



COUNTRY FACT SHEET ON FOOD AND AGRICULTURE POLICY TRENDS

Socio-economic context and role of agriculture

Zimbabwe is a low-income and landlocked country in Southern Africa, once known as the breadbasket of Africa. During the period from 2000 to 2008 the country experienced severe macroeconomic instability characterized by hyperinflation.¹ Real GDP declined by more than 40 percent and agricultural output shrank. This resulted in a deep economic and social crisis, with the country becoming a net food importer and a large proportion of the population relying on food aid. After disputed elections in 2008, the political and macroeconomic environment regained stability with the creation of a government of national unity and the adoption of the multicurrency regime in early 2009. The period

2009–2012 was marked by an economic rebound, with growth rates averaging 10 percent per annum. However, after relative stabilization, economic growth declined sharply (from 10.6 percent in 2012 to 3.8 percent in 2014) due to deteriorating terms of trade, a severe drought in 2012/13, and continued political uncertainty. Agriculture is the cornerstone of the Zimbabwean economy, contributing 15 to 20 percent of GDP and providing livelihoods for about 70 percent of the population. Major constraints affecting the agricultural sector include limited access to market information, unreliable supply of affordable inputs, lack of agricultural financing, high transportation

| Selected indicators | | 2007 | 2011 | 2015 | |
|---|---|--|---|----------------------|-------------------------|
| SOCIO-ECONOMIC | GDP (current billion US\$) * | 5.3 | 11.0 | 13.9 | |
| | GDP per capita (current US\$) * | 398 | 769 | 890 | |
| | Agricultural value added (% of GDP) * | 21.6 | 13.2 | 12.5 | |
| | Agricultural value added (annual % growth)* | (average 2007-2015) | 0.8 | | |
| | | (2015) | -5.2 | | |
| | Total population (thousand) | 13.3 | 14.3 | 15.6 | |
| Rural population (% of total) | 63.5 | 62.8 | 65.2 | | |
| Agricultural labour force (% of total labour force) | na | 66 | na | | |
| Human Development Index ** | (2015) | 0.509 (rank 155) | | | |
| AGRICULTURAL PRODUCTION & TRADE | Per capita cultivated land (ha) | 0.31 | 0.28 (2012) | na | |
| | Area equipped for irrigation (ha) | 174 000 (2012) | | | |
| | Value of total agriculture (current million US\$) | na | 409.9 | 865.3 (2013) | |
| | Value of cereals production (current million US\$) | na | 468.7 | 280.1 (2013) | |
| | Yield for cereals (hg/ha) | 6 531 | 7 936 | 7 887 (2014) | |
| | Cereal import dependency ratio (%) | | 39.2 (av. 2006-2008) | 42.7 (av. 2010-2012) | ba |
| | Top 3 commodities | Production quantity (2012) | Sugar cane; Maize; Milk | | |
| | | Production value (2012) | Cattle (meat indigenous); Tobacco (unmanufactured); Cotton lint | | |
| | | Import quantity (2011) | Maize; Wheat; Wheat flour | | |
| | | Import value (2011) | Wheat; Sunflower oil; Maize | | |
| Export quantity (2011) | | Tobacco (unmanufactured); Cotton lint; Sugar raw centrifugal | | | |
| Export value (2011) | | Tobacco (unmanufactured); Cotton lint; Cigarettes | | | |
| Top 3 trade partners (2011) | Import value | South Africa; Zambia; Malawi | | | |
| | Export value | South Africa; China; China (mainland) | | | |
| FOOD SECURITY & NUTRITION | Top 3 commodities available for consumption | | Maize and products; Wheat and products; Sugar (raw equivalent) | | |
| | Dietary energy supply (kcal/capita/day) | | 2 109 | 2 200 | 2 110 (2013) |
| | General (g) and Food (f) CPI (2000=100) | | 358 (g), 444 (f) | 107 (g), 108 (f) | 112 (g), 111 (f) (2014) |
| | Number of people undernourished (million) | (3-year average) | 4.9 (2006-2008) | 4.5 (2010-2012) | 5.0 (2014-2016) |
| | Proportion of undernourished in total population (%) | (3-year average) | 38.6 (2006-2008) | 33.5 (2010-2012) | 33.4 (2014-2016) |
| | Prevalence of underweight among children under 5 years of age (%) | | 14 (2005) | 10 (2010) | 11.2 (2014) |
| | Prevalence of stunting among children under 5 years of age (%) | | 35.8 (2005) | 32.3 (2010) | 27.6 (2014) |
| | Prevalence of wasting among children under 5 years of age (%) | | 7.3 (2005) | 3.1 (2010) | 3.3 (2014) |
| | Global Hunger Index ^ | (2015) | 30.8 (serious) | | |
| | Access to improved water sources (% of population) * | | 78.4 | 77.9 | 76.9 |

Sources: FAOSTAT; *WB; **UNDP; ^IFPRI. [Accessed on 26 July 2016]

1 Economic Survey of Pakistan, 2015-16 (available at www.finance.gov.pk/survey/chapters_16/02_Agriculture.pdf).
 2 The 2010 flood caused the loss of 2.4 million hectares of unharvested crops, and damages estimated at US\$5.1 billion. The flood devastated a large portion of Pakistan's most fertile land, including the breadbasket province of Punjab. See www.fao.org/fileadmin/user_upload/emergencies/docs/PakistanFloods1yrBrochure.pdf.
 3 FAO, *State of Food Insecurity in the World*, 2015 (available at www.fao.org/3/a-i4646e.pdf).

costs due to inadequate road infrastructure, and vulnerability to weather-related shocks. Since 2000, the country has experienced a negative trend in the production and productivity of its main staple cereals, maize and wheat, which has compromised national and household food and nutrition security.

Zimbabwe continues to face persistent levels of chronic malnutrition. According to the most recent Demographic and Health Survey (ZDHS 2010/11), nearly one-third of children (32 percent) under 5 years of age are stunted. While the prevalence

of acute malnutrition (wasting) and underweight appears to be declining slightly when compared with the early 1990s, the situation of stunting remains stagnant at best. Currently, Zimbabwe still ranks as one of the poorest countries in the world, with 72 percent of the population living below the national poverty line.² In addition to the high level of poverty, Zimbabwe also has a young population (with 67 percent aged 24 years and below) whose access to and utilization of basic social services remain low.

1. Government objectives in agriculture and food and nutrition security

The **Zimbabwe Agenda for Sustainable Socio-Economic Transformation (ZimAsset, 2013–2018)** was adopted in 2013 as the new economic development blueprint, replacing the Medium Term Plan 2010–2015, which was never fully implemented.³ ZimAsset has the objective of driving Zimbabwe's economic recovery until 2018, and is structured around four strategic clusters⁴ and two subclusters⁵ that will enable the country to achieve economic growth.⁶ In ZimAsset, the agriculture sector is identified as one of the key drivers of growth and employment creation. The ZimAsset policy on agriculture aims at ensuring food and nutrition security at the household and national level, as well as increasing agriculture production, productivity and quality.

Zimbabwe signed the Comprehensive Africa Agriculture Development Programme (CAADP) Compact in November 2013 and developed the **Zimbabwe Agricultural Investment Plan 2013–2017 (ZAIP)** to align investments in the agricultural sector to the CAADP principles. However, the ZAIP has not yet been implemented owing to the lack of buy-in from the main multilateral and bilateral partners.

Currently, Zimbabwe does not have a long-term agricultural policy; because of the changes produced in the agriculture sector by the land reform programme adopted in 2000, the Agricultural Policy Framework 1995–2020 is no longer valid. A new **Comprehensive Agricultural Policy Framework (2012–2032)** was developed in 2012 with assistance from FAO, but it remains a draft and has yet to be adopted.

In May 2013, the Food and **Nutrition Security Policy (FNSP)** was officially launched, after a long consultative process started in 1998 and led by the Food and Nutrition Council. The FNSP promotes a multisectoral and multistakeholder approach to addressing food and nutrition security. It is organized around a number of commitments in the areas of food security, social assistance, food safety standards, and nutrition security (including WASH⁷ and health services). The policy also foresees the creation of an integrated information system covering food security and nutrition assessment, analysis and early warning.⁸

2. Trends in key policy decisions (2007-2016)

2.1 Producer-oriented policy decisions

Over the period from 2007 to 2016, Zimbabwe experienced fluctuating production levels with a declining general trend for maize and wheat, but also for cash crops such as cotton and soybean. Some of the government's responses included direct inputs assistance to farmers, provision of extension services, and

liberalization and deregulation measures, as well as increased investments in irrigation development. However, the financial constraints faced by the government, together with a number of weather-related shocks, have considerably limited the impact of these measures on agricultural production and development.

2 See <http://data.worldbank.org/indicator/SI.POV.NAHC/countries/ZW?display=default>.

3 United Nations Development Group, Zimbabwe Country Analysis. Working Document, Final Draft, 3 October 2014 (available at <https://ims.undg.org/downloadFile/7e40fe82fedf-cf6fb-92306b459a8c1bdd0d13cc9ea8e9a18cadbbd1471b38176>).

4 Namely, Food Security and Nutrition, Social Services and Poverty Eradication, Infrastructure and Utilities, and Value Addition and Beneficiation.

5 Namely, Fiscal Reform Measures, and Public Administration, Governance and Performance Management.

6 These priorities have also been outlined in the Zimbabwe Accelerated Economic Recovery and Growth (2016–2018) document of December 2015, which is a mid-term review of ZimAsset.

7 WASH stands for Water, Sanitation and Hygiene.

8 The Food and Nutrition Council, established in 2001, is currently leading the development of an integrated Food and Nutrition Security Information System (FNSIS), aimed at providing timely and reliable information on the food and nutrition security situation in the country and the effectiveness of programmes to inform decision-making. The FNSIS will be developed with financial support from the European Union, FAO and UNICEF and will build on existing information systems at national and subnational levels, such as the ZimVAC livelihoods baselines and annual assessments.

Input subsidies represent a government priority, but their supply remains uncertain

Several input subsidy schemes have been implemented to assist farmers by providing them with free or heavily subsidized inputs (mainly seeds and fertilizers). Some of these programmes are ongoing and are either government or donor-funded, or private input schemes. One of these is the Presidential Agricultural Input Support Scheme that was launched for the 2013/14 farming season, targeting 1.6 million households at a total cost of US\$161 million.⁹ The input packages were mainly distributed through the Grain Marketing Board (GMB) depots throughout the country. However, this became a major challenge for the scheme, as GMB depots are not situated in all farming communities, and very often the GMB failed to deliver inputs on time for the planting season because of logistical problems.¹⁰ Recently, free direct input distributions have been minimized in favour of the use of subsidized vouchers and contract farming arrangements. The use of electronic vouchers has also been tested by the Ministry of Agriculture, Mechanization and Irrigation Development (MoAMID), with support from FAO and other partners. The e-vouchers system

gives farmers the choice of the inputs they need, but they are also required to contribute to the voucher's cost.¹¹ Even if the provision of input subsidies remains a government priority (as also stated in ZimAsset), farmers continue to face challenges linked to the shortage and uncertainty of input supplies.

Unresolved land tenure issues

Traditionally, Zimbabwe's agricultural sector had a dualistic nature, comprising large-scale commercial farms (covering about 80 percent of the total land area and growing mainly cash crops, like tobacco) and small-scale producers cultivating food crops. In 2000, the President launched the Fast Track Land Reform Programme (FTLRP), which redistributed about 20 percent of the country's total land¹² through compulsory acquisition of white commercial farmers' land, and by creating small to medium-sized land holdings from what were previously large-scale farms. The land reform brought in significant changes in the agrarian sector, with the most notable being shifts in agricultural production and marketing patterns. Since the launch of the FTLRP, however, insecurity of tenure remains an issue, as the resettled farmers lack proper title deeds and are not able to use their land as collateral to obtain credit from financial institutions. Additional unresolved issues include weak land transfer mechanisms and support institutions, inconsistent procedures of land administration, and unclear compensation models for current and future displaced farmers.¹³ One of the government's targets for 2016 is the establishment of the Land Commission in charge of regulating and managing land acquisition and settlement. A Land Commission Bill has already been drafted for submission to the Cabinet. Moreover, the government, with FAO's support, will develop a comprehensive Land Policy, as well as a clear and robust legal framework to resolve all outstanding land issues, including multiple land ownership and security of tenure.

Declining role of the Grain Marketing Board

Since 2009, the marketing of cereals has been deregulated, with the parastatal Grain Marketing Board (GMB)¹⁴ acting as buyer of last resort and maintaining a minimum floor price on maize and wheat at levels well above the market price. However, the results of this liberalization have been varied. Due to financial constraints, the government has regularly failed to provide funds to the GMB on time for the purchase of maize, which has resulted in farmers preferring to sell maize at a lower price to private buyers and middleman offering immediate payments.¹⁵ In some cases,

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Cattle showing visible signs of the effect of drought. In 2015/16, Zimbabwe is experiencing its worst drought since the one happened in 1991/92 that killed more than one million cattle. Despite the crisis faced by the livestock sector since the 1990s, cattle and goats still represent a major sources of livelihood for agro-ecologically fragile regions of the country (which include Matabeleland, Masvingo, Midlands and the northern parts of the Mashonaland provinces) where rural poverty tends to be concentrated.

9 For reference, see www.consiliencejournal.org/index.php/consilience/article/viewFile/400/235.

10 Ibid.

11 For more details, see www.fao.org/fileadmin/user_upload/emergencies/docs/2_E-voucher_Zimbabwe.pdf.

12 Scoones, I., Marongwe, N., Mavedzenge, B., Murimbarimba, F., Mahenehene, J. and Sukume, C. 2011. *Zimbabwe's Land Reform: A summary of findings*. Brighton, UK, IDS.

13 Government of the Republic of Zimbabwe and FAO, Country Programme Framework 2012–2015.

14 The Grain Marketing Board (GMB) was established in 1931 as the Maize Control Board, and is a state-owned enterprise with a network of depots throughout the country. The GMB trades cereals and oilseeds and provides logistics services to the agricultural industry as well as processing of products. The GMB is also mandated to maintain a Strategic Grain Reserve of a minimum of 500 000 tonnes of maize and wheat, and cash reserves sufficient to import 436 000 tonnes of maize.

15 Parliament of Zimbabwe, Report of the Public Accounts Committee on the GMB, 19 November 2015 (available at www.parlzim.gov.zw/national-assembly-hansard/national-assembly-hansard-19-november-2015-vol-42-no-22).

late payments for maize deliveries have also discouraged farmers from growing maize and rather encouraged them to shift to cash crops, such as tobacco. Moreover, with the GMB prices higher than import parity, farmers find it difficult to sell their produce to local traders and millers because they cannot compete with imported commodities. In most years since 2009, the GMB has not maintained adequate levels of the Strategic Grain Reserve (SGR) nor has it ensured proper storage of maize, owing to shortage of funds. Therefore, the role of the GMB in the country's grain output market is declining and the government has been urged to revise the functions and scope of the GMB, with the recommendation of scaling down commercial activities and focusing on its core mandate of managing the SGR.¹⁶ The government has also been encouraged to review the levels of the SGR in order to meet the requirements of the increased population.

Need for increased investments in irrigation rehabilitation and development

Zimbabwe is a semi-arid country and its agriculture is mainly rainfed. Because most of the country receives limited and erratic rainfall, irrigation is a prerequisite for successful crop production. The country has an untapped irrigation potential of nearly 1.5 million ha, whereas the area equipped for irrigation is estimated at approximately 200 000 ha.¹⁷ Zimbabwe has a great number of underutilized small and medium-sized dams¹⁸ and dilapidated small irrigation schemes. Similarly, many irrigation facilities on former commercial large-scale farms are in a state of disrepair.¹⁹ The government has clearly pointed out the need for increasing investments in irrigation, particularly in the rehabilitation of the existing facilities. However, even if the budget allocated to irrigation has increased over the years, it remains very low (accounting for less than 3 percent of the total agricultural budget) and inadequate. There are currently a number of ongoing projects to rehabilitate irrigation infrastructures, with funding mainly from the government as well as multilateral and bilateral donors.²⁰ In 2015/16, the government allocated US\$7 million to irrigation development, which complements the US\$8.6 million allocated by development partners. Moreover, the government is currently implementing the Climate Resilient National Water Resources and Irrigation Master Plan, which aims to integrate climate change modelling with development and management of water resources and irrigation infrastructure.

¹⁶ Ibid.

¹⁷ Zawe, C., Madyiwa, S. and Matete, M. 2015. *Trends and Outlook: Agricultural Water Management in Southern Africa. Country Report Zimbabwe*, USAID, (available at <https://agrilinks.org/sites/default/files/resource/files/Country%20Report%20Zimbabwe.pdf>).

¹⁸ According to a World Bank report, the country has about 8 000 dams and reservoirs for storing raw water, most of which were built for irrigation. See www-wds.worldbank.org/external/default/WDSContentServer/WDS/IB/2016/02/29/090224b0841be816/1_0/Rendered/PDF/Zimbabwe0infrastructure0policy0review.pdf.

¹⁹ Government of the Republic of Zimbabwe and FAO, *Country Programme Framework 2012–2015*.

²⁰ MINAGRI website. Accessed on 23 May 2016. www.minagri.gov.rw/index.php?id=28

²¹ World Food Programme, *Zimbabwe Country Strategic Plan (2016–2020)*, 21 September 2015 (available at <http://documents.wfp.org/stellent/groups/public/documents/resources/wfp277426.pdf>).

²² The Harmonised Social Cash Transfer programme was introduced under the 2nd phase (2011–2015) of the National Action Plan for Orphans and Vulnerable Children (NAP II), and implemented by the Government of Zimbabwe through the Ministry of Public Service, Labour and Social Welfare. Funding for NAP II is provided through the Child Protection Fund, with support from a pool of donors.

2.2 Consumer-oriented policy decisions

Zimbabwe's main human development indicators have deteriorated in recent years due to the country's negative economic performance, which has increased the number of vulnerable groups requiring assistance. Considering its limited financial resources, the government has given priority to restoring basic social services in health and education, as well as to supporting some existing social safety nets, including food assistance to vulnerable households, public works programmes, and child supplementary feeding.

Nutrition is high on the government's agenda, but financial resources are inadequate

The Government of Zimbabwe has shown its commitment to prioritize nutrition in its political agenda by joining the Scaling Up Nutrition (SUN) Initiative in 2011 and adopting the National Food and Nutrition Security Policy (NFNSP) in 2013, which promotes a multisectoral approach to addressing food and nutrition insecurity. The NFNSP is currently being disseminated at provincial and district levels. In 2015, two important documents were launched: the National Nutrition Strategy 2014–2018, which will guide the implementation of nutrition-specific and sensitive interventions, particularly aimed at addressing child malnutrition, and the National Food Fortification Strategy, which provides guidance for industrial food fortification of wheat flour, maize meal, cooking oil and sugar, with selected micronutrients (mainly iron, zinc, vitamin A and selected vitamins B). Despite these commitments, the resources allocated to nutrition activities in the country represent less than 1 percent of the total national budget, according to WFP.²¹

Towards the development of a comprehensive Social Protection Policy Framework

Social protection (SP) is a component of one of the four national priority areas of the 2013 ZimAsset, as well as one of the development priorities of the recently adopted Zimbabwe United Nations Development Assistance Framework (ZUNDAF 2016–2020). The existing SP programmes have been adversely affected by the country's economic instability and reduced fiscal revenue; therefore they remain fragmented and limited, both in scope and coverage. An example is the Harmonised Social Cash Transfer (HSCT)²² – introduced in 2011 with financial and technical

support from UNICEF – targeting the poorest households who are both labour-constrained and food-poor. The HSCT currently covers about 55 000 households but the aim is to expand the coverage to 200 000 households by 2018, with support from development partners. In July 2015, the government presented a draft Social Protection Policy Framework that aims at strengthening the existing social protection system, increasing harmonization across programmes, and ensuring overall policy coherence to effectively address the varied vulnerabilities of the population.

2.3 Trade-oriented and macroeconomic policy decisions

Since 2001, Zimbabwe has been experiencing a structural maize deficit, resulting in a reversal of its status from being the largest net food exporter in Southern Africa to that of a food deficit country. To satisfy the national requirement of about 1.8 million tonnes (for both human and livestock consumption), Zimbabwe has to rely on regional imports (mainly from South Africa, Zambia and Malawi), which have been increasing in recent years. Wheat production has also been declining since 2001 and currently the country imports about 95 percent of its estimated 450 000 tonnes per annum requirement. In terms of exports, the country continues to rely on a narrow export base mainly dominated by minerals (gold, nickel and diamonds) and tobacco (by far the most important export crop). Zimbabwe is currently the 6th largest tobacco exporter in the world.

Variable import trade policies

In August 2008, the government undertook a grain market liberalization by removing all duties and import restrictions on a number of commodities, including maize and wheat. The liberalization led to the emergence of private traders, which currently play a key role in the country's trade sector. Following a good harvest in 2013/14, the government imposed a ban on

maize imports in order to protect local producers; this was then lifted in January 2015. Maize imports in 2015/16 were significantly higher compared with previous years, due to the severe drought caused by El Niño that reduced maize output from around 1.4 million tonnes in 2014 to approximately 800 000 tonnes in 2015.²³ However, as regional trade partners are also struggling with maize shortfalls, Zimbabwe is spending nearly US\$200 million to import 700 000 tonnes of maize, mainly from South America.²⁴ Low regional maize supplies are also driving up prices, thus exacerbating food insecurity.

Striving for export development and diversification

The government has acknowledged the importance of trade to sustain economic growth in the National Trade Policy (2012–2016), which places particular emphasis on export diversification of both products and markets. The main policy objective is to increase export earnings by at least 10 percent annually by diversifying the export base, enhancing value addition of primary commodities, and expanding export markets with a focus on deeper regional integration. These objectives were confirmed in the 2013 ZimAsset. Despite these intentions, Zimbabwe continues to experience a negative trade balance that reflects, among other factors, the country's over-reliance on foreign goods, including grains and foodstuffs. The agricultural sector, once the main contributor to export earnings (together with the manufacturing sector), has been overtaken by the mining sector, which now accounts for more than 50 percent of the country's total exports.²⁵ In recent years, the continued depreciation of the South African rand against the US dollar has also contributed to undermining the competitiveness of Zimbabwean exports. Despite belonging to several preferential trade agreements, non-tariff barriers also remain a constraint on Zimbabwe's exports.²⁶

3. Emerging issues

Need for restoration of macroeconomic and financial stability

Zimbabwe is confronted with major economic and financial challenges, including a serious liquidity crunch and a high public debt burden (currently, the country's total debt stands at US\$8.4 billion, of which 85 percent is external debt).²⁷ The persistent trade deficit is also continuing to drain liquidity out of the country, which resulted in cash shortages during the second quarter of

2016. These structural weaknesses constrain the country's ability to generate the high and sustainable growth necessary to mitigate the debt distress. Despite the adoption of an arrears clearance plan in 2015 and some measures taken by the Reserve Bank of Zimbabwe to reduce the financial sector's vulnerability, international financial institutions have urged the government to undertake bold economic reforms that include lowering the public sector wage bill, reducing corruption, improving debt

23 FAO, GIEWS Country Brief – Zimbabwe, 08 January 2015 (available at www.fao.org/giews/countrybrief/country.jsp?code=ZWE).

24 ACAPS Briefing Note: El Niño in Southern Africa – Focus on Lesotho and Zimbabwe, 18 February 2016 (available at <http://reliefweb.int/sites/reliefweb.int/files/resources/e-el-nino-in-southern-africa---focus-on-lesotho-and-zimbabwe.pdf>).

25 WTO, Trade Policy Review – Zimbabwe, 14 September 2011 (available at www.wto.org/english/tratop_e/tptr_e/tp352_e.htm).

26 Newfarmer, R.S. and Pierola Castro, M.D. 2015. Trade in Zimbabwe: changing incentives to enhance competitiveness. Directions in development: Trade. Washington, DC, World Bank Group (available at <http://documents.worldbank.org/curated/en/2015/05/24539212/trade-zimbabwe-changing-incentives-enhance-competitiveness>).

27 United Nations Economic Commission for Africa, Country Profile – Zimbabwe, 2015 (available at www.uneca.org/publications/country-profiles)

management, and redirecting the economy toward private sector-led growth.²⁸ Such a comprehensive reform agenda will be critical to address the daunting economic challenges having an impact on Zimbabwe's food and nutrition security. Unless urgent steps are taken to restore macroeconomic and financial stability, there is a high risk that producers, traders and other actors along the value chain will face even more serious challenges in accessing inputs, output markets, finance and extension services.

Addressing major constraints in agriculture to unlock the country's potential

There is general consensus that Zimbabwe's grain input and output markets, particularly concerning maize, have not been operating at an optimal level over the last decade, even after the 2009 liberalization.²⁹ The input market is distorted as a result of various government and donor-funded schemes, although private dealers remain the main source of inputs for small-scale producers.³⁰ The output market is constrained by weak transportation networks in key agro-ecological areas (leading to low producer prices and high transaction costs), limited private investment in storage facilities and underutilization of public storage, as well as by the implementation of ad hoc marketing and trade policies. Considering these challenges and constraints, as well as the fact that the country's current economic recovery is still fragile, it is critical for the Government of Zimbabwe to

identify appropriate policies and investments aimed at stimulating sustainable agricultural growth and unlocking the country's agricultural potential.

Need for an integrated approach to disaster risk management

Similarly to most countries in Southern Africa, Zimbabwe is particularly vulnerable to climatic shocks such as extreme rainfall and drought, which represent a major threat to the livelihoods of vulnerable populations. Currently, it is one of the countries most affected by the 2015/16 El Niño weather phenomenon which has caused reduced rainfall and drought, severely affecting crop production, livestock and rural livelihoods. The humanitarian response put in place by the government and its development partners has included, among other interventions, food assistance to vulnerable people, emergency safe water supply, livestock destocking and grain imports. However, there is a growing consensus on the need to move from reactive to proactive approaches and methodologies in disaster risk management (DRM). Considering its vulnerability to climate-related shocks and willingness to comply with global commitments (e.g. the Sendai Framework), Zimbabwe needs to design an integrated DRM framework targeting particularly vulnerable sectors and country areas (i.e. the semi-arid regions), as well as increase the budget allocations to DRM across all sectors.

²⁸ For details, see www.imf.org/external/np/sec/pr/2016/pr16194.htm.

²⁹ Moyo, S., *Zimbabwe's Food Grain Economy (Draft)*, 6 February 2014.

³⁰ Ibid.

³¹ The Sendai Framework for Disaster Risk Reduction 2015–2030 is the successor instrument to the Hyogo Framework for Action (HFA) 2005–2015. It is a voluntary, non-binding agreement which recognizes that the state has the primary role of reducing disaster risk, but that responsibility should be shared with other stakeholders including local government, the private sector and others. The Sendai Framework represents one of the agreements of the post-2015 development agenda, with seven targets and four priorities for action. It was endorsed by the UN General Assembly following the third UN World Conference on Disaster Risk Reduction (WCDRR) in 2015.



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