

According to Anseeuw, Kapuya and Saruchera (2012) and Thomson, Kentikelenis, and Stubbs (2017) the government had to devise a new and relevant policy in line with the ESAP. It made several attempts, the first being the Zimbabwe Agricultural Policy Framework and Strategy: 1995–2020, which promoted land reform, institutional development that focused on efficient and more private service delivery to small-scale farmers. It also focused on increased food production to ensure household food security.

Under the Zim-ASSET Food Security and Nutrition Cluster (2013) and Comprehensive Agricultural Policy (2012), the government focused on increasing crop productivity, production as well as diversification. To achieve these goals, the government introduced the *Maguta* programme. This was also coupled by the Presidential Input Scheme during the period. This has been followed by the currently running Command Agriculture initiative since 2016. These policy initiatives demonstrate government support for agriculture through availing inputs to farmers.

Given below is Table 1 showing cereals production, consumption and trade volumes for Zimbabwe. Despite low production levels the policies have managed to enhance production

³GMB has the mandate to maintain minimum strategic reserves of 500,000 tonnes of grain crops in physical stock. In this case exports would be considered after meeting this requirement. However, low productivity and production in the past few years has made it difficult to maintain strategic grain reserves at that level.

in the country. The exports are depressed due to high local consumption. Although Zimbabwe continues to import cereals, the imports have been decreasing due to high production. The 2012 production figures are low due to drought experienced during the period. However, when the government introduced the agricultural policies (the Zim-ASSET Food Security and Nutrition Cluster of 2013 and Comprehensive Agricultural Policy from 2012), the production levels began to go up. Maize production levels have been rising as from 2012 while imports were also going down for the same period (See Figures given below that illustrate these trends for maize production).

Table 1: Maize Production, Consumption and Trade Volumes for Zimbabwe (tonnes)

Year	Production (tonnes)	Consumption	Imports	Exports	Net Export/Import
Maize					
2009	700,000	1,521,182	821,246	64	(821,182)
2010	1,192,399	1,366,120	173,824	103	(173,721)
2011	1,452,000	1,910,182	459,171	989	(458,182)
2012	968,000	1,400,925	435,375	2,450	(432,925)
2013	799,000	1,102,477	304,532	1,055	(303,477)
2014	1,456,000	1,743,099	287,431	332	(287,099)
2015	642,793	1,214,128	571,775	440	(571,335)
2016	511,816	1,332,851	821,672	631	(821,041)
2017	1,532,572	1,838,515	308,267	2,324	(305,943)
2018	1,560,100	1,652,111	92,847	836	(92,011)
2019	509,322	581,769	73,601	1,154	(72,447)
2020	1,202,347	2,092,815	894,952	4,484	(890,468)

Source: Calculated from FAO Statistics Division data (2018). FAO GIEWS Country Cereal Balance Sheets (2021). World Integrated Trade Solution (WITS) (2021). Ministry of Agriculture (Zimbabwe) (2021)

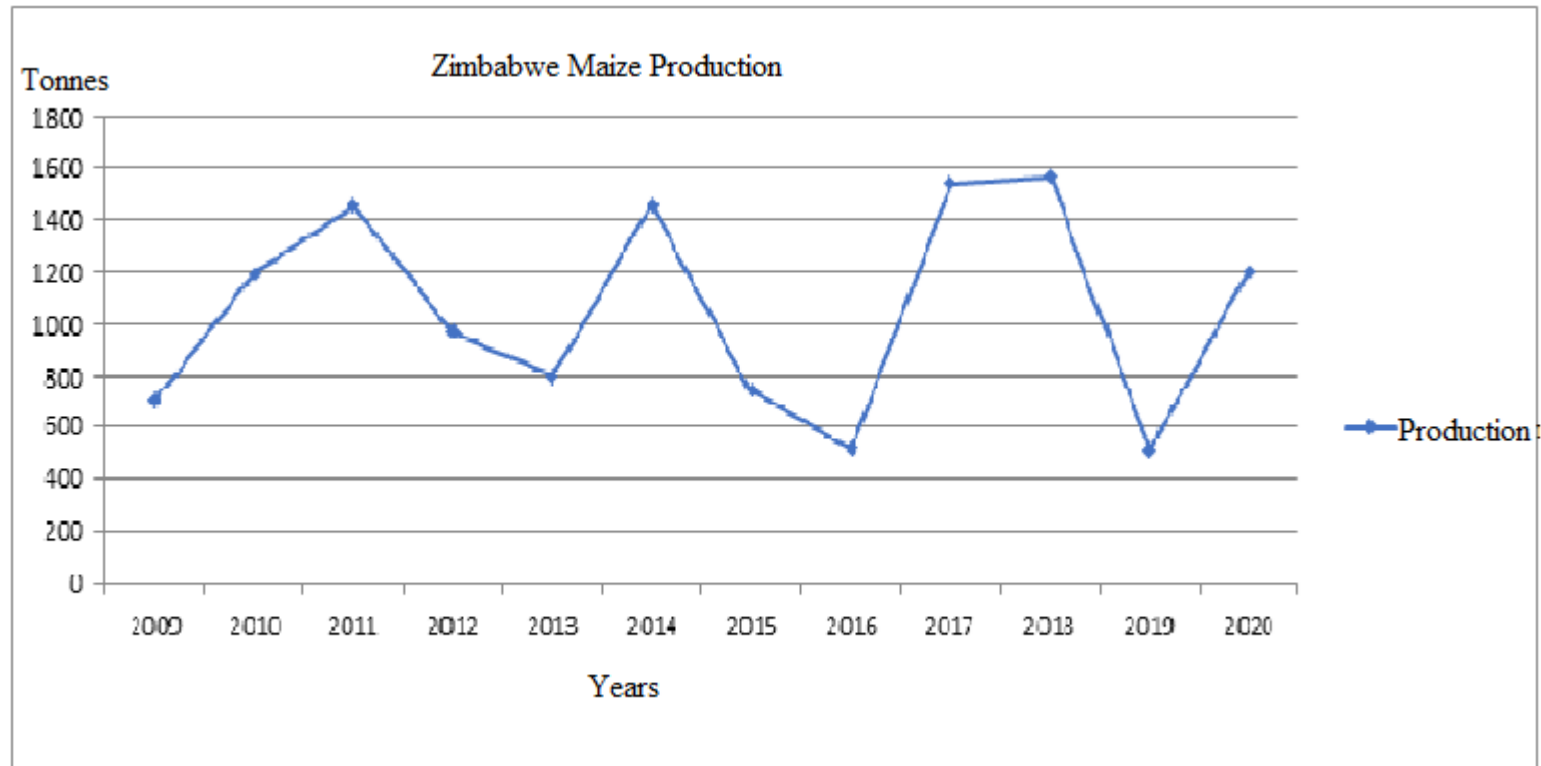


Figure 2: Zimbabwe Production of Maize (000) metric tonnes (2009-2020)

Source: Constructed using FAO Statistics Division data (2021)



Figure 3: Exports and Imports of Maize (000) metric tonnes

Source: Constructed using FAO Statistics Division data (2021)

Impact on production and trade volumes

To enhance production of maize, Zimbabwe adopted various agricultural policies since independence in 1980. The policies were enacted to increase production so as to meet local consumption and export. It subsidized inputs and promoted conservation farming techniques. The policies included several frameworks contained in blue prints such as the Economic Structural Adjustment Programme (ESAP) of 1991-1995; the Zimbabwe Agricultural Policy Framework and Strategy, 1995–2020; and the Zimbabwe Agenda for Sustainable Socio-Economic Transformation (Zim-ASSET) of 2013, the Comprehensive Agricultural Policy (2012), the *Maguta* programme, coupled by the Presidential Input Scheme during the period. This has been followed by the currently running Command Agriculture initiative.

Maize production increased from 700,000 tonnes in 2009 to 1,456,000 tonnes in 2014 before going down to 511,816 tonnes in 2016. Then production rose again until 2020 to 1,202,347 tonnes, except in 2019 when yields were depressed. The imports have been going up from 821,246 tonnes to 894,952 tonnes during the same period. Exports have been fluctuating. This has been so due to the drought that hit the country in the 2012/13 planting season. The 2017 and 2018 yields were good. In 2019 there were depressed yields while in 2020 Zimbabwe realised 1,202,347 tonnes in the country.

As the statistics show, Zimbabwe has been a net importer of maize for the past decade. While the policies managed to enhance production of maize in some way, had little influence on trade, as the volumes were too low to cover the domestic demand and then remain with surplus. The period under study was marred with economic underperformance due to policy inconsistencies in the agricultural sector. Policies also overlapped into each other making it difficult to assess the success of individual policies. Also the fact that we do not have policies targeting specific crops it is not easy to assess the success of a policy on specific cereal when it only focuses on the whole agriculture sector. All the maize produced during this period was consumed within the country. The country covered the shortage gap with imports mainly from the Southern African Development Community countries.

These results are almost similar to those found on Kenya and Nigeria. Kenya has been making heavy investments in agricultural infrastructure as part of its production enhancement initiatives. Despite this, the agricultural sector in Kenya is still constrained by market inefficiencies such as price constraints for agricultural produce. This provides disincentives

for crop production in the country. Another case shows that Nigeria implemented various strategies in agriculture over the past decade. This however resulted in notable changes in the production levels in agriculture for the better, especially the cereal crops.

There has been a different scenario in Asia, where China has managed to do well with its policies in the production of cereals and in its overall agricultural production. It produces about 18% of the world's cereal grains, making it the world's largest agricultural economy. India is another Asian country that has done well in its cereal production. The increase in cereal production has been attributed to sound policies implemented by the government.

Conclusion

The study focused on the policy analysis on production, importation and exportation of maize in Zimbabwe. To enhance maize production, Zimbabwe adopted various agricultural policies since independence in 1980. The policies were enacted to increase production to meet local consumption and export. Maize production rose steadily within the 2009 to 2020 period. Imports have been going up too due to high demand of the staple cereal crop. Exports have been fluctuating as a result of the high demand. Trends of production, exports and imports have shown changes from pre – to post-policy implementation in Zimbabwe. Despite the general fluctuations in exports and imports during the period under study, government policies could be seen to influence production and trade of cereals in Zimbabwe. However, the country remains a net importer of the cereals crop, due to high demand for maize and also because of the fact that trade of the crop is highly regulated.

Recommendations

Despite sound policies that enhance production and subsequent trade of cereals, Zimbabwe should improve on its policy implementation. Some policies are abandoned midway as they are overtaken by new policies. This is the case where the Command Agriculture policy has been so pronounced that it overshadowed the other on-going reforms and initiatives. In the process, it would be difficult to take stock of what other policies have achieved. The study recommends that in order to enhance food security in the country, and subsequent increase in trade volumes, formulation of cereal specific policies and close monitoring of policy implementation is necessary. The study also recommends the instituting of a Maize Research and Trade Centre. This Centre will be tasked with the mandate of being

Government advisor in matters of maize production, policy formulation and implementation, and advise of the importation and exportation of the crop, in conjunction with the Grain Marketing Board. Maize occupies a strategic position in food security as it is the main staple food in the country as such it is a strategic product which should be given importance in its handling.

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Appendix 1: Agriculture and Food Security Policies in Zimbabwe

Period	Sector	Policy	Description
1980-1990	Agriculture	High regulation and control policies ⁴ (restricted the trading of cereal grains to be centrally carried out by the Grain Marketing Board)	Maintaining the dual agricultural system. Continuation of the pre-independence government controls, with bias towards black small-scale and communal farmers (these received subsidised inputs and protected marketing). National food security was a priority.
1991– 1998	Agriculture	Liberalised policies	Trade liberalisation begins, founded in the macroeconomic reforms' proposed market-based economy. Abandonment of controls and subsidies, although the grain sector remained partially controlled. The start of efforts to write national agricultural policies.
	Food security	No official policy	Government prioritises food security by controlling trade in grains and funding relief aid (with help of NGOs) in years of drought.
1995	Agriculture	Zimbabwe Agricultural Policy Framework and Strategy, 1995–2020	Assuring national and household food and nutrition security Ensuring the existing agricultural resource base is maintained and improved. Generate income and employment to feasible optimum levels. Increase agriculture's contribution to the Gross Domestic Product (GDP). Contribute to sustainable industrial development through the

⁴ This was before Economic Structural Adjustment Programme (ESAP) (1991-5). The current situation is a partial liberalized scenario where private players have significant role in the trade of cereal crops in the country, although the government still controls the movement of these commodities.

			<p>provision of home-grown agricultural raw materials.</p> <p>Expand significantly the sector's contribution to the national balance of payments.</p>
2000– 2008	<p>Agriculture</p> <p>Food security</p>	<p>Return of regularisation</p> <p>No official policy</p>	<p>Production falls drastically after the FTLRP. All efforts to craft national policy fail and the government becomes highly involved in trade regulation again. The central bank bankrolls national agricultural projects, and marketing of most produce (cereals are tightly controlled).</p> <p>Severely reduced agricultural production and lack of funds dampen national food security programmes. Government relies on the World Food Programme (WFP)</p>
2009-2011	Agriculture	Mixed approach	Government partly liberalises agricultural trade again. Grain trade uncontrolled for the first time. Government funds input projects to communal and resettled farmers. Non-governmental organisations also assist.
2012-2017	Agriculture	Mixed approach (under Zim-ASSET Food Security and Nutrition Cluster (2013) and Comprehensive Agricultural Policy (2012) focusing on increasing crop productivity and production; and increasing crop diversification	<p>Government introduces Maguta⁵ programme. This was also coupled by the Presidential Input scheme during the period (2015) that benefitted 300 000 small scale farmers from \$28 million facility. This was followed by Command agriculture. There is support of farmers through availing inputs.</p> <p>Setting up an agriculture fund to subsidise inputs.</p> <p>Promotion of sustainable agricultural production including conservation agriculture techniques.</p>

⁵ In local Shona language Maguta means bumper harvest. This was a government programme that entailed providing farmers with the requisite resources and technical skills, to optimally produce specific crops. The programme was led by the Zimbabwean army.

			Diversify cropping patterns at national level through supporting the production of small grains especially in the drought prone areas.
2018	Agriculture	Zimbabwe Agricultural Framework (2018-2030)	Mechanisation and development of agricultural infrastructure. Increasing production and supply of agricultural inputs. Marketing and trade development. Increasing access to finance and credit. Land tenure.

Source: Compiled from information sourced from Ministry of Agriculture (Zimbabwe) (2021)

