



AGRICULTURE FOOD SYSTEMS AND RURAL TRANSFORMATION STRATEGY 2 (2026-2030)



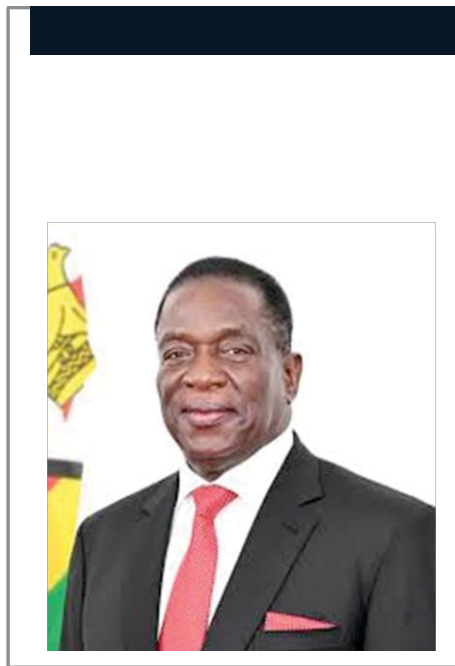
**MINISTRY OF LANDS, AGRICULTURE, FISHERIES, WATER
AND RURAL DEVELOPMENT**

Table of Contents

Table of Contents	1
FOREWORD	4
Acknowledgements	6
AFSRTS 2 Implementation	8
EXECUTIVE SUMMARY	10
1. INTRODUCTION AND CONTEXT	16
1.1. Agriculture Growth and Upper Middle Income Society	16
1.2. A Changing Cereals Basket	18
1.3. The Fertiliser Conundrum	20
1.4. Morphing Consumption Patterns Influence Imports	21
1.5. Rural Development 8.0.	22
2. AGRICULTURE SECTOR PERFORMANCE	28
3. CONTEXT OF FOOD SYSTEMS IN ZIMBABWE	47
3.1. Changing Demographic and Consumption Patterns	47
3.2. Sustained Economic Growth	48
3.3. Increasingly Urban Population	48
3.4. Nutrition	48
3.5. Sustainable Water Management	48
3.6. Climate Change and Biodiversity	49
3.7. Inclusivity, Gender and Youth	50
3.8. Sustainable Market Systems	50
3.9. Trade Development	51
3.10. Rural Development	51
3.11. Security of Tenure	52
3.12. Food Loss and Waste	52
3.13. Cost of Production	53
3.14. Healthy population through Improved WASH for increased Agricultural Production	53
4. LOOKING AHEAD	56
4.1. Food Security and Food Sovereignty	56
4.2. Nutrition Security	56
4.3. Improved livelihoods	57

4.4.	Agriculture-based and -led Economic Development	57
4.5.	Land and Tenure Security	58
5.	VISION, MISSION, PILLARS, BROAD OBJECTIVES VALUES	59
5.1.	Pillars and Strategic Objectives	59
5.2.	Values	61
5.3.	Specific Objectives	61
5.3.1.	Enabling Policy, Regulatory and Coordination Environment	61
5.3.2.	Sustainable Production and Productivity	62
5.3.3.	Research, Innovation, Technology and Modernisation.....	64
5.3.4.	Climate Adaptation, Mitigation and Resilience Building	65
5.3.5.	Rural Industrialisation and Rural Development.....	66
5.3.6.	Investment and Finance	68
5.3.7.	Markets and Trade Development	69
5.3.8.	Enabling Infrastructure Development, Rehabilitation and Management	70
5.3.9.	Land and Tenure Security.....	70
5.3.10.	Building Internal Capacity to Deliver Transformation.....	71
5.4.	Conceptual framework	72
6.	SECTOR GROWTH PROJECTIONS	73
6.1.	Gross Value of Agriculture Production	73
6.2.	Projected Consumption Patterns 2026-2030	74
6.3.	Gross Value of Agricultural Exports	79
7.	GOVERNANCE AND INSTITUTIONAL ARRANGEMENTS	82
7.1.	Governance and Implementation Framework	82
7.2.	The Role of State-Owned Enterprises and Parastatals in Agriculture Transformation	83
7.2.2.	Agricultural Marketing Authority.....	84
7.2.3.	Agricultural and Rural Development Authority	84
7.2.4.	Agricultural Research Council	85
7.2.5.	Cold Storage Commission.....	85
7.2.6.	Cotton Company of Zimbabwe	85
7.2.7.	Grain Marketing Board.....	86
7.2.8.	Pig Industry Board.....	86
7.2.9.	Tobacco Industry and Marketing Board.....	86

7.2.10.	Tobacco Research Board.....	87
7.2.11.	Silo Food Industries	88
7.2.12.	Zimbabwe National Water Authority.....	88
7.2.13.	Zimbabwe Commodity Exchange.....	88
7.2.14.	Farmers Development Trust	88
7.2.15.	Zimbabwe Land Commission	89
7.3.	Agriculture as a Business at Every Level and Every Scale	89
7.4.	Stakeholder Relations.....	90
7.5.	Resource Mobilization Strategy.....	90



Zimbabwe's transformation from a low-income to an inclusive, diverse, modern and prosperous upper middle-income economy is underpinned by agriculture, as our economy is agro-based. In August 2020, I launched the ambitious "Agriculture and Food Systems Transformation Strategy", later named the "Agriculture, Food Systems and Rural Transformation Strategy" to provide, under the National Development Strategy 1, the sector roadmap for the sustainable, inclusive and climate-smart transformation of the sector from a USD 5.2 billion industry to a USD 8.2 billion industry by 2025. I commend the Ministry of Lands, Agriculture, Fisheries, Water and Rural Development for the accelerated implementation of this Strategy which has seen the sector grow to a USD 10.3 billion industry by 2025, despite the negative impact of the worst drought in over forty years in the 2023/2024 season.

It has become necessary to craft this "Agriculture Food Systems and Rural Transformation Strategy 2: 2026-2030 (AFSRTS 2: 2026-2030), under the National Development Strategy (NDS 2), on our transformative journey towards Vision 2030. This AFSRTS2 emphasises the resilience of the agricultural sector, based on the principles of climate-proofed agriculture, to ensure perennial food security, away from the episodic and weather-determined food security escapades of the past. This will assure the nation of food sovereignty. Concurrent with this effort, there will be improved nutrition for communities through a food systems approach to agricultural production. Resultantly, there will be better livelihoods for communities, and increased

contribution of agriculture to economic development. These developments will be buttressed by a robust and secure land tenure and administration system. The historic land reform programme is irreversible and is being entrenched to increase production and productivity through the issuance of bankable and transferable title deeds.

I note that various regional and continental agricultural commitments have been domesticated through this AFSRTS 2, in particular, the Kampala Declaration's Comprehensive Africa Agriculture Development Programme and its 10-year Strategy and Action Plan adopted in January 2025 by the African Union Council of Ministers, which is the successor to the Malabo Declaration of 2014.

A whole of government approach, and our mantra "*Nyika inovakwa nevene vayo/Ilizwe lakhiwa ngabanikazi balo*", should motivate and guide the sector to accelerate implementation of this Strategy for the attainment of Vision 2030.



His Excellency Dr. E.D. Mnangagwa

PRESIDENT OF THE REPUBLIC OF ZIMBABWE

Acknowledgements



This AFSRTS2 is a product of wide stakeholder consultations, and input and contributions by a diverse cross-section of society – policymakers, value chain specialists, farmers, input suppliers, financiers, government ministries, departments and agencies, development partners and many more - a testament to

the proprietary, participatory, inclusive and whole of sector approach adopted since the advent of the Second Republic in 2017.

The AFSRTS2 is, for convenience, arranged around ten Pillars: (1) Enabling Policy, Regulatory and Coordination Environment; (2) Sustainable Production and Productivity; (3) Research, Innovation, Technology and Modernization; (4) Climate Adaptation, Mitigation and Resilience Building; (5) Rural Industrialisation and Rural Development; (6) Investment and Finance; (7) Markets and Trade Development; (8) Enabling Infrastructure Development, Rehabilitation and Management (9) Land and Security of Tenure and (10) Building Internal Capacity to Deliver Transformation.

The AFSRTS2 has adopted “a food systems approach” – a value stream and value creation continuum, emphasising a holistic approach to development, including the associated causal, co-factor and multiplier enablers – indicating the strong and pivotal “agricultural development-industrialisation-economic development-Vision 2030 nexus”.

May I take this opportunity to thank all contributors, individually and collectively - but especially the private sector value chain champions who led the strategy-making process – for making this AFSRTS2 a dynamic living reality.

May the enthusiasm, unity and whole of sector approach exhibited during the Strategy-making process be continuously manifested in the implementation of this strategy. Working together we can do much more!

“Mvura ngainaye, minda ipe mbesa/Izulu kaline izilimo zande”.



Hon Dr Anxious Jongwe Masuka (MP)

**MINISTER OF LANDS, AGRICULTURE, FISHERIES, WATER AND RURAL
DEVELOPMENT**



The Agriculture Food Systems and Rural Transformation Strategy 2 is a product of nation-wide stakeholder policy dialogue embracing the food systems approach. The strategy plays a catalytic role in the agri-food systems transformation for the attainment of Vision 2030. AFSRTS2 is informed by the value chain approach, where Ministry identified value chain champions to lead the value chain analysis, whose findings were validated by stakeholders through policy dialogues, key informant interviews and validation

workshops. The development process got strategic guidance at all levels within the Ministry of Lands, Agriculture, Fisheries, Water and Rural Development (MLAFWRD).

As Lessons from the Agriculture Food Systems and Rural Transformation Strategy 1, the influence of a market-led and oriented approach has also informed the interventions within the strategy. The Agricultural Development Pentagon Approach embraced during consultations is fully integrated as part of the planned operationalisation of the Strategy, thus acknowledging that the transformation of the agriculture sector requires coordinated support to research, finance, marketing, education and extension; strong and connecting institutions and actors (private sector, development partners, civil society and farmer organisations) that leverage collective resources. Appreciation, therefore, goes to all stakeholders throughout all provinces for their active participation during policy dialogues which culminated into valuable input for the development of the Strategy. This work was made

possible through the collaborative work of the MLAFWRD and development partners including FAO, CTDO and IFAD.

Zimbabwe's agricultural transformation hinges on moving from a government-centric delivery model to a **multi-stakeholder partnership**. The policy framework provides a solid foundation, but its success is inextricably linked to the effectiveness of the implementation plan. This requires:

- **Empowering Local Structures:** Strengthening district/provincial taskforces and farmer organizations.
- **Transparent and Accountable Governance:** Clear roles, shared monitoring and evaluation, and feedback loops.
- **Sustainable Financing:** Innovative blended finance models, leveraging climate funds, and de-risking private investment.
- **Prioritizing Inclusion:** Ensuring women, youth, and vulnerable groups have voice and access in *all* programmes.
- **Adaptive Management:** Using data (crop assessments, early warning) to adjust programmes rapidly in response to shocks.

By nurturing this collaborative ecosystem, the strategy will unlock the immense potential of the agriculture sector, ensuring food security, driving broad-based economic growth, and building resilience against a changing climate.



Prof. dr. O. Jiri

SECRETARY FOR LANDS, AGRICULTURE, FISHERIES, WATER AND RURAL DEVELOPMENT

EXECUTIVE SUMMARY

The right to food and water (Section 77) and right to agricultural land (Section 72) are fundamental rights defined in the Constitution of the Republic of Zimbabwe Amendment No 20 of 2013. The constitutional, policy, legal and strategic framework for the right to land, food, water and decent sanitation have been clearly articulated since the advent of the Second Republic in 2017.

The Agriculture, Food Systems and Rural Transformation Strategy 2: 2026-2030 (AFSRTS2: 2026-2030) is the country's new agriculture roadmap, building on the success of the AFSRTS:2020 - 2025. It is the sector implementation plan of the National Development Strategy 2 (NDS2) for the attainment of Vision 2030. A dual approach to financing agriculture is still necessary. This is achieved through a developmental state philosophy – with the state actively intervening to develop subsistence communities and uplifting them out of poverty – and the state concurrently providing an enabling environment for strong private sector participation to facilitate and catalyse investment for sustained increases in agricultural production and productivity. Using a food systems approach and value chain perspective, the AFSRTS2 is designed around five strategic impact areas in line with NDS 2. These are:

- 1) Food Security and Food Sovereignty;
- 2) Nutrition Security;
- 3) Improved livelihoods;
- 4) Agriculture-based and led economic growth and;
- 5) Land and Tenure Security.

The Ministry's mandate transcends economic, social and peace and security sub sectors of the country. Under thematic area five, appropriately named "Agriculture, Food, Climate and Environment" the Ministry is obligated to achieve the following outcomes:

1. Food Security improvement from 85 % in 2025 to 90% in 2030 and
2. Stunting in children to reduce from 24% in 2025 to 20% in 2030;

The Ministry's targets are narrowly defined in the National Development Strategy 2 (NDS 2). A broader approach has been adopted in this AFSRTS 2 to fully reflect the span of the Ministry. The Zimbabwe Livelihoods Assessments Report in 2025 indicates improvements across all food security and nutrition parameters. Food security increased from 44% in 2020 to 85% in 2025 in rural and urban areas. Access to water increased from 77% in 2020 to 81% in 2025. Access to basic sanitation hygiene services increased from 51% in 2020 to 55% in 2025. Stunting decreased from 26.7% in 2020 to 23.8% in 2025.

To achieve the envisioned NDS 2 targets and have wider socio-economic impact, AFSRTS2 is structured around ten Pillars thus:

- i. Enabling Policy, Regulatory and Coordination Environment;
- ii. Sustainable Production and Productivity;
- iii. Research, Innovation, Technology and Modernization;
- iv. Climate Adaptation, Mitigation and Resilience Building;
- v. Rural Industrialisation and Rural Development;
- vi. Investment and Finance;
- vii. Markets and Trade Development;
- viii. Enabling Infrastructure Development, Rehabilitation and Management
- ix. Land and Tenure Security and
- x. Building Internal Capacity to Deliver Transformation.

These Pillars have, each, one anchor broad strategic objective, and several specific objectives. The general broad strategic objectives are:

- i. To create and sustain an environment for inclusive, transparent, predictable, pro-growth adaptive policy, regulatory and coordination mechanisms for agri-food systems transformation;
- ii. To increase crop, livestock and fisheries production and productivity for sustained national food security, increased nutrition security, attainment of food sovereignty, while building a USD 15.8 billion agriculture industry;
- iii. To build a modern, technology- research-and innovation-driven agriculture sector for increased productivity, and improved viability and profitability at every scale, from village to estate;
- iv. To develop a resilient agriculture sector capable of adapting to increasing climate variability and shocks;
- v. To accelerate agricultural development for catalysing industrialisation and economic development;
- vi. To mobilise public, private and development sector finance and investment for agri-food systems transformation and development;
- vii. To enhance market access and promote domestic and international trade for sustained transformation of sustainable and inclusive value chains.
- viii. To establish modern production, storage, logistics and market infrastructure to support agricultural transformation;
- ix. To enhance land administration and security of tenure for improved agricultural production and economic development, peace and territorial integrity.

- x. To develop dynamic human resources, and robust institutions, infrastructure and systems, to deliver agriculture and food systems transformation.

A value system has been cultivated and will be entrenched within the agricultural sector guided by the following values:

- i. Innovative-continuous creativity-led and creativity-driven improvement, from ideation to cost-efficient implementation of programmes and projects;
- ii. Collaborative-promoting inclusive stakeholder cooperation to facilitate increased production and productivity.
- iii. Reliable-nurturing a culture of trust, dependability, endurance and predictability for accelerated transformation of the agriculture sector.

Food crop production will increase by 90% from 3.2 million MT in 2024/2025 to 6.1 million MT by 2030/2031. Horticulture Production will increase by 70% from 7.6 million MT in 2025 to 12.9 million MT. The National Cattle herd will increase by 15.8% from 5.7 million in 2024/2025 to 6.6 million by 2030/2031. Broiler meat production will increase by 75% from 205 880 MT in 2024/2025 to 362 000MT by 2030/31. Indigenous chicken meat production will increase by 31% from 15 545 MT in 2024/2025 to 20 500 MT by 2030/2031. Milk Production will increase by 75% from 114 million litres to 200 million litres by 2030/2031. Fisheries production will increase by 14% from 31,296 MT in 2024/2025 to 35,697 by 2030/2031. The Gross Value of agriculture will increase from 10.3 billion in 2024/2025 to 15.8 billion by 2030/2031 a 53% growth.

Zimbabwe seeks to be a “food-, feed-, bio-oils- and bio-fuels secure” agro-industrial hub by 2030, away from the “food basket status” mindset of the past. By dint of geography, being located in the southern Africa region, relatively

better transport and logistics networks, a diverse manufacturing industry and a willing talent base, Zimbabwe should emerge as an enviable modern agro-industrial hub with magnetic effects on regional agro-value chains development.

For the success of AFSRTS2, an agriculture as a business mindset will be cultivated, at all levels, leaving no one and no place behind, and in every value chain. The delivery of the sectors' ambitious targets under AFSRTS 2 will be spearheaded, coordinated and driven by the MLAFWRD. A talent pool of sufficiently trained and motivated specialists will daily deliver the AFSRTS2 at the highest level. Adaptive, creative and innovative staff with sufficient perseverance and resilience and courage and fortitude will drive change needed to transform agriculture at both pace and scale for the attainment of Vision 2030.

Names and medals matter - as symbols of recognition. The change of nomenclature from the AGRITEX Extension Worker to Agricultural Business Advisor, recently adopted by the MLAFWRD, is synonymous with agriculture as a business at every level – away from growing maize and selling surplus production, to growing “maize for sale to me and the world” – an elimination of the terminology of “cash or staple crops”. Cereals crops such as millets are commercial crops – to engage in growing cereals as a business and NOT for subsistence purposes – that is the business of producing to feed ourselves and others – that production at every level and every scale is an economic activity. The “*Kuinda Kumunda - Kuinda Kubasa*” philosophy will be the guiding heritage-based conceptual and transformational framework of AFSRTS2. Talent and talent management are key for this transformation of the mindset, and for transformation in practice to take hold.

All farmers are in business, is the new paradigm, as farming is a business. The AFSRTS2 should thus accelerate the transformation of all A2 farmers, some 23 500 farmers, to corporates. The 360 000 A1 farmers should be micro-to small enterprises, together with communal farmers. This is our national challenge.

The Ministry of Lands, Agriculture, Fisheries, Water and Rural Development is the lead Ministry in the implementation of the AFSRTS2, but many MDAs are partners and enablers for the successful implementation of the strategy. This necessitates a “whole of government” and indeed a “whole of society” approach to the implementation of the AFSRTS 2. It is in this context that SOES have been included and their roles highlighted for the success of the implementation of AFSRTS 2.

At the end of the Plan period in 2030, agriculture will emerge as a strong vibrant and anchor sector for the sustained transformation of livelihoods, both rural and urban, for accelerated socio-economic transformation of the country, catalysing the attainment of Vision 2030 of becoming a prosperous and empowered upper middle-income society.

1. INTRODUCTION AND CONTEXT

1.1. Agriculture Growth and Upper Middle Income Society

Zimbabwe is on the path to transitioning from a lower middle-income to an upper middle-income society. With a GDP of USD 45.7 billion in 2024 and a population of 15.1 million, Zimbabwe is well on its way to becoming an upper income society by 2030, but inequalities prevail. Key to eliminating these inequalities, and enabling this transition, is the agriculture sector, as over 70% of the population, including the 62% in rural areas, are daily involved in agriculture – largely as subsistence agriculture. With 60% of the rural population involved in agriculture being women, agriculture's inclusivity cannot be over-emphasised.

The implementation of the Agriculture, Food Systems and Rural Transformation Strategy 1 (AFSRTS1) has seen Zimbabwe's agriculture sector recording significant growth over the past five years. The sector's gross value has increased from USD 5.2 billion in 2019 to USD10.3 billion in 2024.

The agricultural sector grew by 4.1% in 2020, 17.5% in 2021, 6.2% in 2022 and 6.3% in 2023. Despite this growth, in 2024 the sector experienced negative growth of 18% attributed to the El-Nino-induced drought. In 2025 the projected growth is 21 %.

The agriculture sector has experienced significant growth and setbacks. The growth was mainly attributed to policy interventions such as the Agriculture and Food Systems Transformation Strategy aimed at boosting production, food security, and rural industrialisation. Key gains include a record wheat production of 563 961MT in 2024 from 94 685 MT in 2019 against a national annual requirement of 360 000MT. The country experienced a general growth in cereal production over the years, achieving a high of 2,9 million MT in the

2024/25 season (being maize 2,293,556 MT and Traditional Grains 634,650 MT). The area under irrigation increased from 151 000 ha in 2019 to 221 000 ha in 2024, a 46.4% growth. The target is to develop 496 000ha. Milk production increased from 76.7 million litres in 2019 to 115 million litres in 2024, a 49.9% growth against an annual requirement of 120 million litres. Beef production increased from 49 000 MT in 2021 to 95 000 MT in 2024, being an increase of 93.9%.

The strategic reorientation of the Ministry's Parastatals resulted in the Agricultural and Rural Development Authority (ARDA), being designated "the food security agent of the nation", whilst the Agricultural Finance Cooperation was resuscitated, and its mandate broadened to include agricultural development lending, commercial banking, insurance and tractor leasing services. All state enterprises and mandates were aligned with the AFSRTS 1. Significantly, community resilience-building measures, in the face of climate change, were introduced under the aegis of the "Rural Development 8.0 Paradigm" targeting villages, schools and youths, leaving no one and no place behind.

Strategy implementation setbacks were attributable to climate shocks, geopolitically-induced market and supply chain distortions, macro-economic instability from elevated inflation, and a COVID-19 global pandemic. Climate shocks exacerbated feed and fodder shortages, with production of crops such as soyabean, sunflower and cotton failing to meet livestock nutritional and human oilseeds requirements. While the strategy laid a foundation for long-term transformation, sustained investment in irrigation, and climate adaptation, and enhanced market access remain suboptimal, and yet are critical to achieving the USD15.8 billion gross value envisioned by 2030. The sector's sustained transformation is essential for the achievement of the envisaged upper middle-income society by 2030.

Despite significant and commendable growth, Zimbabwe's agriculture sector continues to face fundamental challenges which include, increasing incidences of droughts, low agricultural productivity, low viability, perennial under-funding due to the limited fiscal space, threats from transboundary pests, weak markets, and unavailability of appropriately tenured private investment.

Agriculture contributes between 9-12% of total GDP, 60-70% employment and 30-40% of the country's exports. Agriculture supplies upwards of 60% of manufacturing industry raw material requirements, while purchasing over 40% of industry manufactured products.

The AFSRTS 2 will accelerate the transformation of Zimbabwe's agricultural sector through the creation and sustenance of efficient, productive and viable climate-smart value chains in the crops, horticulture, livestock and fisheries sectors. The strategy is anchored on food security and sovereignty, nutrition security, improved livelihoods and agriculture-based and-led economic development, buttressed by a secure land tenure and administration system. AFSRTS-2 adopts a holistic food systems approach, a value chain perspective, and projects a USD15.8 billion agriculture industry, based on gross value of production, by 2030. With an inclusivity focus, both women and youth, will be mainstreamed into the business of agriculture.

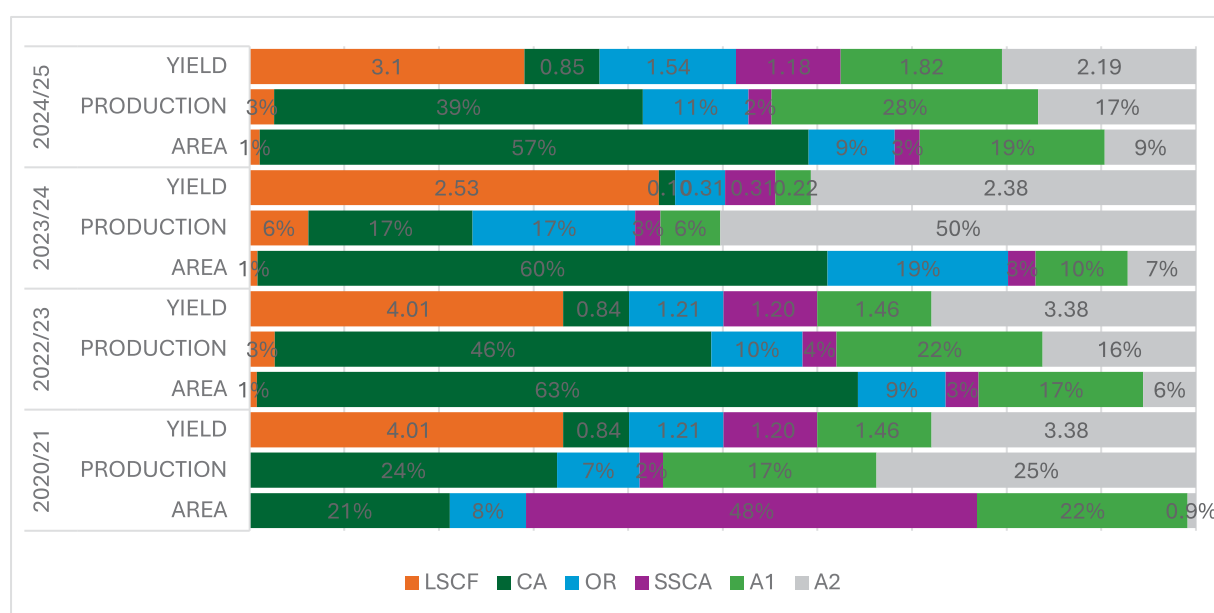
1.2. A Changing Cereals Basket

Cereal production dominates Zimbabwe's agricultural landscape, with maize serving as the primary staple crop and supplying over 50% of national calorie intake. The significance of maize extends beyond human consumption to animal feed, underpinning livestock industries such as poultry, piggery and cattle production. Maize's centrality intersects current food sovereignty debates, where colonial legacies favoured maize over traditional grains

(sorghum, millets), traditional vegetables (okra), and traditional tubers (sweet potatoes). In terms of emerging tastes and preferences, there is a slant towards preferences for exotic tubers (Irish potatoes) and cereals (padi rice). The “maize-centric” food security approach is being challenged by the Second Republic’s insistence on agro-ecological tailoring of crops, based on soils and fertility management and science-based management of crops at every level. Consequently, the cereals food security basket now includes maize, traditional grains, wheat and rice.

The focus is on increasing crop yield, through the sustainable intensive agriculture model for smallholder farmers (Figure 1.1).

Figure 1.1 Maize production by farming sector



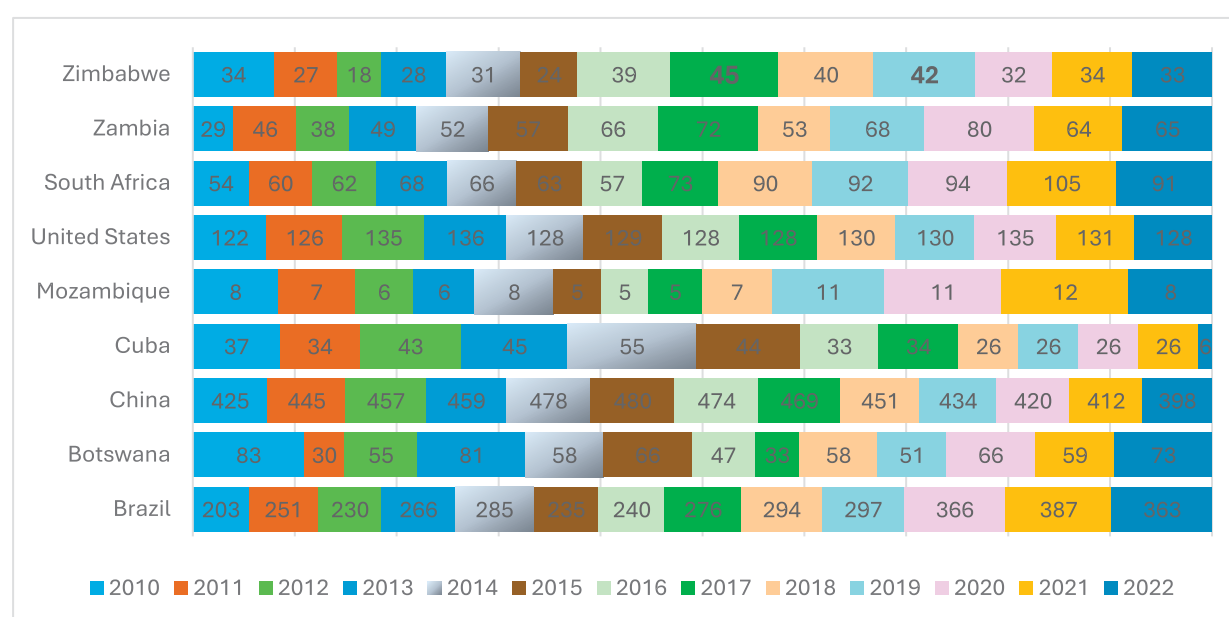
While the contribution of the communal area in hectareage is significant, the disparity in production and yield levels in comparison to A1, A2, SSCA and LSCF is high. LSCF contributes a maximum of 1% in area planted, and 6% in total output, as the LSCF records yield levels of 4 t/ha on average. Crop yields in Sub-Saharan Africa (SSA) are generally very low. For example, the average cereal yield in SSA is 1.266 t/ha while the global average is 3.745 t/ha.

There are several factors contributing to this, however low soil fertility stands out and the increased use of fertilizers, and attention to matters of soil health, could strongly increase crop yields. The average application rate of inorganic fertilizer on arable land in Sub-Saharan Africa is 33 kg/ha, much lower than the 141 kg/ha in South Asia, 154 kg/ha in the European Union, 175kg/ha in South America, and 302 kg/ha in East Asia.

1.3. The Fertiliser Conundrum

The World Bank (2025) fertilizer consumption records postulates that USA averaged 120–135 kg/ha annually, while China, the world's largest fertilizer consumer, averaged 350-480kg/ha annually. In contrast, Sub-Saharan Africa (SSA) averaged lower with South Africa, Zambia and Botswana recording 105 kg/ha, 80 kg/ha and 73kg/ha, respectively, between 2010 and 2022. During the same period, Zimbabwe recorded 45kg/ha at its peak in 2017, with usage dwindling to 33kg/ha in 2022 (Figure 1.2)

Figure 1.2 Comparative analysis for fertiliser utilisation for Zimbabwe in Sub Saharan Africa, China and USA: 2010-2022



Zimbabwe's fertiliser consumption levels increased in 2017-2019, attributed to the government input support programme. However, fertiliser consumption decreased during the period 2020-2022 attributed to the Pfumvudza/Intwasa programme which encouraged precision farming resulting in a small area and high productivity.

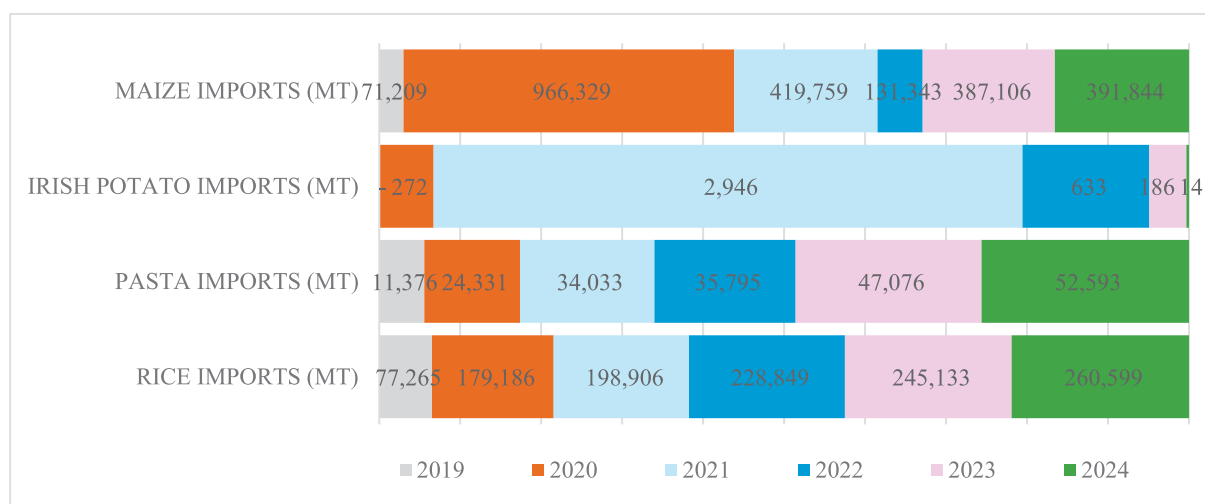
Zimbabwe's fertilizer consumption is heavily constrained by import dependency, critically impacting cereal production. High transport costs have exacerbated prices, with urea reaching \$1.45/kg during 2022. In comparison, average prices of fertilizer range from 0.50 c/kg in China to 0.80 c/kg in USA, while SSA prices vary according to proximity to the coast, among other factors. Landlocked countries (Zambia, Botswana, Zimbabwe) face 20–50% higher prices than coastal peers.

Bridging the fertiliser consumption gap requires hyper-localized price management, scaled domestic production, crowding in private sector investment in local fertilizer production, usage of nano technology in fertilizer production, and integration of both organic and inorganic fertilizer sources. The AFSRTS2 is premised on productivity increases. Localisation of fertiliser production is key to increasing production and productivity. Local production of fertilizer will increase its usage, access, affordability and availability, making agriculture viable, profitable and sustainable.

1.4. Morphing Consumption Patterns Influence Imports

Zimbabwe is currently witnessing a shift in consumption patterns from maize to rice, pasta and Irish potatoes see page 21 on previous page. With negligible local production of rice, imports have steeply increased. AFSRTS 2 seeks to increase local production of the imported foods, to reduce the import bill.

Figure 1.3. Import patterns of selected commodities



The increasing prominence of rice, pasta, traditional grains, and potatoes signals a move away from over-reliance on a single staple, which is likely to intensify as consumption patterns continue to morph, as consumer awareness of health, nutrition, environmental impact and sustainability continue to grow. There is a growing awareness of the nutritional benefits of traditional grains compared to maize. During the AFSRTS 2 implementation period it is expected that demand for maize will stabilise and even begin to decline.

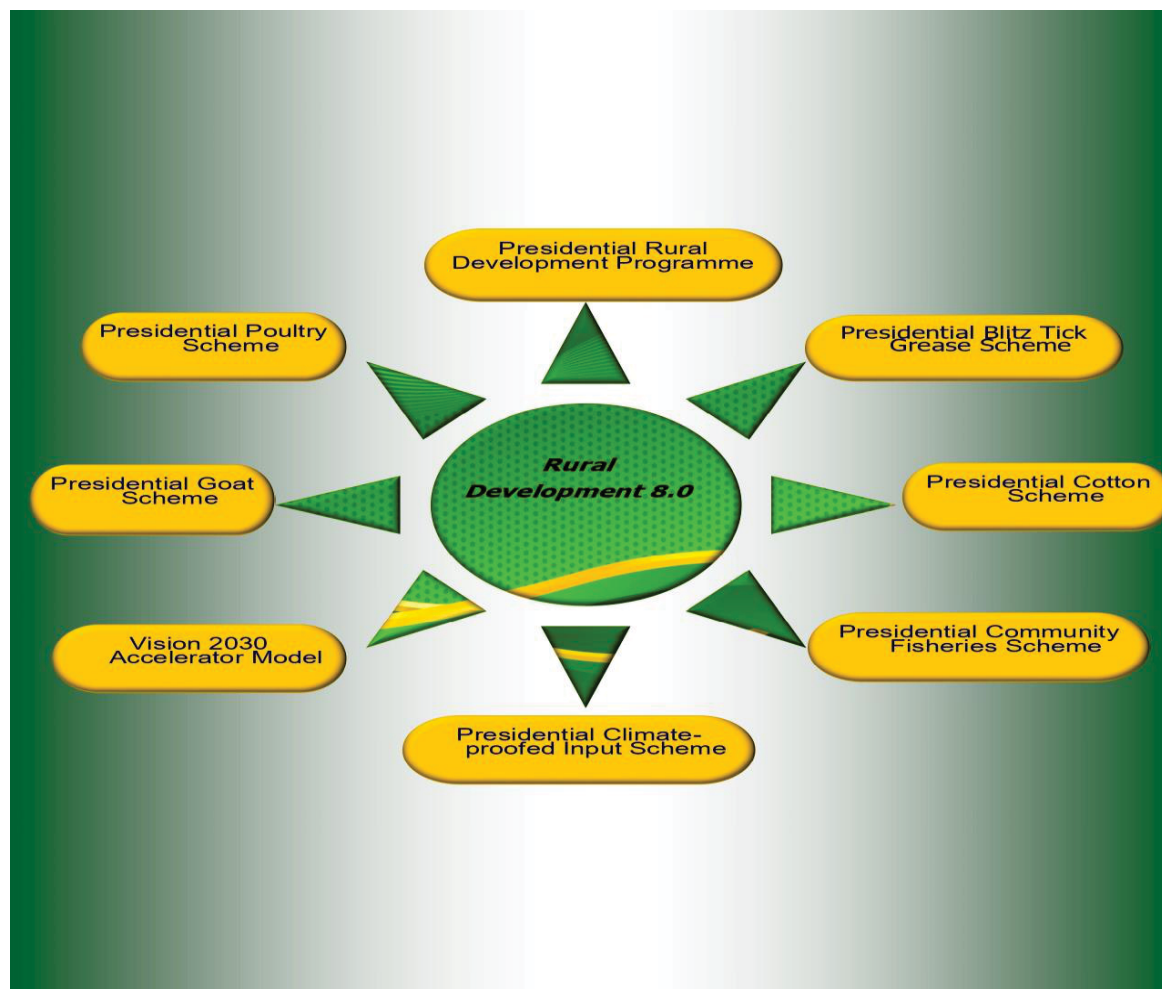
1.5. Rural Development 8.0.

Rural Development 8.0 initiatives aim to transform the rural economy through agricultural development, industrialization, and infrastructure improvement. This in turn will result in the transformation of the rural economy through improved food security and nutrition, and better incomes and livelihoods. This will facilitate the attainment of the national aspiration of a prosperous and empowered upper middle-income society by 2030, leaving no one and no place behind. The rural development 8.0 comprises of the following components:

- i. Presidential Climate Proofed Input Scheme
- ii. Presidential Cotton scheme

- iii. Presidential Rural Development Programme
- iv. Presidential Household Tick Management Scheme
- v. Presidential Community Fisheries Scheme
- vi. Presidential Goat Scheme
- vii. Presidential Poultry Scheme
- viii. Presidential Vision 2030 Accelerator Model

Figure 1.1. Rural Development 8.0 Conceptual Framework



The Presidential Climate-Proofed Input scheme is aimed at promoting climate-resilient agriculture in Zimbabwe. The scheme was introduced as a measure to address the problem of low production and productivity as a result of climate change shocks. The scheme provides farmers with input packages

comprising of seed for three plots, fertilizer both basal and top dressing, fall armyworm chemicals, lime, hydrogel for moisture conservation and herbicides. The scheme targets 3 million beneficiaries in the rural areas and 500,000 beneficiaries in the urban and peri-urban (transient urban farming). Under this input support scheme, the crops targeted include maize, sorghum, pearl millet, soya bean, sunflower, African pea, ground nuts and sugar beans. The scheme is promoting agro-ecological tailoring where crop inputs are distributed based on the agro-ecological potential.

Presidential Cotton Scheme

The Presidential Cotton Scheme is aimed at promoting cotton production in Zimbabwe. The programme provides farmers with support, including inputs, training and market access to enhance cotton productivity and improve the livelihoods of rural communities. This programme is targeting about 520,000 households in cotton growing areas such as Gokwe, Muzarabani, Chipinge South, Chiredzi, Mwenezi with cotton seed, chemicals and fertilizers.

Presidential Rural Development Programme

The Presidential Rural Development Programme is a comprehensive initiative aimed at transforming Zimbabwe's rural landscape through economic empowerment and sustainable development. This pursues accelerating the attainment of Vision 2030, anchored on the provision of water as a constitutional right and an economic enabler. The Government, through the Zimbabwe National Water Authority (ZINWA) and RIDA intends to drill and equip a total of 35,000 boreholes in 35 000 villages, 10,000 boreholes in 10 000 schools, 4800 boreholes in 2400 wards for youths, and 43 vocational training centre boreholes, by 2030. The establishment Village Business Units (VBUs), School Business Units (SBUs), Youth Business Units (YBUs) and

Vocational Training Centre Business Units (VTCBUs) is part of the rural development programme aimed at establishing a solar-enabled, one hectare drip irrigated plot, with two fish ponds, each with 2000 fingerlings, a water trough for cattle and a water point for portable and safe drinking water.

The existing robust network of approximately 41,000 functional community boreholes drilled in Zimbabwe will be capacity-tested. Prolific boreholes will be candidates for VBUs, SBUs, YBUs and VTCBUs. Rural Development 8.0 goes beyond agricultural output, as these interventions are for poverty reduction, job creation, and rural-urban migration mitigation.

This programme represents a transformative model for the country turning water access, aggregation, value addition and beneficiation into economic sovereignty. With sustained investment and community ownership, Zimbabwe's 35,000 VBUs will catalyze a rural renaissance, lifting millions out of poverty while fueling national GDP growth.

Presidential Household Tick Management Scheme

The Presidential Blitz Tick Grease Scheme is aimed at controlling tick-borne diseases in livestock, particularly in communal and small-scale farming sectors through provision of tick grease to one million cattle-owning households, each receiving 1kg to improve animal health and productivity. The scheme came as a result of the outbreak of January Disease (theileriosis) which resulted in farmers losing more than 500 000 animals to January Disease. Veterinary District officers coordinate transportation of tick grease to accessible locations, including dip tanks, ward centres, and Animal Health Management Centres (AHMCs). Notably, traditional leaders, Members of Parliament, and Councillors also contribute by assisting in the distribution of tick grease to communities. Furthermore, some farmers have taken the

initiative to organize their own transportation, demonstrating the high value they place on this critical resource for tick control and livestock protection.

Presidential Community Fisheries Scheme

The Presidential Community Fisheries Scheme is aimed at promoting fish farming and aquaculture in rural communities through provision of training, inputs and support to communities to establish and manage fishponds to enhance food security and income generation. Fish farming is a growing industry in Zimbabwe, with potential for economic growth and poverty reduction. The scheme has three components thus: (1) stocking of VBUs, SBUs, YBUs and VTCBUs (2) stocking of dams for rod fishing and (3) commercial cage fishing. Five government Tilapia breeding centres are currently under construction to complement private sector efforts to increase fingerling production from the current 12 525 000 fingerlings per year against a desired target of 30 million.

Presidential Poultry Scheme

The Presidential Poultry Scheme is an initiative which seeks to increase organic rural poultry production for improved household nutrition and household incomes, while climate-proofing agriculture. About 3 million beneficiary rural households will receive 10 free range chicken (road runners) and training on production. The Agricultural Marketing Authority and Zim-Trade are exploring foreign markets for this rural poultry scheme.

Presidential Goat Scheme

The Presidential Goat Scheme is aimed at promoting goat production and improving the livelihoods of rural communities. Goat production has been identified as one of the key climate-proofed livestock production systems for enhancing resilience against climate shocks. Under the scheme, a total of 35 000 bucks (he-goats), one in each village, and one “she-goat” for each of the

1.8 million households will be distributed across the country. All the 35 000 bucks will be electronically tagged to trace their movement and ensure accountability.

Presidential Vision 2030 Accelerator Model

The Vision 2030 Accelerator Model is a strategic initiative aimed at fast-tracking the achievement of Zimbabwe's development goals, focused at making irrigation schemes viable, profitable and sustainable Irrigation Scheme Business Units (ISBUs). This programme focuses on revitalizing existing irrigation infrastructure to enhance agricultural productivity, improve food security, and increase income for farmers. Some 341 ISBUs on 19 000 Ha have been established against a target of 460, on 26 000 ha.

Additionally, Infrastructure 6.0 adopted for the “dam is an economy model” will be financed by both the public and private sectors. Infrastructure 6.0 focuses on:

- i. Dam Construction
- ii. Electricity generation
- iii. Irrigation Development
- iv. Portable Water Supply
- v. Fisheries development and
- vi. Wastewater Management

In the public sector investment, the 12 dams projects will leverage various aspects of RD8.0, to catapult communities out of poverty for rural transformation and the attainment of Vision 2030. ARDA, through a corporate crowd-funding model, will operate a value chain development company benefiting land seekers, both local and abroad, some 270 000 initially. Under the private sector model, entities will be given “lease arrangements for land

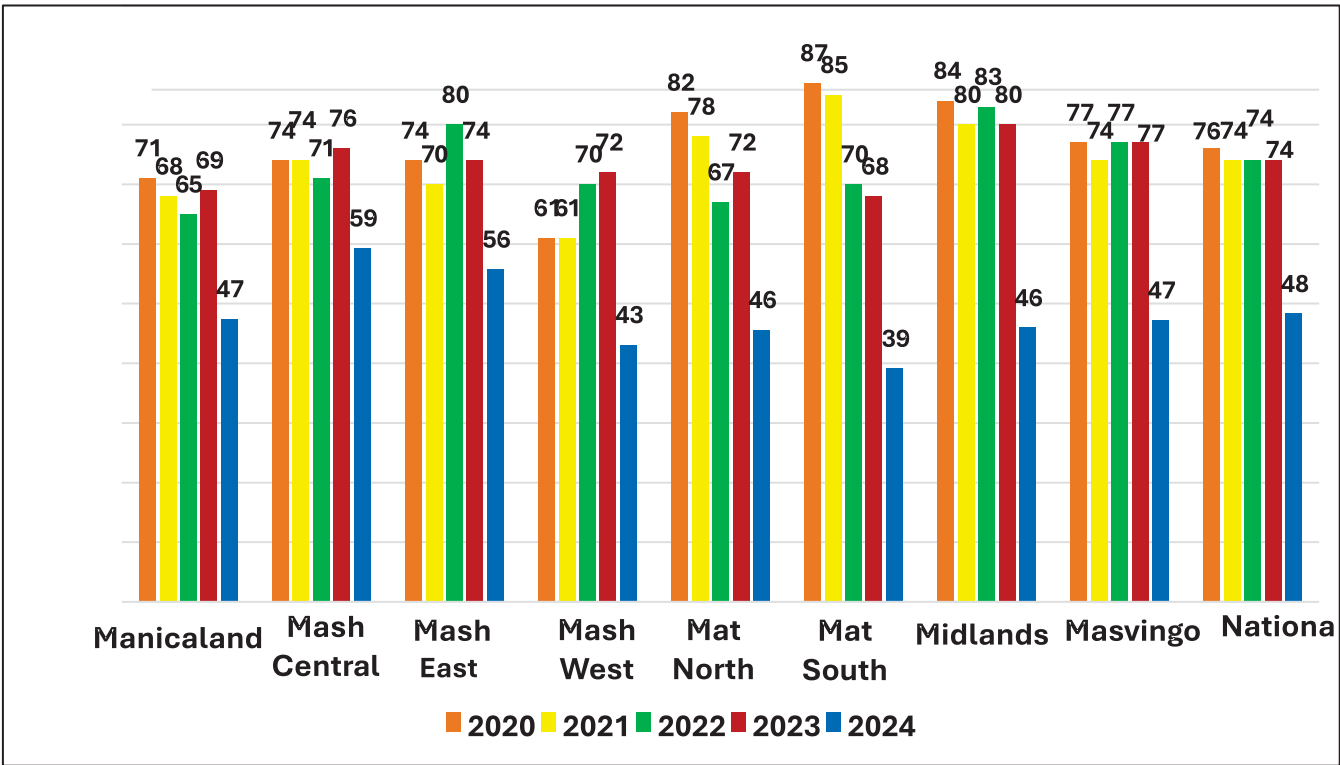
around dams” to develop Infrastructure 6.0 projects, benefitting communities but ensuring descend returns for capital invested.

2. AGRICULTURE SECTOR PERFORMANCE

2.1. Food Security

The country’s food security situation has improved-from the high insecurity levels of 56% in 2020, 27% in 2021, 38% in 2022 and 26% in 2023. However, the ravaging effects of El-Nino induced drought experienced in 2024 resulted in food insecurity levels rising to 57% during the peak hunger period (January-March).

Figure 2.1. Percentage of Households which Received Any Form of Support



During the El-Nino induced drought, the government adopted the wheat-based food security strategy, opened imports for maize and implemented the food deficit mitigation strategy and several resilience building measures.

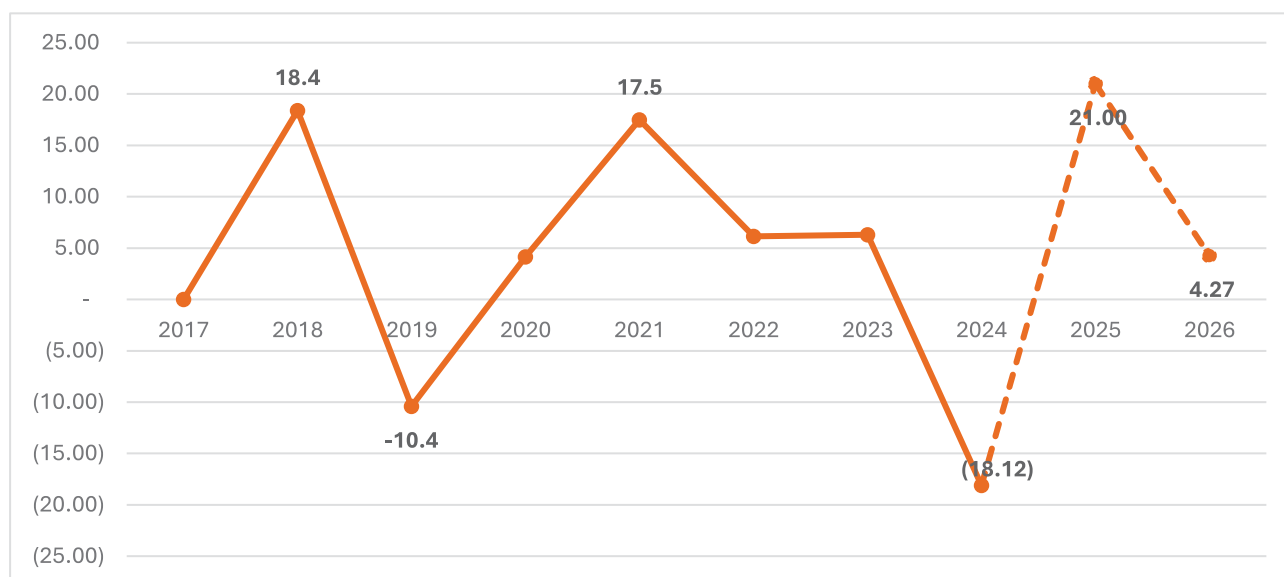
Resultantly, Zimbabwe coped better during the drought than during prior drought episodes. Government also strengthened communities' adaptive capacity to climatic, socio-economic and health challenges.

Through the national adoption of the sustainable intensive conservation agriculture model, agro-ecological tailoring of crops, and accelerated irrigation development, Zimbabwe is now ordinarily food-secure and is able to respond and cope with future droughts better based on experiences from the 2023/2024 El Nino-induced drought. Nutrition will improve from 24 % in 2024 to 20% in 2030 with increased food security and prevalence of stunting has reduced to 23% from 34.5% in 2020.

2.2. Agriculture Contribution to the economy

Agriculture remains a vital sector of Zimbabwe's economy, despite its contribution to GDP fluctuating, tied to the quality of the summer season rainfall (Figure 2.2.1)

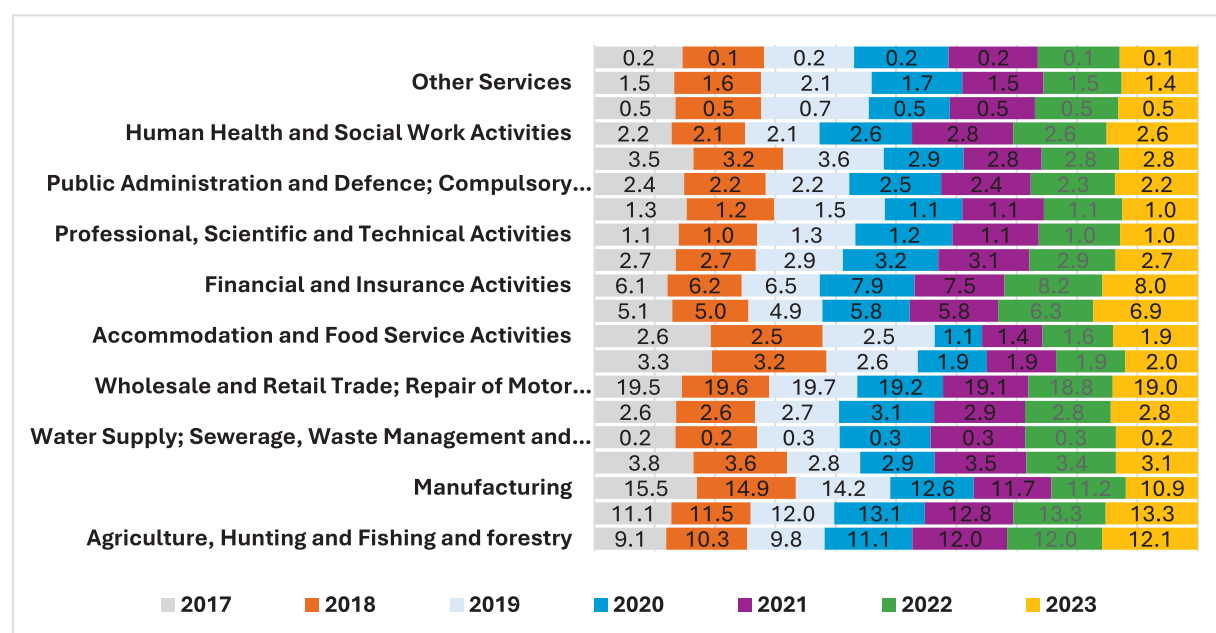
Figure 2.2.1 Gross Domestic Product Growth Rates for Agriculture, Hunting, Fishing and Forestry at Constant Prices



Following the rebasing of the economy, in 2024, in a drought year, agriculture became the fifth biggest contributor to national GDP after manufacturing, mining, wholesale and trading and financial services. If agriculture-led value chains are considered, the contribution of agriculture to GDP will be 15-17%, reflecting the sector's causal, co-factor and multiplier linkages to other sectors of the economy, and principally its strong linkage to manufacturing. With the adoption and promotion of the value chain approach to agricultural development at every level, this trend is bound to continue. The agricultural sector employs about 60–70% of the population and supplies over 60% of raw materials to manufacturing. Agriculture consumes 43% of manufacturing products.

Average GDP contribution rose from 9% in 2017 to 12.1% in 2023, driven by improved production in maize, wheat, tobacco and blue berries. Tobacco accounts for nearly 30% of total export earnings. Wheat production surged by 255.8% between 2017 and 2024, reducing historical reliance on imports, and priming Zimbabwe to be a regional exporter of wheat.

Figure 2.2.2. Gross Domestic Product by Industry at Constant Prices: %Contribution

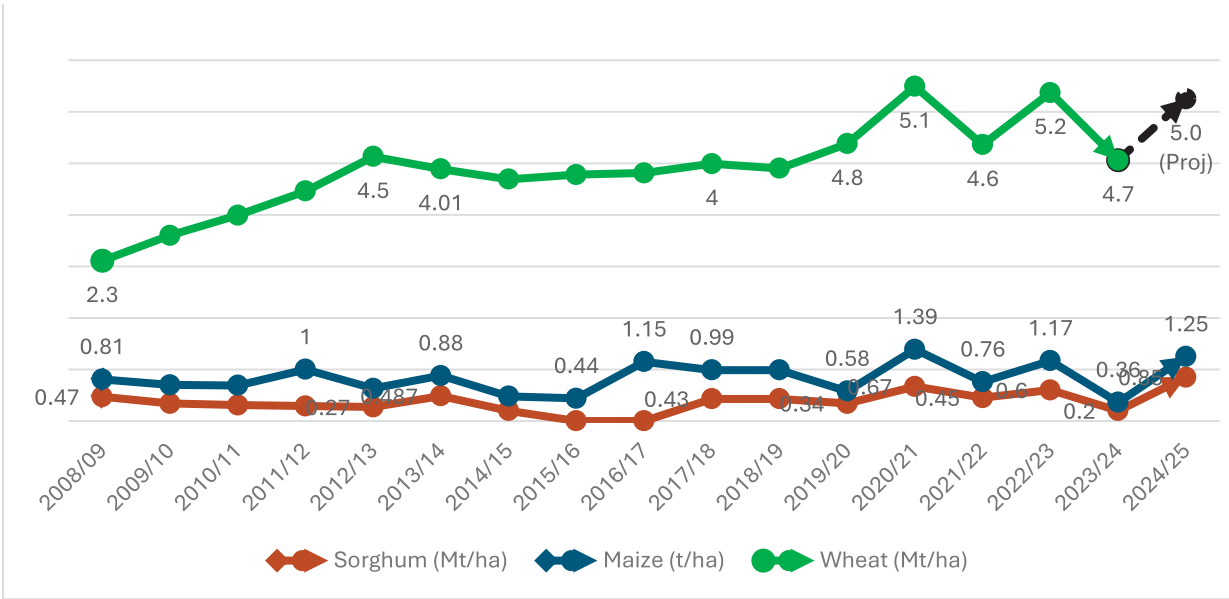


The nexus between agricultural development, rural industrialization and rural development highlights the sector’s importance in Zimbabwe’s economic development. The continued reliance on rain-fed agriculture provides an existential threat to sustained crop and livestock increases, and to food security. Agriculture’s contribution to the economy continues to be linked to the quality of the summer rainfall season.

2.3. Agriculture Production and Productivity Trends

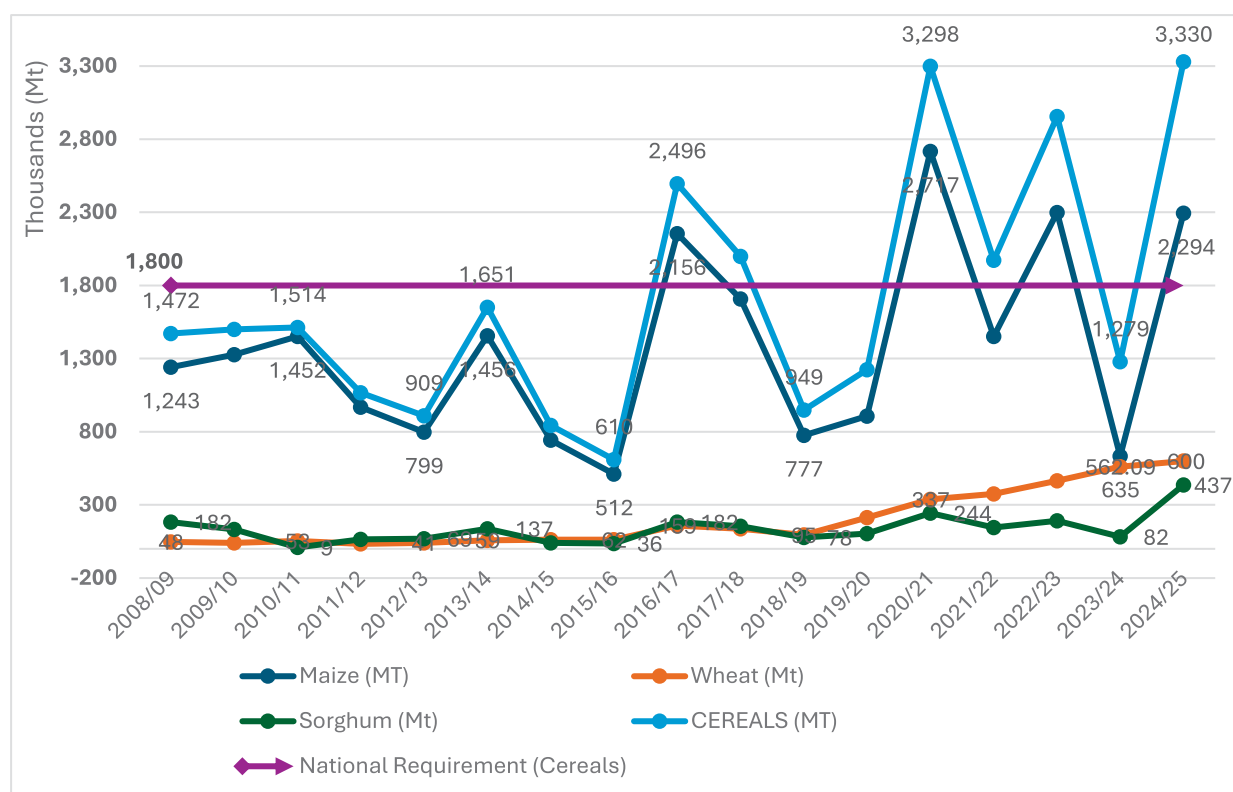
The implementation of the Agriculture Food Systems and Rural Transformation Strategy 1 brought transformative results to the sector as evidenced by historic and unprecedented increases in the production of major cereal crops. The annual cereals production volumes fluctuated in response to climatic shocks, such as those caused by the El Nino- induced droughts. For example, maize average yield was 1.25MT/HA during the 2024/25 summer season, while wheat was 4.7MT/HA in 2024. Maize productivity remains low, against a potential of 5 MT/HA. Wheat could increase to 6-8MT/HA.

Figure 2.3.1 Productivity Trends for Cereals: 2009 - 2024



The changes in yield levels positively correlate with volumes produced and consequently food security and self-sufficiency between the successive years. New agronomic methods, coupled with better extension capacitation and delivery, will increase maize yield, especially in communal areas. Additional attention to soil health, better research and development, improved linkages of research-education extension-farmer training systems, modernisation, timely inputs and equipment availability and affordability; irrigation development, better access to markets, affordable finance; pest and disease management, reduction in loss and waste, and timely control of migratory pests can further increase agricultural productivity.

Figure 2.3.2. Cereal Production versus National Requirement: 2009 - 2025

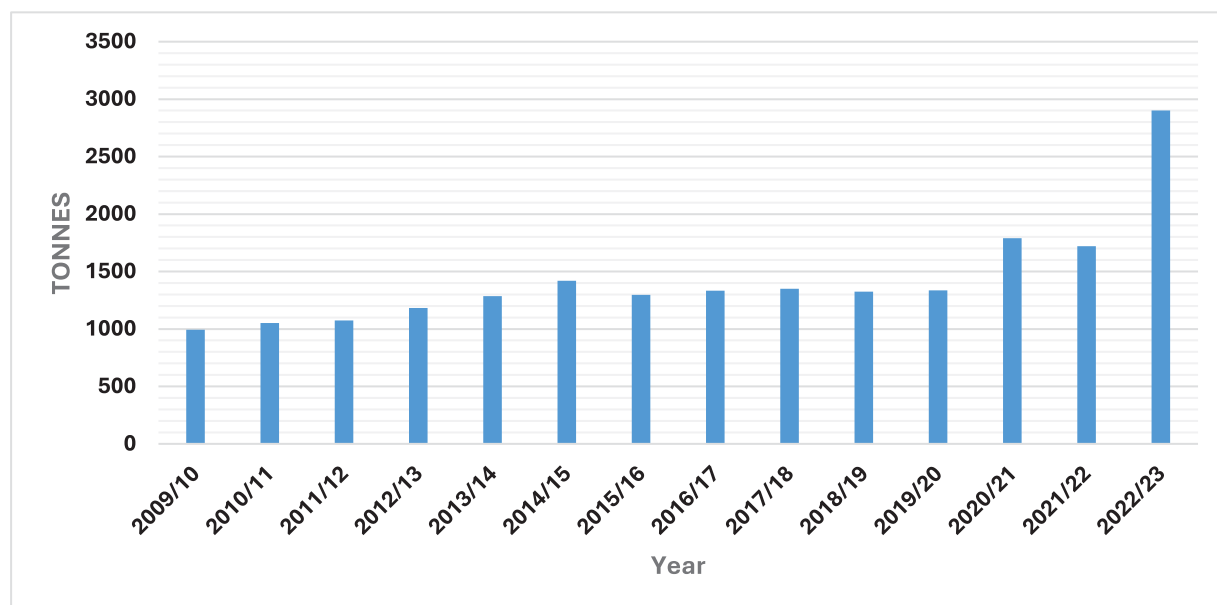


Clearly, since the advent of the Second Republic, the food security situation at a national level has improved markedly.

The nation requires 1.8 million MT of cereals annually (1.4 million MT for human consumption and 400 000MT for livestock consumption). Upon

reflection - the introduction of the National Enhanced Agricultural Productivity Scheme (NEAPS), and its precursor Command Agriculture, the introduction of the Pfumvudza/Intwasa programme and associated agro-ecological tailoring of crops; the initiation of Rural Development 8.0 interventions, and structural and institutional transformation of MDAs such as the designation of ARDA as food security agent, and associated accelerated irrigation development and rehabilitation, and capacitation of the extension system - are notable strategic interventions which significantly contributed to the capacity of the nation to attain food security. And when episodic droughts occurred, the wheat-based food security strategy, and policy intervention to allow private sector food imports, proved sufficient to cushion the nation. Resultantly, Zimbabwe has emerged from the AFSRTS1 in 2025 as a resilient food secure nation, capable of withstanding weather-induced shocks.

Figure 2.3.3. Rice Production Trends

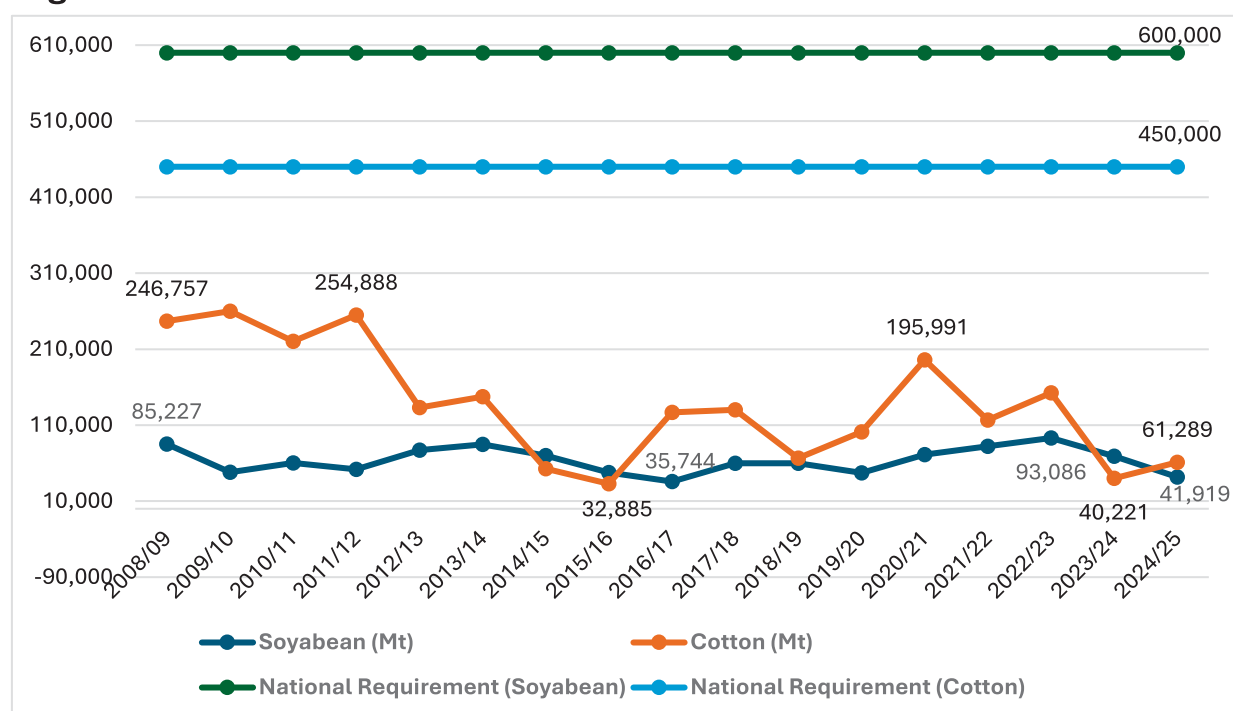


After maize, wheat and traditional grains, rice is the most consumed cereal. Sadly, Zimbabwe is 98% reliant on rice imports to meet a growing demand from a youthful and urbanising population. Some 250 000 MT are imported annually. About USD 80 million is spent every year on rice imports.

Table 2.3.4 Rice Consumptions Patterns compared to major cereals

Commodity	Recommended annual per capita consumption rates (Kg)	National Requirement (MT)	Monthly National Requirement (MT)	Target Production 2025
Maize	92.4	1,471,326	122,611	2,520,000
Rice	16	254,775	21,231	2,000
Wheat	17.8	283,437	23,620	600,000
Traditional grains	13.2	210,189	17,516	687,000

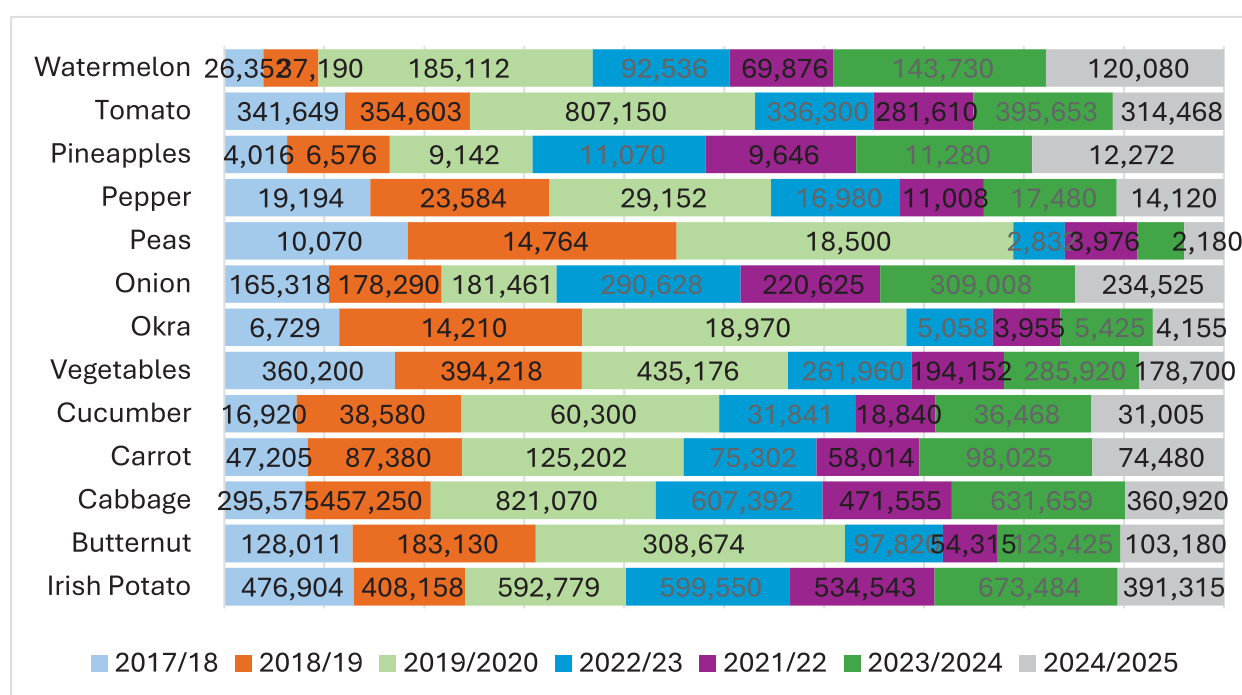
Figure 2.3.5. Oil Seed Production Trends: 2009 - 2025



The stockfeed and oil industries require 240 000 MT of soyabean and 450 000 MT of cotton and 70 000 MT of sunflower, annually. Government declared sunflower as a strategic oil seed crop, to be part of the Presidential Input Scheme. This has resulted in a sharp increase in sunflower production. Meanwhile, soybean production—critical for protein-rich feed—fluctuated

with policy shifts and market volatility. Cotton production, a key source of cotton-seed cake for feed, reduced by 75.2% between 2009 and 2024 due to climate-induced shocks, low yield, late farmer payments, poor market linkages, and fluctuating world prices. Groundnuts, sesame and other oilseeds should also be given increasing attention, especially as these are drought tolerant. As food security has been attained, the challenge now is to ensure feed and oilseeds security.

Figure 2.3.6 Annual horticulture crop production: 2017/18 – 2024/25



Zimbabwe's horticulture industry presents a compelling case for national economic transformation. Zimbabwe exported 8000T of blueberries in 2024 and is projected to export 12 000T in 2025, while global production of blueberries surpassed 2 million metric tons in 2024 (*Source: International Blueberry Organisation*), demand remains robust and likely exceeds what's currently available - prompting global industry projections that production must double to satisfy growing global consumption. In monetary terms, the global blueberry market is worth nearly USD 10 billion.

This underscores that there is still potential to expand and tap into this global demand. The country's favorable climate allows year-round production of high-value crops across annuals, perennials, and plantations categories. These crops, many with proven export markets, offer the potential for rapid growth and value addition if constraints are addressed.

The sector's potential is not merely agricultural but economic. A well-developed horticulture industry would:

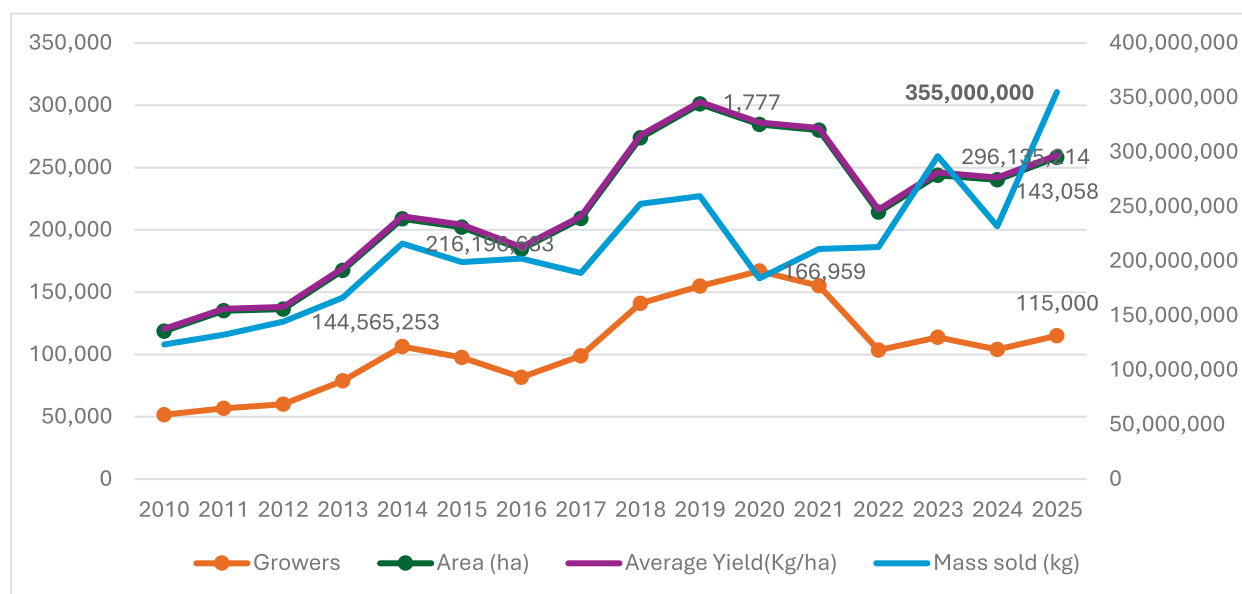
- Reduce trade deficits and dependency on primary commodities
- Create hundreds of thousands of rural and urban jobs
- Enable inclusive growth through SME and smallholder integration
- Generate foreign exchange and fiscal revenues

Zimbabwe's horticulture sector has undergone a resurgence since 2017, transforming from a low performing industry into a dynamic growth engine. From a 1999 peak of USD140 million to a USD 20 million low, the sector has re-booted to over USD120 million annual exports from 2023. This rebound has been fueled by policy support, investments in high-value crops such as blueberries and avocados, export market diversification, and resuscitation of conventional horticulture development and better sector coordination. Under the Rural Development 8.0 initiative, further growth of the domestic and export horticulture is anticipated. From experimental plantings of blue berry in 2008 and first commercial exports in 2017, production skyrocketed from USD1 million in 2018 to USD 50 million by 2024, with volumes surging by 351% since 2020.

Significant fluctuations in production of annual horticulture crops are glaringly apparent pre- and post- AFSRTS 1 implementation. Zimbabwe has become self-sufficient in Irish potato production, due to better policy, better sector investment, sector reorganization and support through designation of

potato as a strategic crop. Sweet potato production should increase as government has intervened by providing elite virus-free vines to rural communities to improve yield and acceptability by markets of the newer varieties. Pineapple production is increasing too, rising to 12 272 MT in the 2024/25 season from 4 016 MT in the 2017/18 season.

Figure 2.3.7 Tobacco production in Zimbabwe: 2008-2025

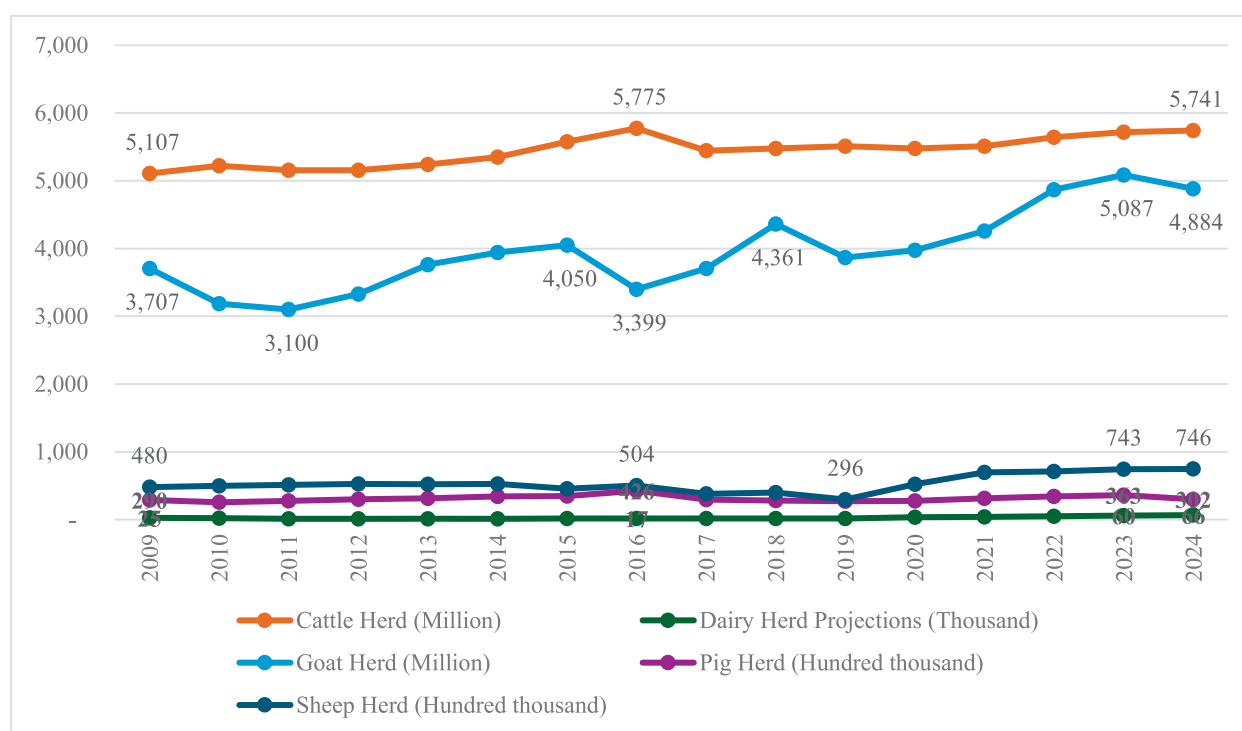


The structure of the tobacco sector has changed drastically following the successful land reform programme. Upwards of 85% of the crop is now produced by smallholder farmers, and 60% of production is from beneficiaries of the land reform programme. This contrasts with the large scale commercial crop production model pre-2000. Additionally, the crop is grown predominantly under contract, which contributes 93% of production. In the 2022/23 season production had surged to a record 296 million kg, and the volume marketed is anticipated to exceed 355 million in the 2024/2025 season, generating over USD 1.2 billion for some 130 000 growers. With average gross annual returns of over USD 8500 per grower, tobacco has had a transformative impact on livelihoods, contributing to rural transformation.

Zimbabwe is Africa's largest tobacco producer. The growth of the sector has been guided by the government's Tobacco Value Chain Transformation Plan: 2021-2025. Despite this growth, the sector faces significant socioeconomic and environmental challenges. The reliance on contract farming has created heavy dependence on external capital, leading to substantial profit repatriation and vulnerability to global price fluctuations. Environmental degradation, particularly deforestation from firewood-based tobacco curing, threatens long-term sustainability. Smallholders' access to alternative energy sources, such as coal, should be popularized and promoted.

Recent reforms aim to address structural weaknesses while boosting local value capture. The Tobacco Value Chain Transformation Plan targeted increasing local financing from 5% to 70% by 2025 and expanding value-added processing from 2% to 30% of the crop. This underscores tobacco's critical role in Zimbabwe's economy, with its future dependent on continued production of desired flavorful styles, attention to traceability, improved sustainability and environmental stewardship, localization of financing and value addition and beneficiation. The revised target is to produce 500 million kg annually by 2030, from pre-and post-harvest loss reduction and yield increase, with a less of focus on area expansion.

Figure 2.3.8 National Livestock Herd

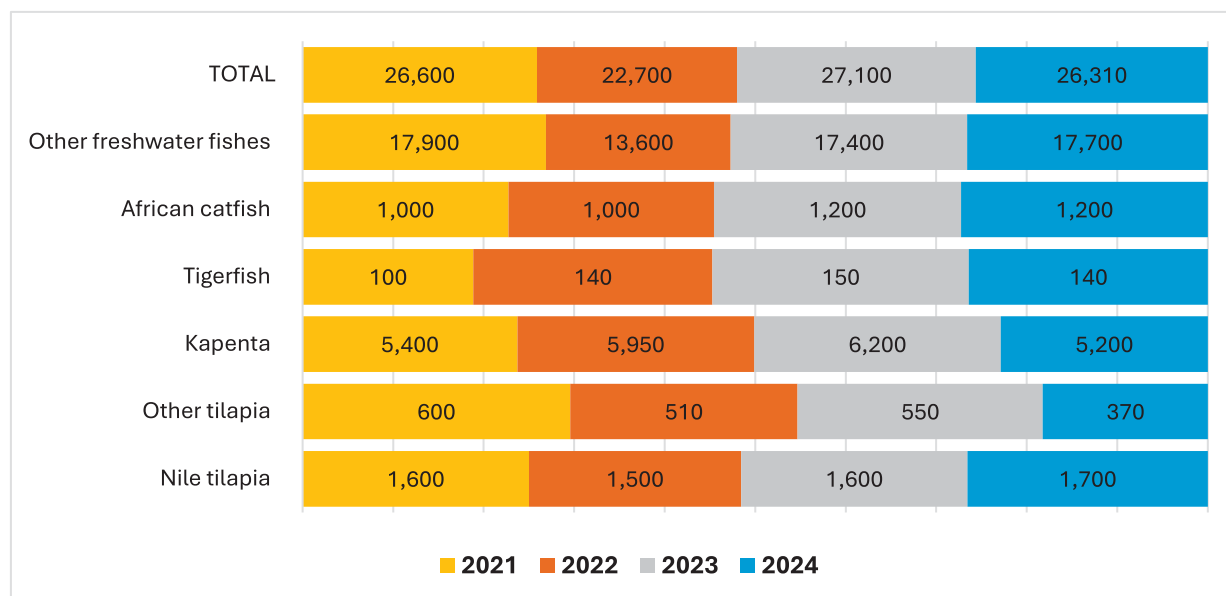


Since the launch of the Livestock Recovery and Growth Plan under the AFSRTS1, all livestock species have recorded steady growth, despite climate-induced shocks, occasional disease burden, increasing shortage of pastures and increasing inbreeding, especially, in communal areas. The Livestock Recovery and Growth Plan supported the revival of the industry through provision of improved breeds, better disease control and pasture development and management, feed formulation, supply and distribution of feed and fodder during times of distress, and better extension support. A new electronic livestock card has been developed to gather real-time statistics, and to improve policy interventions to further grow the sector. Public and private sector investments have grown since 2020. With better and deepening market development, especially for inclusive beef, goat, poultry value chains, locally and abroad, the livestock sector is poised for accelerated growth.

Drought severely reduced natural pasture availability, forcing reliance on crop residues such as maize stover and emergency feed interventions as observed

during the 2023/24 El Nino-induced drought season. The wider adoption of drought-tolerant fodder crops, and on-farm and household feed formulation, have bolstered resilience of the livestock sector.

Figure 2.3.9 Fish production in Zimbabwe: 2021-2024



The Ministry's mandate was broadened to include fisheries in 2021, enabling the development and launch of a “Fisheries and Aquaculture Resources Plan”. The Presidential Community Fisheries Plan launched under RD 8.0, and private sector investments have begun to bear fruit. National fish production increased from 22 700 MT in 2022 to 27 100 MT in 2024. Nile tilapia, the main species, saw production stabilizing around 1 600 MT (Figure 2.3.9).

Kapenta dominates capture fisheries, contributing 40% of annual volumes. Illegal, unregulated and unregistered overfishing have however seen a decline in Kapenta annual catches from a peak of 27 000 MT in the 1990s to the current 5000 MT annually. Zimbabwe has now joined the SADC Fisheries Monitoring and Surveillance Centre which could contribute to better surveillance and management of Kapenta for enhanced and sustainable fishing.

2.4. Climate Change Variability and Disaster Risk Vulnerability

Due to climate change, Zimbabwe is predicted to become drier in the decades ahead. Climate change is manifesting as shortened rainfall seasons, uneven rainfall distribution, heightened temperatures, and increased pest and disease pressure. The frequency of droughts is increasing, now occurring every 3-4 years, from 5-7 years in the 1980s. Generally, climate patterns have shifted, necessitating the production of a new agro-ecological zones map in 2020. About 60% of the country is now under Regions 4 and 5 (Table 2.4.1) and 55% of the rural population resides in regions 4 and 5.

Fig 2.4.1: Zimbabwe Agroecological Maps: 1960 and 2020

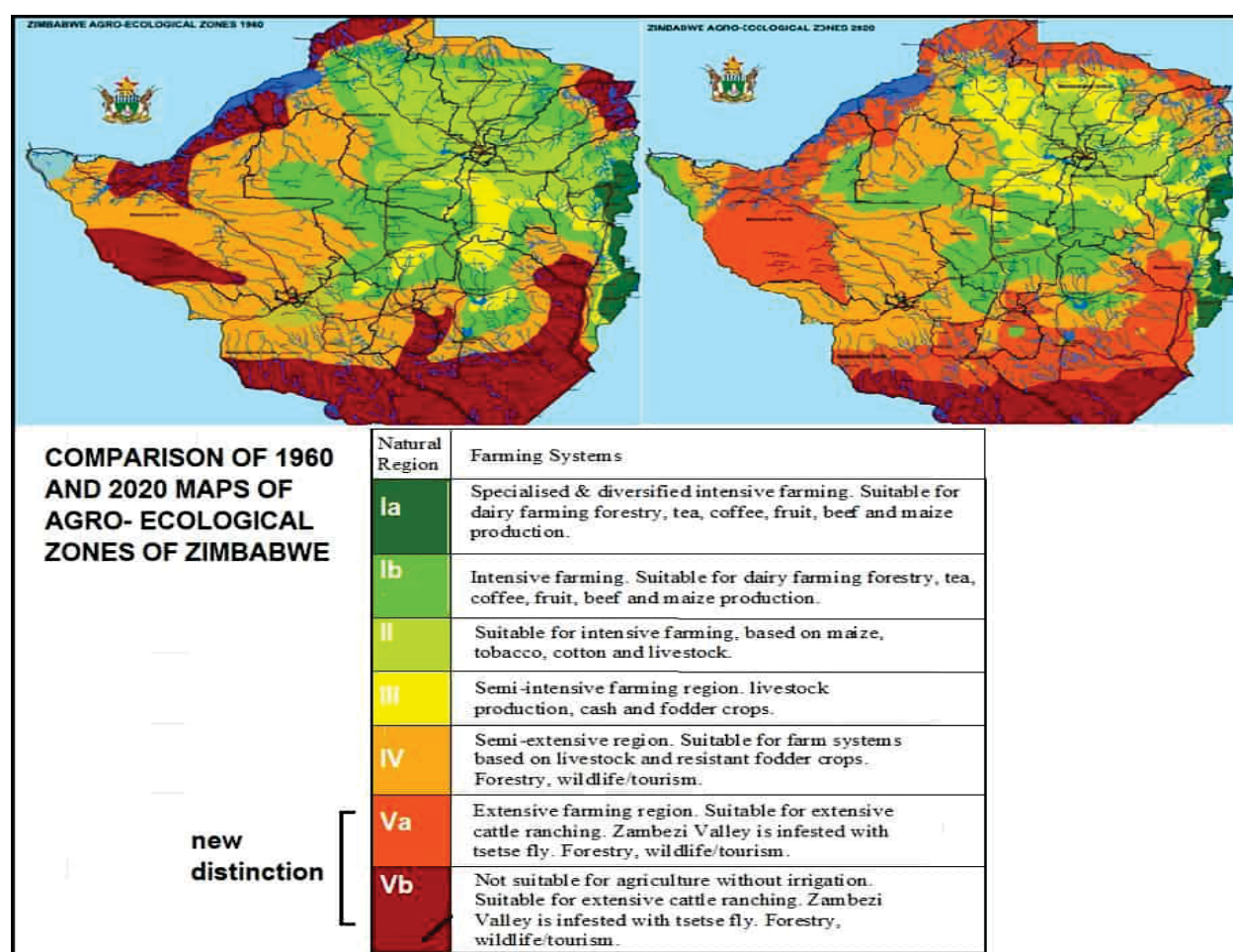
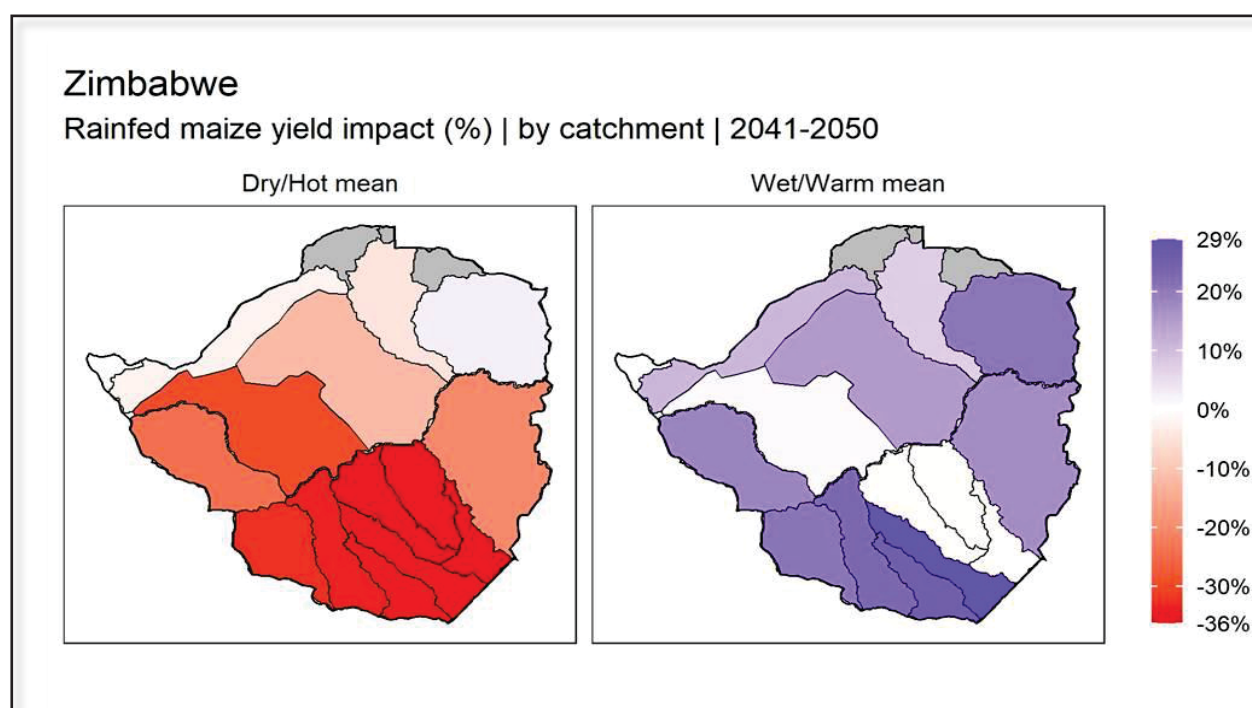


Figure 2.4.2 depicts future scenarios for maize production, indicating up to 36% reduction in rain-fed maize production by 2050.

Figure 2.4.2 Rainfed maize yield impact (%) by catchment 2041-2050



2.5. Irrigation and Infrastructure Development and Management

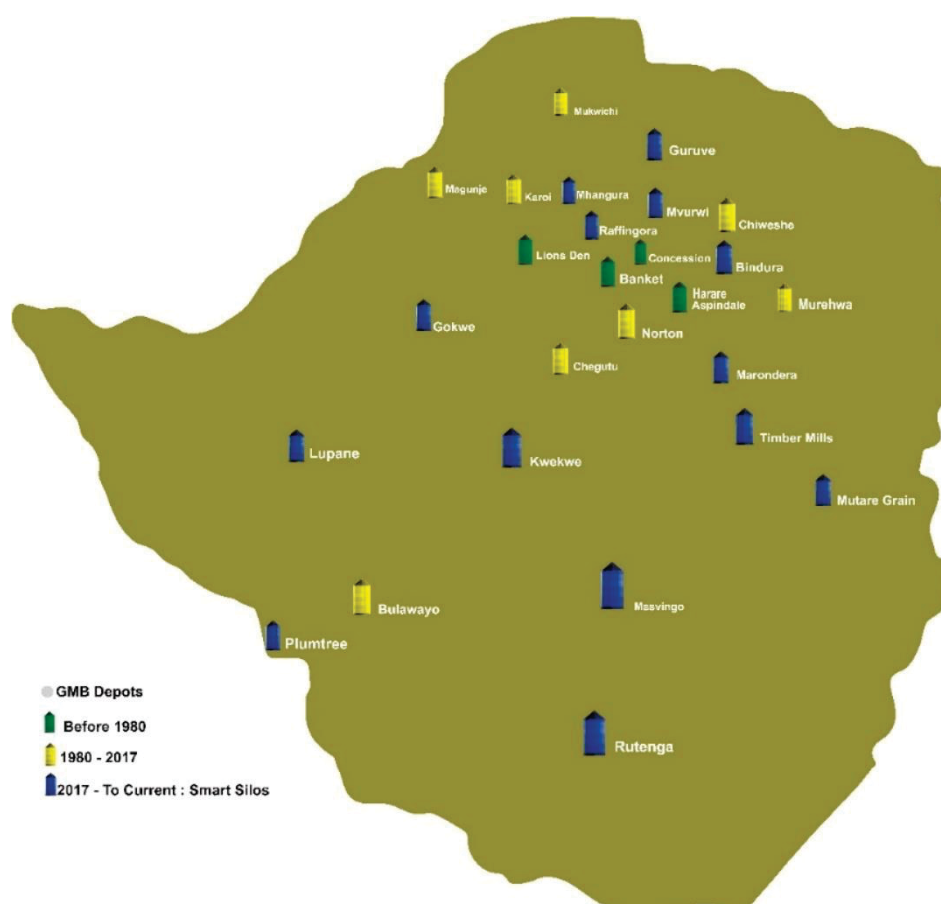
Zimbabwe is endowed with vast amounts of water sources (ground and surface), with a total of 10 600 dams, with a potential to irrigate over 2,000,000ha. The country has a 221 900ha functional irrigation area. Currently, nine dam projects are under construction, with three having been completed under the new “Infrastructure 6.0” of a “dam is an economy concept”. The Irrigation Development Alliance, a private-public sector alliance formed by government in 2021 to accelerate irrigation development, targets to develop 100 000 ha in the next three years, contributing substantially to the 496 000-ha planned by 2030. Of this target, 350 000 ha are planned for summer irrigation to produce 1.8 million MT of cereals, with a further potential of 1.8 million MT wheat in winter, to climate-proof food security. Additionally, the A1 productivity Booster kit scheme should unlock a further 180 000 Ha of irrigation by 2035.

The modernisation of agriculture through the adoption of technology, innovation and ICT is increasing among farmers. It is, therefore, to be expected that irrigation, mechanisation and farm infrastructure development will continue to receive the attention they deserve to 2030.

Regarding mechanisation, Zimbabwe's mechanisation index is 43% a 97.7% growth from 2017, with over 15 500 tractor units compared to just 7895 in 2017. The mechanisation of the smallholder sector, in villages to replace animal drought power and the hand hoe, could contribute the next stage of major productivity improvement – a mechanisation revolution. Of the estimated 35 000 small tractor units anticipated for the 35 000 villages, only 1000 are available, presenting a business opportunity for the private sector, to be matched with sufficient de-risking under the Mechanisation Development Alliance and RD8.0 programming by government.

The GMB silo expansion, currently underway, is unprecedented. Since silo construction commenced under the colonial regime, with the opening of the Aspindale depot in 1949. Since then, some 750 000 MT of silo space has been built to 2022. However, 14 sites, each with a capacity of 56 000 MT, are now under construction, a revolutionary 750 000 MT addition by 2027, to bring the cumulative silo storage space to 1.5 million MT.

Fig:2.5 Map of old and new silo depots indicating years when they were commissioned



While previous emphasis was to build silos in major production areas, the major policy change has been to construct silos in areas where the most need for Strategic Grain Reserves are, in lower production potential provinces.

The private sector has also built storage capacity and grain drying capacity as shown in Table 2.5

Table 2.5 National Grain Drying Capacity

Province	Drying capacity (t/hr)		
	Private	GMB	Total
Manicaland	50	177	227
Mashonaland Central	180	243	423
Mashonaland East	90	93	183
Mashonaland West	415	204	619
Masvingo		168	168
Matabeleland North	20	93	113
Matabeleland South		75	75
Midlands	30	168	198
TOTAL			2006

Additionally, the planned 300 mini-silos under the Zunde RaMambo storage concept for Chiefs should create local grain buffer reserves for communities during times of need.

2.6. Agriculture Finance and Investment

The provision of timely and appropriately tenured finance is a key ingredient for the sustained transformation of the agricultural sector. A developmental philosophy has been adopted by government – playing the dual role of being a strong actor in investment and concurrently creating a conducive environment to attract private sector investment. In the latter regard, the transition from “Command Agriculture” to the government-guaranteed and bank-enabled financing dubbed “National Enhanced Agriculture Productivity Scheme (NEAPS)”, presented an opportunity for non-collateral lending to farmers. Value chain financing as a result of a government policy directive to the private sector to secure at least 40% of their annual raw material

requirements through contract farming has been hugely successful. This has seen growth in wheat, soyabean and maize production.

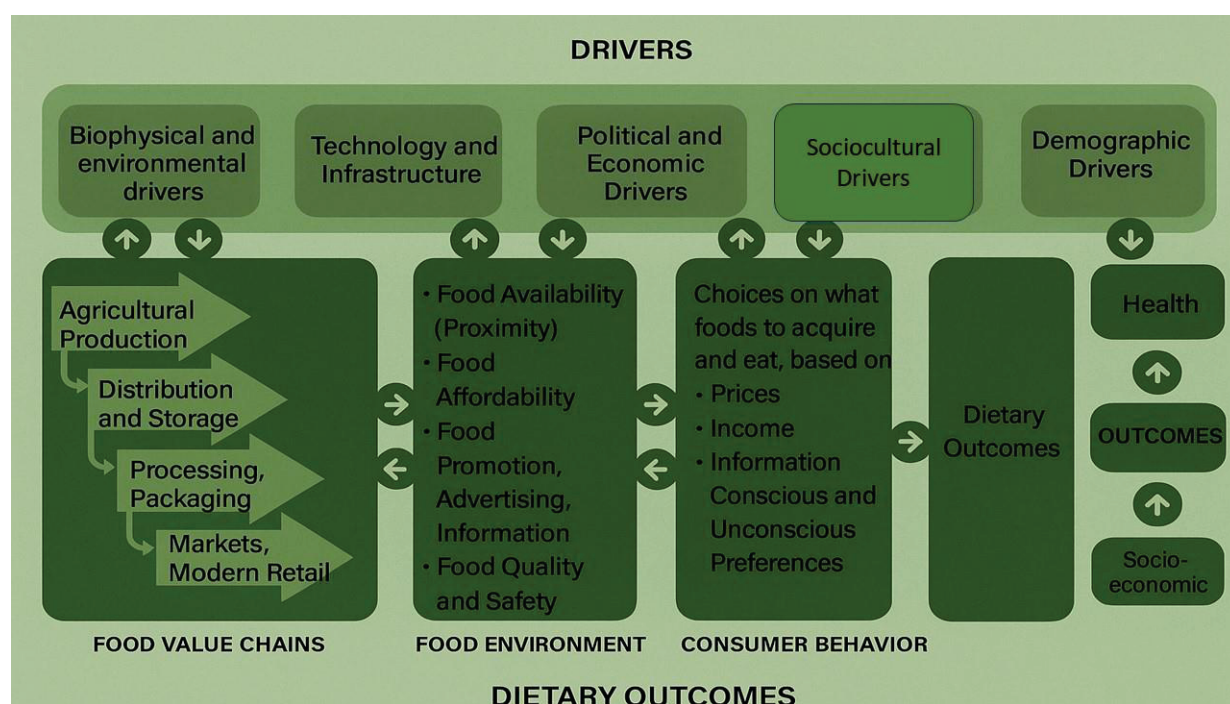
Innovative financing for farmers in the post-land reform era, had to be dominated by non-collateral value chain financing. In many such cases, merchants/contractors borrowed from banks on behalf of farmers and extended inputs and provided agronomic support to enhance production for value chains such as tobacco, wheat, soybean, horticulture and poultry. Government responded by resuscitating the Agricultural Finance Corporation (AFC) in 2021, with special windows for agricultural development finance, commercial banking, tractor leasing and insurance facilities to derisk agriculture. The model has succeeded. Some 40 000 ha of wheat, maize and sorghum were supported by AFC alone in the 2024/2025 season. The ARDA crowd-financing model, is set for launch in time for the 2025/2026 summer season. This will unlock a new line of financing for agricultural development.

The Second Republic's revolutionary title deeds programme, deeds of grant issuance, and upliftment of endorsements of qualifying BIPPA and indigenously owned farms, has opened another vista to accelerate financing for further agricultural transformation. Furthermore, the A1 focused productivity booster scheme will unlock further production potential from 180 000 Ha of irrigation to be developed by 2030. The scheme is based on accessing title deeds and linking this to an automatic access to credit to develop irrigation for 1-3 hectares.

3. CONTEXT OF FOOD SYSTEMS IN ZIMBABWE

In the last decade, changes in Zimbabwe's food systems have been influenced by demographic, economic and climate-related factors. Zimbabwe adopted a food systems approach to agriculture in 2022 which focused on the following five trackers which were fully integrated into AFSRTS 1.

Fig:3.1 Contextual Framework of Food Systems in Zimbabwe



3.1. Changing Demographic and Consumption Patterns

Zimbabwe's population is dominated by young people, as 58.5% of the population is under 40 years. This has shifted consumption patterns. In urban areas, consumption patterns are skewed towards nontraditional foods such as rice, bread, macaroni, potatoes and spaghetti, while consumption of maize has been decreasing. In rural areas, the consumption of maize and traditional grains remains predominant.

3.2. Sustained Economic Growth

The implementation of the Transitional Stabilization Programme (TSP) 2018-2020 and National Development Strategy 1 (2021-2025) facilitated sustained economic growth. This growth is driving demand for diverse and high-quality food products, including meat, fish and fish products, dairy, and processed foods. Such shifts, which are expected to increase over the next decade, influence both production and consumption patterns.

3.3. Increasingly Urban Population

Zimbabwe's urban population has increased from 33% in 2012 to 39% in 2022. This growth resulted in an increase in the demand for food in urban areas, presenting both challenges and opportunities. Meeting this demand requires significant increases in agricultural productivity, investments in efficient transport, storage, logistics and food processing. According to the Zimbabwe Livelihoods Assessment of 2024, some 35% of urban households were food-insecure. Government responded by supporting 500 000 urban households with Pfumvudza/Intwasa inputs under the Transient Urban Cultivation model.

3.4. Nutrition

Adequate food and nutrition security are fundamental citizen rights and are a global commitment by Zimbabwe in fulfilment of Sustainable Development Goal 2 (Zero Hunger). Despite notable progress, the country still faces the burden of malnutrition, with at least one in five children suffering from chronic malnutrition, 2.2% suffering from overnutrition and one in three suffering from micronutrient deficiencies. On a positive note, Zimbabwe is the only country in the SADC region on course to meeting the SDG goals on malnutrition.

3.5. Sustainable Water Management

Efficient and sustainable water management are critical for agri-food systems transformation in Zimbabwe. Due to climate change, the country is predicted to become drier in the decades ahead. Water harvesting at every scale must

therefore, be prioritized, alongside the promotion and development of efficient water management practices. The opportunity is that Zimbabwe has 10.6 billion cubic meters of water, in 10 600 dams, capable of irrigating 2.2 million hectares. The irony is that Zimbabwe is still dependent on rain-fed agriculture for its food security, with only 10% of irrigable potential utilized, hence the need to progressively “delink production from rainfall” and adopting climate-smart agricultural practices during the rainfall summer season.

3.6. Climate Change and Biodiversity

Climate change poses a formidable threat to agricultural production and productivity. Variations in precipitation, rising temperatures, and extreme weather events adversely affect crop yields and food security, and heighten the potential burden of human and animal diseases. Zimbabwe is predicted to get drier in the next 50 years, so the implementation of sustainable land management and climate-smart agriculture practices is vital to mitigate these challenges. Agrobiodiversity has been recognised in Zimbabwe as a valuable resource for food security, nutrition, livelihoods, and climate change adaptation. Climate change and biodiversity loss in Zimbabwe create a vicious cycle and conspire to diminish agricultural resilience. Integrated approaches, combining traditional knowledge, climate-smart practices, and biodiversity conservation are vital to safeguarding food security and improving livelihoods.

The sustainable intensive conservation agriculture model and associated organic farming methods, have a potential for carbon sequestration through minimum tillage practices. These positive attributes should be flagged for climate financing through climate offset credits, and other mechanisms.

3.7. Inclusivity, Gender and Youth

There is a growing recognition that empowering women and youth in agriculture can accelerate the transformation of Zimbabwe's agriculture sector. Women provide over 60% of the agricultural labour in Zimbabwe but may encounter challenges in accessing resources such as land, credit, and agricultural inputs. Addressing these challenges can unlock substantial productivity. Increasing women's participation in agricultural value chains improves household nutrition and strengthens community resilience and economic development. Policies and interventions that support women are essential for the accelerated transformation of the agriculture sector.

The country's youths present a significant demographic dividend and an opportunity for agricultural and food systems growth, innovation, and sustainability. Engaging youth in agriculture is vital for the sector's future, in part because young people can drive the adoption of new technologies, modern farming techniques, and innovative business models. With training, mentorship, and access to resources such as land and finance, the youth can become key agents in transforming traditional agricultural practices. Youth engagement in agriculture also helps to address issues of unemployment and rural-urban migration.

3.8. Sustainable Market Systems

Access to domestic, regional, and international agriculture markets presents an important driver for agricultural growth. Reducing vulnerability and susceptibility to fluctuations in product (quantity and quality) will guarantee markets and market access. Building and embedding value chain resilience to shocks is therefore required. The development of sustainable agri-food systems is largely dependent on sustainable marketing systems, pricing policies and market infrastructure that increase supply chain efficiencies.

3.9. Trade Development

Trade development has played a significant role in shaping Zimbabwe's agrifood systems, influencing production practices, market access, and socio-economic outcomes. In future, trade policies and regional integration, especially through AfCFTA, can be crucial for transforming food systems. The AfCFTA promotes intra-African trade by lowering tariffs, removing trade barriers, and harmonizing standards, thus improving market access for agricultural products across the continent. By fostering stronger economic ties among African nations, AfCFTA helps create more resilient food systems that are less susceptible to external shocks and price volatility. Harmonizing trade policies and standards under AfCFTA facilitates smoother cross-border movement of goods, reducing costs and enhancing the availability of diverse food products.

Sadly, Africa still imports over USD 90 billion worth of agricultural products annually from outside the continent. The upside is that this presents a massive opportunity for intra-African trade. Zimbabwe must transition to become a regional agro-industrial hub (for value addition and beneficiation and logistics) to maximize its benefits from the opportunity presented by the AfCFTA. In this regard, a whole of government approach is required to continuously unlock opportunities.

3.10. Rural Development

Rural development in Zimbabwe is inextricably linked to the transformation of agriculture and food systems. Rural development aims to improve the economic, social, and environmental conditions of rural areas in Zimbabwe by promoting sustainable agriculture, enhancing access to essential services, and fostering economic growth. As 62% of the Zimbabwean population is in rural areas, largely employed in subsistence farming, a transition to "agriculture as a business model" would uplift rural livelihoods. The

government's Rural Development 8.0 interventions are appropriately crafted to improve livelihoods and uplift households out of poverty. The objectives of RD.8.0 are to:

- Enhance agricultural productivity and food security;
- Promote value addition and agro-processing industries in rural areas;
- Promote inclusive and sustainable economic growth in rural areas;
- Strengthen social cohesion and community resilience and;
- Empower rural communities.

3.11. Security of Tenure

The noticeable new paradigm amongst Zimbabwean farmers, especially most beneficiaries of the land reform programme, is to regard and conduct farming as a business. In October 2024, the government announced that all land held by beneficiaries of the Land Reform Programme under 99-year leases, offer letters and permits, will now be held under a bankable, registrable and transferrable land title. The security of tenure to all agricultural land regularized under this programme, will at all-time only be transferrable among qualifying Zimbabweans. The land targeted for the new land tenure system excludes communal land that is under the jurisdiction of traditional Chiefs. This new land tenure system should improve production and productivity, making agriculture viable, profitable and sustainable. This will spur economic growth.

3.12. Food Loss and Waste

Pre-and post-harvest losses in maize is estimated at 33% and for some vegetables and banana can be as high as 45%. While continuous annual studies will be instituted to continuously monitor value chain losses, focus will be on major staple foods to reduce loss through: better field practices, better storage, improved pest and disease control and storage and silo

construction at chiefs homesteads and GMB. Capacity building among farmers will be prioritised as well as infrastructure development.

3.13. Cost of Production

Zimbabwe has generally remained a high-cost production country, driven by high costs of fertiliser, equipment, seed and chemicals.

Table 3.1 Major cost Drivers for maize

Parameter	% of total cots
Fertiliser	40
Seed	6
Equipment	19
Chemical	8
Fuel	2

These represent about 75% if total costs. Efforts will be made to reduce the cost of production through promotion of efficient farming, attaining higher yields per MT of input and localisation of fertiliser production.

3.14. Healthy population through Improved WASH for increased Agricultural Production

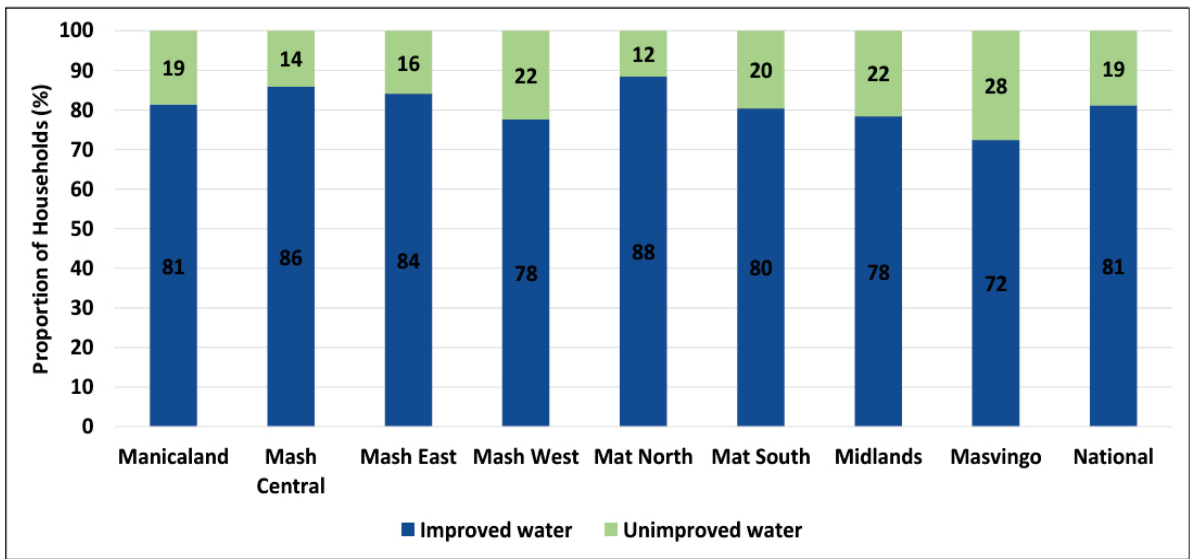
Drinking water supply

According to the ZIMLAC 2025 report, access to water supply has been improving since 2020. Access to basic water drinking supply services has risen from 54.8% to 72.4% and access to improved drinking water services also increased from 74.3% to 88.4% between 2018 and 2024.

According to the Zimbabwe Livelihoods Assessment Committee Report (2024), access to improved drinking water sources increased from 77% in

2020 to 81.2% in 2024 and access to basic drinking water services decreased from 60.3% to 57.7%.

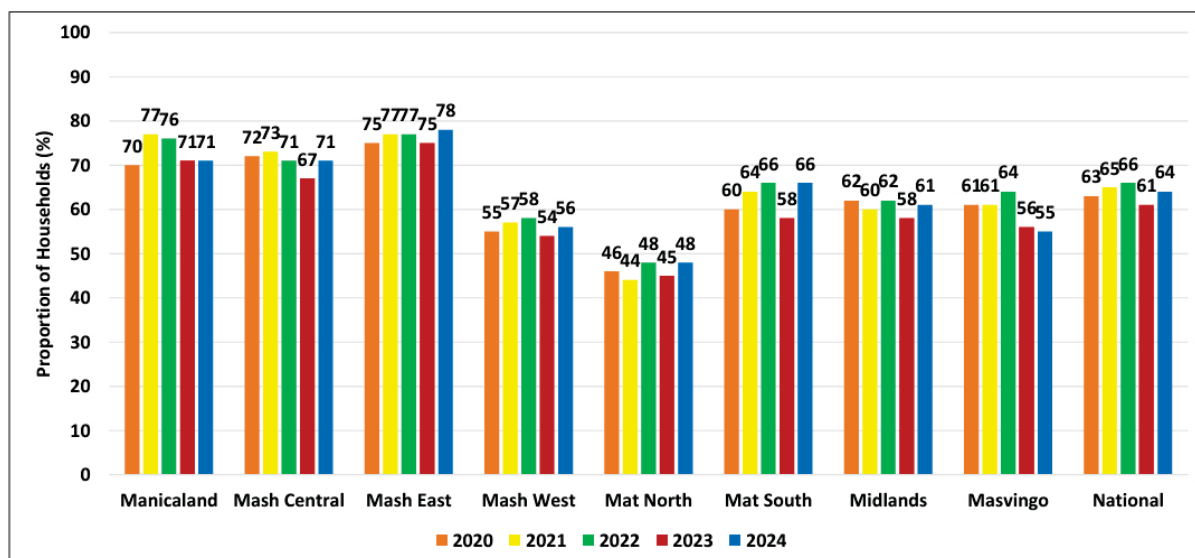
Fig 3.2: Access to improved water source by Province



The Zimbabwe Urban Livelihoods Assessment Report (ZIMLAC, 2024) reported that 94% of households have access to safe drinking water within a 30 minutes roundtrip. Provinces with the least access to improved drinking water include Matabeleland South (80%), followed by Midlands (78%). In terms of access to basic drinking water services, Midlands (50%), Matabeleland South (50%) and Masvingo (44%) have the least access.

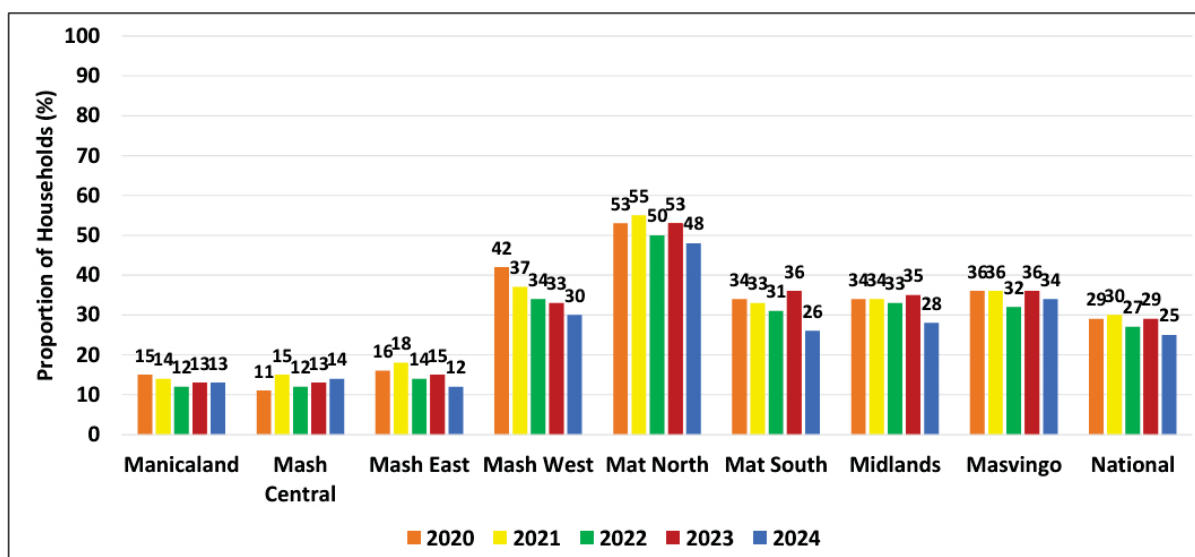
There has been no significant change in the proportion of households with basic sanitation services as well as those practising open defaecation from 2020.

Fig 3.3: Access to improved Sanitation by Province



The proportion of households accessing improved sanitation has not significantly changed from 2020 through to 2024. Matabeleland North (48%) had the lowest proportion of households accessing improved sanitation.

Fig 3.4: Open Defecation by Province



Matabeleland North had the highest proportion of households which practiced open defecation across the five years.

4. LOOKING AHEAD

The Ministry's thrust to 2030 is guided by the following priority impact areas:

- i. Food Security and Food Sovereignty;
- ii. Nutrition Security;
- iii. Livelihoods Improvement;
- iv. Agriculture-based and led economic development;
- v. Land and Tenure Security.

4.1. Food Security and Food Sovereignty

Food security is a situation where all people, always, have physical and economic access to sufficient, safe, and nutritious food to meet their dietary needs and food preferences for an active and healthy life. These conditions are underpinned by the “three pillars” of food security, being availability, access and affordability. The strategy will focus on the provision and assurance of food security while ensuring food sovereignty. The focus will be on intensive food production to meet household and national requirement and securing surplus for the Strategic Grain Reserve and Trade. Percentage of food secure rural households will increase from 85% in 2025 to 90% in 2030, whilst the percentage of food secure urban households will increase from 72% to 90% by 2030. The proportion of cereal production over national requirement will increase from 180% in 2025 to 183% by 2030. The proportion of beef production over national requirement will increase from 92% in 2025 to 141% by 2030 whilst the proportion of milk production will increase from 92% in 2025 to 115% by 2030.

4.2. Nutrition Security

Nutrition security is implied in food security, with the objective to ensure that the people of Zimbabwe consume food that is safe and has adequate nutritional value. Nutrition security will include reduction in childhood

wasting and stunting. The AFSRTS-2 will promote nutrition-sensitive interventions such as consuming naturally-biofortified foods, biofortification, nutrition gardens, traditional grains production and adopting sustainable nature-based production initiatives such as agroecology and integrated pest management. The proportion of stunted children under five years will decrease from 24% in 2025 to 20% by 2030, whilst the proportion of children consuming a minimum acceptable diet will increase from 12% to 25% by 2030. Prevalence of childhood wasting will decrease from 4% in 2025 to 3% by 2030 whilst the prevalence of childhood overweight will reduce from 6% in 2025 to 3% by 2030.

4.3. Improved livelihoods

To realise Vision 2030, the agriculture sector should contribute significantly to the improvement of livelihoods. The strategy will accelerate the implementation of Rural Development 8.0. The Vision 2030 Agriculture Livelihoods Tracker (VALT30/Pundutso30) will be implemented to track progress in the improvement of livelihoods. The VALT30 indicators will comprise, level of productivity, food and nutrition security, diversification of income sources, asset ownership, skills acquisition, adoption of new technologies, increased farm incomes, access to clean and safe drinking water, sanitation and hygiene. This entails that agriculture should be undertaken as a business. The strategy provides an opportunity to build the resilience of households, villages and communities to withstand future climate and economic shocks while improving livelihoods.

4.4. Agriculture-based and -led Economic Development

Zimbabwe has an agro-based economy. For the agriculture sector to transform the economy, there is need for the sector to grow and contribute between 12% to 20% of National GDP. Agriculture causes growth in the manufacturing sector, by providing at least 60% of its raw material

requirements, and consuming 43% of its manufactured products. Agriculture has a cause, co-factor and multiplier effect in economic development. A value chain and systems approach to agricultural interventions is, therefore, required. Aggregation, value addition and beneficiation must be part of modern agricultural investment. The target is for agriculture to contribute 12-15% of GDP, with agriculture-led value chains contributing another 3-5%.

4.5. Land and Tenure Security

Land holdings in Zimbabwe comprise; communal land (41%), Large Scale Commercial (2.8%), Resettlement (36.4%); National Parks and urban resettlement (15.2%) and State land (0.76%). The 33.3 million hectares arable land of the total land mass of the country's 39.6 million hectares should form a strong bedrock for the sustained accelerated social economic transformation of the country. The issuance of bankable, transferrable and registrable title for A1 and A2 farms and associated issuance of deed of grants for African purchase areas, and upliftment of endorsements for applicable indigenously owned land and BIPPA farms that are now gazzeted as state land should further ignite agricultural transformation and spur economic development.

5. VISION, MISSION, PILLARS, BROAD OBJECTIVES VALUES

Vision 2030

A prosperous and empowered Upper Middle-Income Society by 2030

Sector Vision

A viable, competitive, sustainable, inclusive and resilient agricultural sector by 2030

5.1. Pillars and Strategic Objectives

The Pillars form the basis for the broad and specific objectives of the AFSRTS2.

The strategy is anchored on the following broad objectives to be achieved by 2030:

Pillar 1: Enabling Policy, Regulatory and Coordination Environment

Strategic Objective 1: To create and sustain an environment for inclusive, transparent, predictable, pro-growth adaptive policy, regulatory and coordination mechanisms for agri-food systems transformation.

Pillar 2: Sustainable Production and Productivity.

Strategic Objective 2: To increase crop, livestock and fisheries production and productivity for sustenance of national food security, increased nutrition security, attainment of food sovereignty, and building a USD 15.8 billion agriculture industry gross value of production.

Pillar 3: Research, Innovation, Technology and Modernization

Strategic Objective 3: To build a modern, technology- research-and innovation-driven agriculture sector for increased productivity, and improved viability and profitability, at every scale, from village to estate.

Pillar 4: Climate Adaptation, Mitigation and Resilience Building

Strategic Objective 4: To develop a resilient agriculture sector capable of adapting to increasing climate variability and shocks.

Pillar 5: Rural Industrialisation and Rural Development

Strategic Objective 5: To accelerate agricultural development for catalyzing industrialization and economic development.

Pillar 6: Investment and Finance

Strategic Objective 6: To mobilise public, private and development sector finance and investment for agri-food systems transformation and development.

Pillar 7: Markets and Trade Development

Strategic Objective 7: To enhance market access and promote domestic and trade for sustained transformation of sustainable and inclusive value chains.

Pillar 8: Enabling Infrastructure Development, Rehabilitation and Management

Strategic Objective 8: To establish modern production, storage, logistics and market infrastructure to support agricultural transformation.

Pillar 9: Land and Tenure Security.

Strategic Objective 9: To enhance land administration and security of tenure for improved agricultural production and economic development, peace and territorial integrity.

Pillar 10: Building Internal Capacity to Deliver Transformation

Strategic Objective 10: To develop dynamic human resources, and robust infrastructure and systems, to deliver agriculture and food systems transformation.

5.2. Values

The values that will guide the implementation of the Strategy are:

- **Innovative**-continuous creativity-led and creativity-driven improvement, from ideation to cost-efficient implementation of programmes and projects;
- **Collaborative**-promoting inclusive stakeholder cooperation to facilitate increased production and productivity.
- **Reliable nurturing** a culture of trust, dependability, endurance and predictability for accelerated transformation of the agriculture sector.

5.3. Specific Objectives

The AFSRTS 2 will be anchored on the following specific objectives, which are linked to broad strategic objectives and their associated pillars.

5.3.1. Enabling Policy, Regulatory and Coordination Environment

Broad Objective 1: To create and sustain an environment for inclusive, transparent, predictable, pro-growth adaptive policy, regulatory and coordination mechanism for agri-food systems transformation

Specific Objectives:

SO 1.1: To create, nurture and sustain a policy environment of participatory and inclusive agricultural development and WASH sector

transformation to spur livelihoods improvement, industrialisation and economic growth.

SO 1.2. To review agricultural legislation and regulations to facilitate sector growth and alignment with global, continental and regional policy frameworks.

SO 1.3: To establish a robust data and analytics and monitoring, evaluation and learning system for the transformation of the agriculture sector.

SO 1.4: To Establish an Extension Services Quality Assurance Framework to enhance accountability and improve productivity.

SO 1.5: To nurture an environment for improved and inclusive sector governance.

SO 1.6: Streamline levies into a single reduced-rate export tax.

5.3.2. Sustainable Production and Productivity

Objective 2: To increase crop, livestock and fisheries production and productivity for national food and nutrition security, and for strengthened food sovereignty, and to build a USD 15.8 billion agriculture gross value.

Specific objectives

SO 2.1: To increase maize production from 2.4 million MT in 2025 to 3 million MT (against an annual requirement of 2.2 million MT) and increase yield from 1.25t/ha to 1.7t/ha by 2030.

SO 2.2: To increase traditional grains production from 634,650 MT in 2025 to 797,000 MT (against an annual national requirement of 550 000 MT) and increase yield levels of sorghum from 0.6t/ha to 0.8t/ha, and pearl millet from 0.38t/ha to 0.6t/ha by 2030.

SO 2.3: To increase wheat production from 563,292 MT in 2024 to 1 388 000MT against an annual national requirement of 360,000, and increase yield levels from 4.7t/ha to 6 t/ha by 2030.

- SO 2.4:** To increase citrus production from 288,776 MT in 2024 to 482,000 MT by 2030.
- SO 2.5:** To increase oliviculture production from 539,620 MT in 2025 to 2,133,000 MT by 2030.
- SO 2.6:** To increase sunflower seed production from 796 MT in 2025 to 1100 MT by 2030.
- SO 2.7:** To increase traditional grains seed production from 3,983 MT in 2025 to 5,199 MT in 2030 for sorghum, from 410 MT in 2025 to 900 MT in 2030 for millet.
- SO 2.9:** To increase sunflower production from 38,676 MT in 2025 to 161,000 MT by 2030.
- SO 2.10:** To increase cotton production from 61,289 MT in 2025 to 287,000MT by 2030.
- SO 2.11:** To increase sugarcane production from 6.7 million MT to 8.3 million MT by 2030.
- SO 2.12:** To increase tobacco production from 355 million Kg in 2025 to 500 million Kg by 2030 .
- SO 2.13:** To increase macadamia nut production from 51,506 MT in 2024 to 70,000 MT by 2030.
- SO 2.14:** To increase avocado production from 109 800MT in 2024 to 187,000 MT by 2030.
- SO 2.15:** To increase blueberry production from 8,580 MT in 2024 to 19 000MT by 2030.
- SO 2.16:** To increase the national cattle herd from 5,741,397 cattle in 2024 to 6,658,262 cattle by 2030.
- SO 2.17:** To increase the national goat herd from 5,061,142 goats in 2024 to 5,713,483 goats by 2030.
- SO 2.18:** To increase the national pig sow herd from 153,773 sows in 2024 to 256,406 sows by 2030
- SO 2.19.** To increase indigenous chicken production from 18,095,637 chickens to 35 212 500 by 2030

SO 2.20: To increase broiler production from 205,880 MT in 2024 to 362 000MT in 2030 against an annual national requirement of 280,000 MT.

SO 2.21: To increase milk production from 114,699,440 litres in 2025 to 200, 764,297 litres by 2030.

SO 2.22: To increase fish production from 31,296 MT in 2024 to 35,697 MT by 2030.

SO 2.23: To increase crocodile production from 65,530 skins to 77,000 skins by 2030.

SO 2.24: To increase egg production from 87 million dozen in 2024 to 145 million dozen by 2030.

SO 2.25: To Increase sheep production from 746,277 in 2024 to 1 million sheep in 2030.

SO 2.26: To clear tsetse in 3500km² of settled area by 2030.

SO 2.27: To develop holistic antimicrobial resistance and One Health Framework.

SO 2.28: To reduce pre and post-harvest losses from 16.5% to 6% by 2030.

SO 2.29: To align the following 22 enablers for increased production- Finance, Irrigation, Water, Mechanization, Seed, Fertilizer, Chemicals, Power, Fuel, Markets, Farmer payments, Capacity building, Insurance, Policy and regulations, Coordination, Monitoring and evaluation, Land, Soil management, Migratory pests' control, Contracting farmers, Security on farms and Cloud seeding.

5.3.3. Research, Innovation, Technology and Modernisation

Strategic Objective 3: To build a modern, technology-research and innovation driven agriculture sector for increased productivity and improved viability and profitability at every scale, from village to estate.

Specific Objectives

SO 3.1: To improve capacity for research, innovation and technology-transfer systems to proactively respond to farmers' needs, farming systems and national agricultural requirements for sustained economic development.

SO 3.2: To establish and maintain state-of-the-art infrastructure to support research, education and innovation.

SO3.3: To facilitate coordination and increased public and private involvement in research, development, innovation and technology development.

SO 3.4: To accelerate modernisation of irrigation, mechanisation and farm infrastructure, and accelerate deployment of digital and modern ICT systems to improve efficiency and lower costs of production.

SO 3.5: To increase the mechanization index from the current 43% to 80% by 2030, through the acquisition by the Private and Public Sectors of 10 000 tractors (5 800 large and 4 200 smallholder), 40 000+ matching implements and increase combine harvesters from 400 in 2025 to 600 in 2030.

SO 3.6: To promote faster seamless research-education-extension-farmer knowledge transfer systems.

5.3.4. Climate Adaptation, Mitigation and Resilience Building

Strategic Objective 4: To enhance resilience building to mitigate and adapt to climate variability and shocks.

Specific Objectives

SO 4.1: To ensure 100% adoption of the sustainable intensive conservation agriculture model in the small-holder sector by 2028, and achieve 100% agro-ecological tailoring by 2026.

SO 4.2: To develop 496 000 ha of irrigation, from 221 094 ha currently, by 2030.

SO 4.3: To accelerate the establishment of Rural Development 8.0 projects for enhanced resilience of communities to climate vagaries.

SO 4.4: Accelerate completion of 9 dams using the 6.0 infrastructure model by 2030.

SO 4.5: To establish and strengthen early warning systems to anticipate agriculture related climate-induced extreme events.

SO 4.6: To disseminate localised agricultural weather and seasonal forecasting to farmers, and provide real time reporting of pests and diseases outbreaks.

SO 4.7: To increase the adoption of climate smart water saving technologies and interventions (roof tops, weirs, boreholes)

SO 4.8: To promote sustainable land management, integrated soil fertility management, sustainable grazing practices, reforestation, and afforestation that reduce erosion, enhance soil health and agricultural productivity, contribute to carbon sequestration, and restore degraded lands

SO 4.9: To preserve and use indigenous genetic resources to enhance the development of diverse, nutritious, and resilient crop varieties.

SO 4.10: To explore carbon credit options and climate risk insurance to support farmers against drought-related shocks.

SO 4.11: To fully operationalise Ward Drought Mitigation Centres by 2030.

5.3.5. Rural Industrialisation and Rural Development

Objective 5: To accelerate inclusive, agriculture-led rural development for socioeconomic upliftment of communities

Specific Objectives

SO 5.1: To expedite the implementation of Rural Development 8.0 project thus: Presidential Climate Proofed Input Scheme, Presidential Community Fisheries Scheme, Presidential Household Tick Management Scheme, Presidential Cotton Inputs Scheme, Presidential Poultry Scheme, Presidential Goat Scheme, Presidential Rural Development Programme, and Presidential Vision 2030 Accelerator Model.

SO 5.2: To enhance implementation of public and private sector Infrastructure 6.0 projects thus dam construction, hydroelectricity generation, portable water for communities, irrigation development, fisheries development and wastewater management.

SO 5.3: To resource the productivity booster kit scheme for smallholder farmers.

SO 5.4: To accelerate implementation of the crowd-financing value chain development model.

SO 5.5: To enhance aggregation, value addition and beneficiation through better Ministry, Departments and Agencies (MDA) coordination.

SO 5.6: To transform the Productive Social Investment Input Schemes into partial recoverable business investment schemes

SO 5.7: To adequately resource the Vision 2030 Agriculture and Livelihoods Tracker (V2030 Tracker/Pundutso30) to track and report upliftment of communities out of poverty.

SO 5.8: To build ward, district, provincial agro industrial value chains through a whole of government approach.

SO 5.9: To increase access to water from 88.4% in 2025 to 100% in rural areas by 2030.

SO 5.10: To increase access to sanitation from 77.1% in 2025 to 100% by 2030.

SO 5.11: To promote healthy living for increased productivity.

5.3.6. Investment and Finance

Objective 6: To mobilise public, private and development sector finance and investment for agri-food systems transformation.

Specific Objectives

SO 6.1: To lobby for the allocation of 15% of the national budget to agriculture (10%), water and sanitation (5%) development in fulfilment of Zimbabwe's international obligations.

SO 6.2: To create an enabling policy, legislative and regulatory environment, and institutions, for accelerated private sector investment.

SO 6.3: To facilitate the crowding in of development partner and philanthropic investment that is aligned to national policy imperatives.

SO 6.4: To explore innovative de-risking, and blended financing mechanisms.

SO 6.5: To strengthen the Joint Venture Farming Framework to guarantee investment security.

SO 6.6: To accelerate issuance, acceptance and use of new title deeds for collateral, capital raising and better security of tenure.

SO 6.7: To accelerate crowd-financing models for agriculture.

SO 6.8: To facilitate for the introduction of incentives for export-oriented producers including IMTT waivers, VAT rebates, and tax holidays for certified exporters.

SO 6.9: To establish a Horticulture Finance Facility with concessional terms aligned to crop cycles (for example 2 years for annuals, 7+ years for plantations).

SO 6.10: To facilitate the collateralization of export receivables and warehouse receipts.

5.3.7. Markets and Trade Development

Objective 7: To enhance market access and promote trade for sustained transformation of sustainable and inclusive value chains.

Specific Objectives

SO 7.1: To establish Zimbabwe as an agro-processing hub for the region, away from a “food basket mentality” of raw produce supply and sale.

SO 7.2: To improve efficiency and competitiveness of agricultural input and output markets.

SO 7.3: To promote access and participation of farmers in domestic and international markets.

SO 7.4: To promote value addition and beneficiation of agricultural produce.

SO 7.5: To strengthen institutional frameworks to support agricultural marketing and trade.

SO 7.6: To upgrade markets, logistics and storage infrastructure to facilitate local, regional and international trade.

SO 7.7: To produce markets, economics and trade information and employ ICT to enhance market efficiency.

SO 7.8: To broaden “ease of doing business reforms” and “regulate for growth” reform to lower cost of trade, and improve market efficiencies.

SO 7.9: To enhance standards, quality, traceability, environmental, social and governance compliance through training of all producers.

SO 7.10: To prioritize negotiation of trade protocols for key markets such as China, India and South Africa.

SO 7.11: To develop a Zimbabwe Horticulture Export Branding Strategy focused on correcting global misconceptions and highlighting scale and quality.

SO 7.12: To Fast-track alignment with regional trade agreements to reduce tariff barriers.

5.3.8. Enabling Infrastructure Development, Rehabilitation and Management

Strategic Objective 8: To establish modern, production, storage, processing, logistics, and market infrastructure to support agriculture transformation.

Specific Objectives

SO 8.1: To adopt a business and value chain approach to agriculture development at every scale, from village to estate.

SO 8.2: To develop, rehabilitate and upgrade production, transport, logistics aggregation, beneficiation and value addition and market infrastructure to spur production, industrialisation and economic development.

SO 8.3: To develop modern urban agriculture markets and market infrastructure.

SO 8.4: To establish, through a whole of government approach, viable agro-industrial parks in rural provinces.

SO 8.5: To facilitate the development of export road corridors, to enable access to domestic and international markets.

SO 8.6: To implement and upscale a Hub-and-Spoke Cold Chain Model, in high-potential production zones.

5.3.9. Land and Tenure Security

Objective 9: To enhance land administration and security of tenure for improved production, economic development, peace and territorial integrity.

Specific Objectives:

SO 9.1: To institute policy and legislative changes for improved land

administration, governance, management and security of tenure.

SO 9.2: To increase capacity for modern land surveys.

SO 9.3: To establish multi-functional, inter-operational and multi-agency land information management and e-cadastre systems

SO 9.4: To improve Land Administration and Planning Capacity of Provincial, District and Ward level structures.

SO 9.5: To undertake institutional and regulatory reforms to enhance survey capacity.

SO 9.6: To expedite the issuance of transferable, bankable title deeds for A1, A2, and commercial farms.

5.3.10. Building Internal Capacity to Deliver Transformation

Objective 10: To develop dynamic human resources and robust institutions, infrastructure and systems to deliver agriculture and food systems transformation.

Specific Objectives

SO 10.1: To recruit, motivate, train and retain sufficient talent to drive agricultural transformation.

SO 10.2: To build modern resilient state of the art research, technology education and extension infrastructure to catalyse development.

SO 10.3: To build institutional capacity of MDAs to drive and sustain change needed to achieve agricultural transformation.

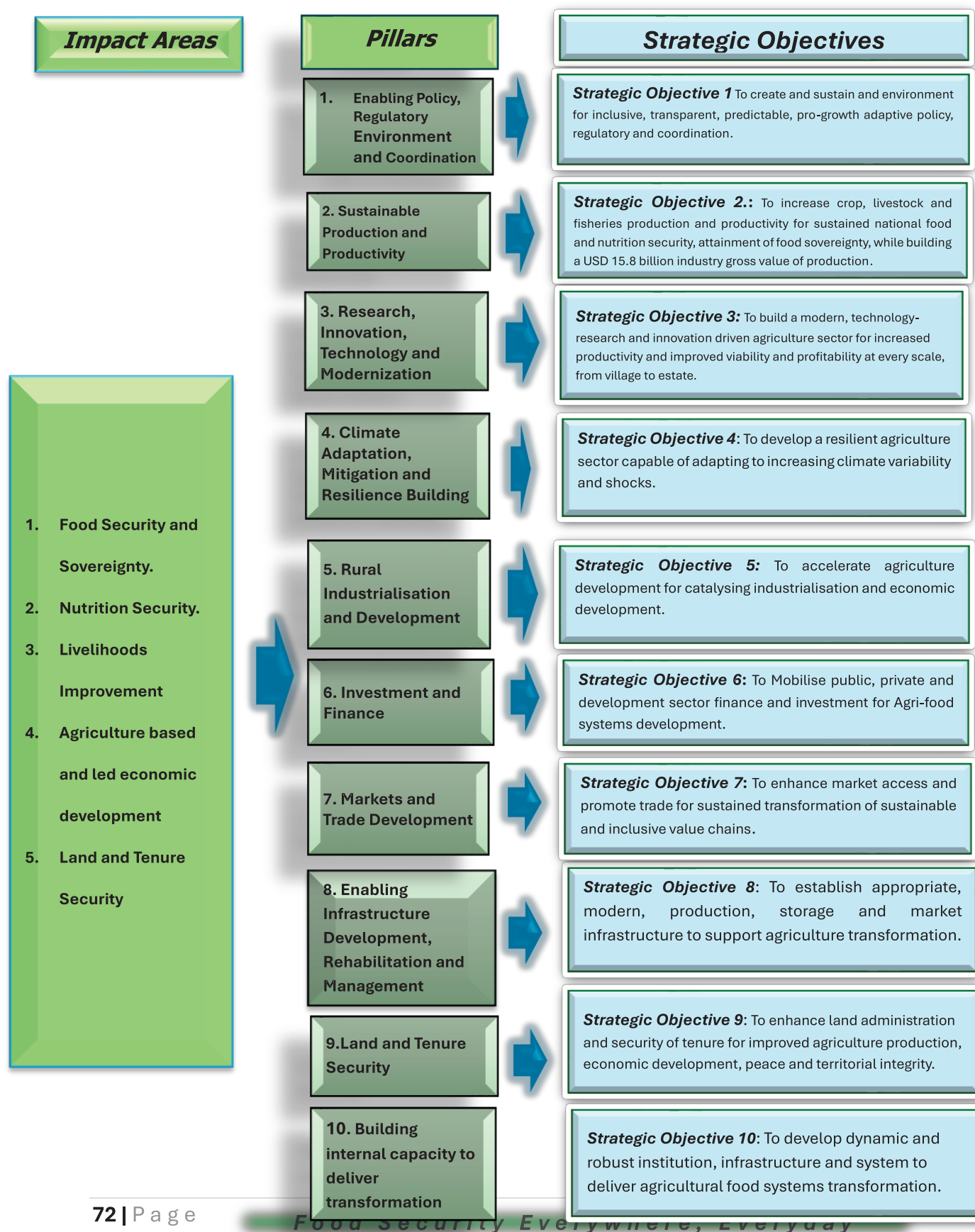
SO 10.4: To improve intra-sector and cross-sector coordination.

SO 10.5: To adequately resource the sector for transformation.

SO 10.6: To establish a robust monitoring and evaluation framework for measurement, learning and continuous improvement.

5.4. Conceptual framework

Figure 5.3. The Agriculture, Food Systems and Rural Transformation Strategy 2: Conceptual Framework

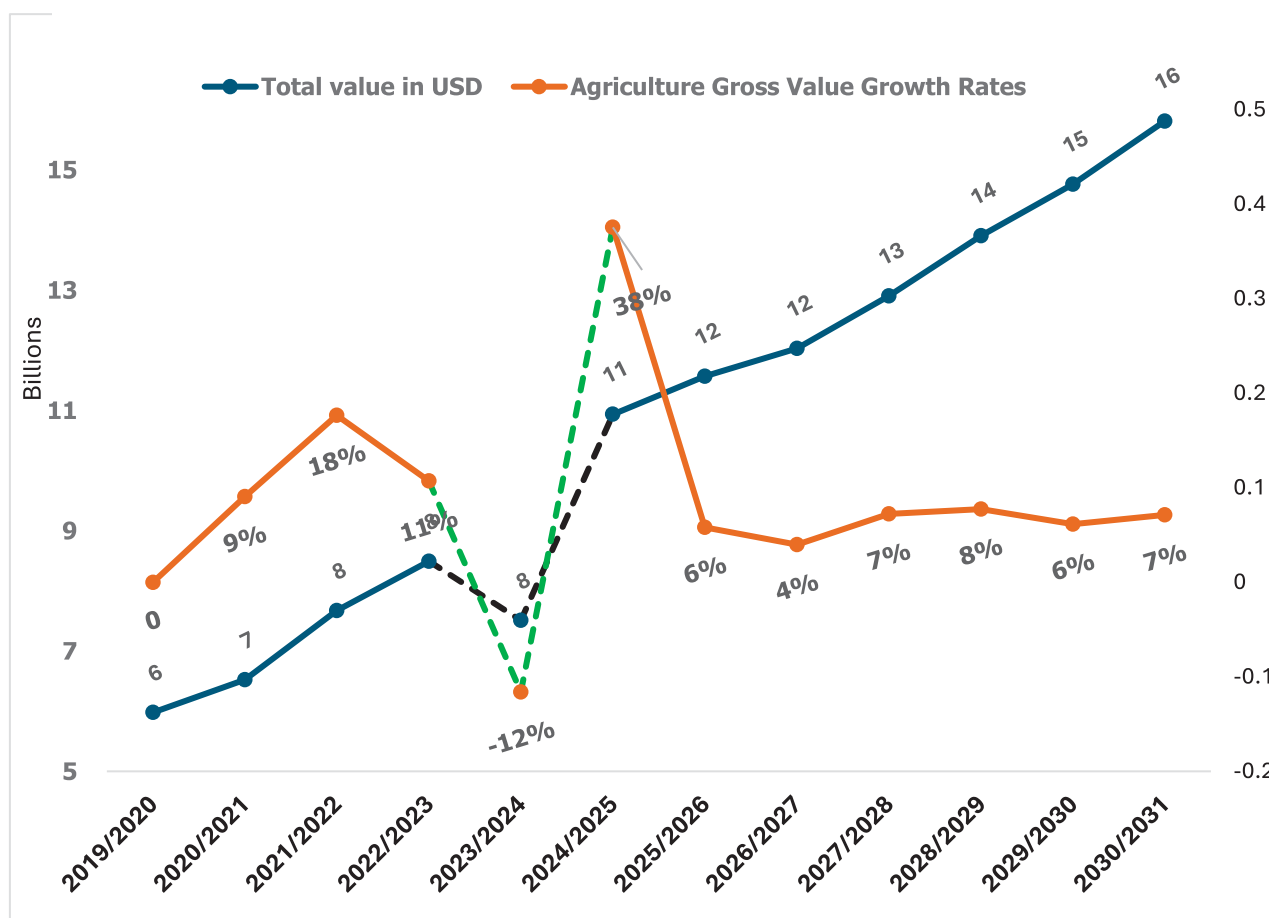


6. SECTOR GROWTH PROJECTIONS

6.1. Gross Value of Agriculture Production

The computation of the projected gross value of USD15.8 billion for agriculture is based on actual performance data for 2019-2024 derived from the Crop, Livestock and Fisheries Assessments (CLAFA) and projected (2024-2030) growth as evaluated for each of the 35 value chains. Fluctuations in growth rates are anticipated due to both systematic and idiosyncratic shocks. The assumptions are, therefore, sufficiently conservative. In some value chains, the investigation and establishment of new markets and new trade opportunities will drastically alter their growth projections. This is to be expected of a sector undergoing radical and bold transformation. The value chain specific gross values are in Annexure 1.

Figure 6.1. Projected Gross Value Growth Rates 2025-2030



6.2. Projected Consumption Patterns 2026-2030

Zimbabwe's population is projected to reach 17.2 million by 2030. The per capita maize consumption is currently 92.4 kg/per capita/year (2100kcal) down from 120kg/per person/per year, due to the growing demand for maize substitutes, both alternatives and alternates, such as traditional grains, bread, Irish potato, rice and pasta, for example. Beyond meeting staple food requirements, the demand for maize-dependent products is expected to increase due to industry expansion, population increase, and a growing livestock feed industry. Maize for feed currently constitutes 18% of the total maize produced. Export opportunities will also be explored in surplus years.

Consistent with the strategy to establish Zimbabwe as an agro-processing hub for the region, away from a “food basket mentality” of raw produce production and trade, many value chains will be selected for rural industrialisation.

Table 6.1. Projected Consumption Patterns 2026-2030

Commodity	Consumption per person per year(kg)	Project Self-Sufficiency Production Targets (MT):2025-2030					
		2025	2026	2027	2028	2029	2030
Projected Population		15,923,445	16,175,966	16,434,572	16,698,752	16,968,147	17,243,270
Maize	92.4	1,471,326	1,494,659	1,518,554	1,542,965	1,567,857	1,593,278
Rice	16	254,775	258,815	262,953	267,180	271,490	275,892
Soft Wheat	17.8	283,437	287,932	292,535	297,238	302,033	306,930
Traditional grains	13.2	210,189	213,523	216,936	220,424	223,980	227,611
Potatoes	8.04	128,024	130,055	132,134	134,258	136,424	138,636
Vegetables	7.2	114,649	116,467	118,329	120,231	122,171	124,152

Commodity	Consumption per person per year(kg)	Project Self-Sufficiency Production Targets (MT):2025-2030					
		2025	2026	2027	2028	2029	2030
Fruits	3.6	57,324	58,233	59,164	60,116	61,085	62,076
Beef	6.6	105,095	106,761	108,468	110,212	111,990	113,806
Fish products	4.8	76,433	77,645	78,886	80,154	81,447	82,768
Poultry	32.9	523,881	532,189	540,697	549,389	558,252	567,304
Eggs	9.69	154,298	156,745	159,251	161,811	164,421	167,087
Sugar beans	12.5	199,043	202,200	205,432	208,734	212,102	215,541
Sugar	14.6	232,482	236,169	239,945	243,802	247,735	251,752
Groundnuts	18	286,622	291,167	295,822	300,578	305,427	310,379
Milk litres (including own produced)	7.8	124,203	126,173	128,190	130,250	132,352	134,498
Rape	13.1	208,597	211,905	215,293	218,754	222,283	225,887
Cabbage	5.3	84,394	85,733	87,103	88,503	89,931	91,389
Tomatoes	14.4	229,298	232,934	236,658	240,462	244,341	248,303
Goatmeat	18	286,622	291,167	295,822	300,578	305,427	310,379
Peas(incl. African peas)	17	270,699	274,991	279,388	283,879	288,458	293,136
Roundnuts	22	350,316	355,871	361,561	367,373	373,299	379,352

The per capita consumption per person data was computed from the ZIMTATS PICES report with a base year of 2017. The consumption is not expected to change significantly per person per year during the plan period.

Table 6.2. Projected Gross Value of Agriculture Production 2025-2030

Product	Unit	2025/2026		2026/2027		2027/2028		2028/2029		2029/2030		2030/2031	
		Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)
Maize Grain	MT	2,400,000	840,000,000	2,100,000	735,000,000	2,500,000	875,000,000	2,600,000	910,000,000	2,700,000	945,000,000	3,000,000	1,050,000,000
Sugar beans	MT	54,000	50,220,000	61,000	60,390,000	69,000	72,450,000	76,000	84,360,000	84,000	99,120,000	92,000	115,000,000
Soya Bean	MT	183,000	140,910,000	198,000	164,340,000	221,000	198,900,000	244,000	236,680,000	268,000	281,400,000	291,000	328,830,000
Sunflower	MT	91,000	67,340,000	103,000	77,250,000	117,000	88,920,000	132,000	101,640,000	146,000	113,880,000	161,000	127,190,000
Cotton	MT	218,000	69,760,000	227,000	72,640,000	242,000	77,440,000	257,000	82,240,000	272,000	87,040,000	287,000	91,840,000
Tobacco	MT	302,000	1,162,700,000	297,000	1,232,550,000	310,000	1,388,800,000	324,000	1,564,920,000	337,000	1,755,770,000	350,000	1,967,000,000
Citrus	MT	347,000	576,020,000	364,000	622,440,000	393,000	691,680,000	423,000	765,630,000	452,000	840,720,000	482,000	925,440,000
T. grains	MT	471,000	188,400,000	541,000	216,400,000	605,000	242,000,000	669,000	267,600,000	733,000	293,200,000	797,000	318,800,000
Groundnuts	MT	328,000	387,040,000	368,000	393,760,000	412,000	399,640,000	456,000	401,280,000	500,000	400,000,000	544,000	397,120,000
Sugarcane	MT	7,100,000	3,124,000,000	7,400,000	3,182,000,000	7,500,000	3,150,000,000	7,800,000	3,198,000,000	8,100,000	3,240,000,000	8,300,000	3,237,000,000
Coffee	MT	1,000	6,400,000	1,000	6,300,000	1,000	6,200,000	1,000	6,100,000	1,000	6,000,000	1,000	5,900,000
Blueberries	MT	11,000	48,400,000	12,000	51,600,000	14,000	58,800,000	15,000	61,500,000	17,000	68,000,000	19,000	74,100,000
Tea	MT	24,000	4,560,000	14,000	3,080,000	10,000	2,600,000	7,000	2,100,000	3,000	1,050,000	-1,000	-410,000
Wheat	MT	778,000	342,320,000	886,000	380,980,000	1,011,000	424,620,000	1,137,000	466,170,000	1,263,000	505,200,000	1,388,000	541,320,000
Olericulture	MT	1,196,000	657,800,000	1,453,000	682,910,000	1,623,000	649,200,000	1,793,000	609,620,000	1,963,000	569,270,000	2,133,000	533,250,000
Macadamia	MT	43,000	146,200,000	46,000	156,400,000	45,000	153,000,000	44,000	149,600,000	42,000	142,800,000	41,000	139,400,000

Product	Unit	2025/2026		2026/2027		2027/2028		2028/2029		2029/2030		2030/2031	
		Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)
Floriculture	Cuttings	193,000,000	10,402,700	224,000,000	11,832,128	251,000,000	12,993,156	281,000,000	14,255,200	304,000,000	15,113,556	334,000,000	16,272,925
Mango	MT	159,000	66,780,000	170,000	71,400,000	180,000	75,600,000	191,000	80,220,000	201,000	84,420,000	212,000	89,040,000
Cassava	MT	18,000	15,840,000	17,000	17,680,000	19,000	23,370,000	21,000	30,450,000	23,000	39,330,000	25,000	50,500,000
Banana	MT	373,000	100,710,000	393,000	94,320,000	413,000	86,730,000	433,000	77,940,000	453,000	72,480,000	474,000	66,360,000
African Pea	MT	42,000	96,600,000	47,000	103,400,000	52,000	109,200,000	56,000	112,000,000	61,000	115,900,000	65,000	117,000,000
Apples	MT	8,000	29,600,000	43,000	159,100,000	62,000	229,400,000	81,000	299,700,000	99,000	366,300,000	118,000	436,600,000
Kapenta	MT	7,000	21,000,000	7,000	21,000,000	7,000	21,000,000	7,000	21,000,000	7,000	21,000,000	7,000	21,000,000
Fish	MT	17,000	49,300,000	19,000	53,200,000	21,000	56,700,000	23,000	59,800,000	25,000	62,500,000	27,000	67,500,000
Crocodile	Skins	82,000	22,140,000	81,000	21,870,000	80,000	21,600,000	79,000	21,330,000	78,000	21,060,000	77,000	20,790,000
Sweet Potato	MT	941,000	235,250,000	1,100,000	275,000,000	1,300,000	325,000,000	1,500,000	375,000,000	1,800,000	450,000,000	2,000,000	500,000,000
Irish Potato	MT	735,000	338,100,000	797,000	366,620,000	848,000	390,080,000	899,000	413,540,000	950,000	437,000,000	1,000,000	460,000,000
Bambara Nuts	MT	97,000	79,540,000	105,000	86,100,000	118,000	96,760,000	131,000	107,420,000	144,000	118,080,000	156,000	127,920,000
Avocado	MT	130,000	98,800,000	143,000	108,680,000	154,000	117,040,000	165,000	125,400,000	176,000	133,760,000	187,000	142,120,000
Dairy	Litres	117,000,000	117,000,000	128,000,000	128,000,000	137,000,000	137,000,000	146,000,000	146,000,000	155,000,000	155,000,000	165,000,000	165,000,000
Beef	Tonnes	123,000	528,900,000	130,000	559,000,000	141,000	606,300,000	153,000	657,900,000	164,000	705,200,000	176,000	756,800,000
Poultry	MT	250,000	1,425,000,000	268,000	1,661,600,000	291,000	1,949,700,000	315,000	2,268,000,000	338,000	2,636,400,000	362,000	3,040,800,000
Small ruminants	MT	13,000	46,800,000	14,000	50,400,000	15,000	54,000,000	17,000	61,200,000	18,000	64,800,000	20,000	72,000,000
Pork	MT	25,000	85,000,000	25,000	82,500,000	28,000	89,600,000	30,000	93,000,000	33,000	99,000,000	36,000	104,400,000

Product	Unit	2025/2026		2026/2027		2027/2028		2028/2029		2029/2030		2030/2031	
		Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)	Agriculture Production	Value of Gross Production (USD)
Eggs	Dozens	98,000,000	392,000,000	110,000,000	440,000,000	120,000,000	480,000,000	123,000,000	492,000,000	137,000,000	548,000,000	145,000,000	580,000,000
TOTAL			11,571,000,000		12,032,000,000		12,903,000,000		13,904,000,000		14,761,000,000		15,813,000,000

6.3. Gross Value of Agricultural Exports

The gross value of agricultural exports will grow to over USD 1.6 billion, driven by tobacco exports of USD1.4 billion from 500 million kg by 2030. The identified strategic intent to establish Zimbabwe as an agro-processing hub, will spur exports of value-added exports.

Table 6.3. Gross Value of Agriculture Exports

Year	2025		2026		2027		2028		2029		2030	
Row Labels	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value
Albumin; Modified Starches	147,003	845,086	43,821	60,801	23,243	59,191	150,245	111,372	57,768	29,537	15,994	101,291
Animal Byproducts	462	67,967	411	36,148	210	28,138	-	-	2,117	1,616	842	8,086
Animal Feed	42,877,850	6,881,479	12,605,263	4,351,323	28,550,764	7,804,871	19,632,435	6,461,114	11,027,784	5,139,443	4,557,710	3,325,794
Beverages	11,488,762	4,847,765	5,251,223	2,593,930	4,969,259	2,440,783	13,836,895	5,264,674	37,818,329	11,082,710	15,247,170	6,512,272
Cereal Preparation	4,548,674	5,200,626	6,416,910	6,889,442	6,905,945	9,004,151	5,969,637	9,478,841	5,336,053	10,001,584	5,561,754	12,604,163
Cereals	9,027,178	3,539,986	6,677,282	8,530,302	2,532,196	3,029,208	5,438,913	5,291,771	4,404,565	4,122,930	14,311,411	16,338,609

Year	2025		2026		2027		2028		2029		2030	
Row Labels	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value
Cocoa & Preparations	15,980	51,765	3,800	27,008	90	267	2,224	32,552	2,601	38,255	1,021	13,236
Coffee, Tea, Spices	16,143,758	25,824,572	14,274,604	21,150,433	12,947,662	19,424,547	14,428,097	23,187,664	13,867,643	22,588,744	13,296,256	21,580,588
Cotton	31,797,421	36,898,312	23,213,581	26,497,661	52,322,903	79,911,576	21,447,652	41,318,816	19,519,101	31,829,385	10,369,943	15,635,815
Dairy; Eggs; Honey	2,235,341	3,456,327	2,578,803	3,637,974	2,366,582	3,271,494	3,818,651	5,056,989	2,721,212	4,202,524	9,296,283	15,958,466
Edible Fruits & Nuts	69,901,518	33,803,132	77,097,368	29,783,191	100,100,951	36,510,836	91,233,624	33,653,496	84,968,686	27,260,028	81,057,516	24,961,535
Edible Vegetables	6,263,542	7,078,323	3,968,651	6,236,649	3,157,733	4,665,290	3,911,753	3,743,813	3,213,623	3,365,725	3,204,271	3,511,182
Essential Oils	119,346	585,645	305,444	1,166,731	334,899	1,593,311	174,321	1,098,341	230,967	1,707,067	890,063	2,547,592
Fats & Oils	92,695	414,372	740,392	1,031,101	644,767	1,020,703	1,003,398	1,633,019	1,107,043	2,334,123	1,031,217	2,511,774
Fish & Seafood	3,209,158	6,046,613	1,492,503	2,535,411	349,169	555,955	329,735	1,351,909	22,960	55,311	513	3,211
Fish & Seafood Fish & Seafood	17,604	190,435	6,672	61,780	1,872	18,471	7,264	70,095	1,080	12,836	-	-
Fruit/ Vegetable Preparations	11,335,560	7,600,787	11,972,037	8,401,236	10,073,669	6,981,582	10,501,084	7,451,292	12,485,607	8,380,720	13,657,973	12,305,682
Lac, Gums, Resins	29,750	6,001	-	-	20,998	28,227	23,908	8,782	1	1	2,575,687	777,043
Live Animals	106,610	3,026,761	47,702	1,286,100	25,335	1,268,050	48,848	2,354,983	52,793	2,297,798	46,981	2,900,781
Live Trees & Plants	2,924,462	4,869,239	3,088,437	6,076,862	3,186,799	5,383,232	2,954,490	5,080,555	2,449,992	5,178,336	2,625,982	5,769,348
Meat & Edible Offal	724,384	2,202,721	292,816	1,248,555	264,949	285,176	87,401	111,749	6,002	259,355	3,166	123,945
Milling Products	1,363,435	697,015	3,283,781	1,806,019	7,327,049	4,566,335	4,403,318	2,700,496	2,923,237	1,783,392	2,871,978	1,685,773
Miscellaneous Foods	518,759	820,919	1,263,178	1,773,701	1,406,251	1,627,934	2,125,842	2,533,214	3,269,054	5,937,912	3,410,112	7,337,284
Oilseeds Grains	792,637	5,789,919	1,285,680	3,888,371	1,471,093	5,349,532	3,417,164	8,919,543	1,106,507	4,648,921	2,139,828	7,057,904

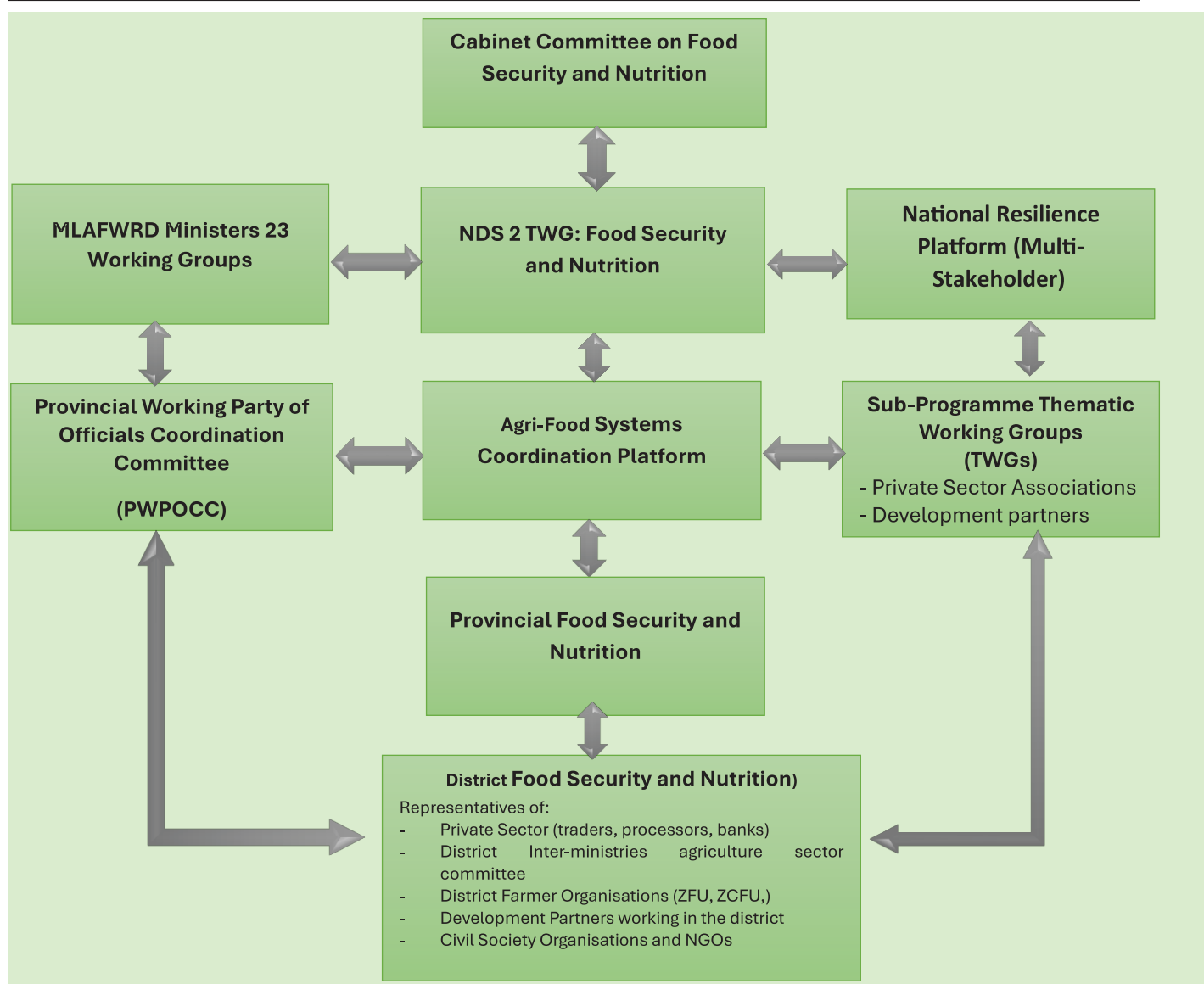
Year	2025		2026		2027		2028		2029		2030	
Row Labels	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value	Net Weight (Kg)	US Dollar Value
Prepared Meat/Fish	30,305	110,341	10,203	24,860	2,969	5,235	1,000	803	550	303	-	-
Raw Hides & Skins	1,447,749	32,436,633	1,356,310	30,990,061	2,219,230	30,697,356	1,829,321	25,673,754	2,206,836	36,583,354	2,362,355	35,282,020
Sugars & Confectionery	124,072,491	62,833,583	142,606,685	76,932,730	27,520,068	17,141,210	43,821,836	27,714,288	83,761,906	58,035,150	66,866,518	44,532,972
Tobacco	184,726,982	818,510,087	190,158,188	794,956,990	190,280,823	836,533,688	204,266,829	998,057,601	244,696,441	1,297,280,021	248,104,130	1,427,109,353
Vegetable Plaiting Materials	83,000	17,465	-	-	20,000	900	-	-	-	-	3	546
Vegetable Plaiting Materials Vegetable Plaiting materials	-	-	-	-	-	-	3,091,036	1,236,777	4,079,025	7,318,456	696,200	141,412
Total		1,074,653,877		1,041,975,369		1,079,207,250		1,219,598,303		1,551,475,537		1,670,637,675

7. GOVERNANCE AND INSTITUTIONAL ARRANGEMENTS

7.1. Governance and Implementation Framework

The governance and institutional framework for the Agriculture Food Systems and Rural Transformation Strategy 2 will utilise existing government, departments and agencies coordination structures. Strategy informs structure, staff and skills. Therefore, MDAs will be restructured to enhance delivery of the strategy. Coordination, collaboration and cooperation with the private sector will be enhanced. The MLAFWRD will be an actor and facilitator for AFSRTS2 implementation. A whole of government approach adopted during AFSRTS1 implementation will be entrenched. Fig 7.1 presents the Governance and Institutional Coordination and Implementation Framework for the AFSRTS 2.

Fig 7.1 Governance and Institutional Framework for the AFSRTS-2



7.2. The Role of State-Owned Enterprises and Parastatals in Agriculture Transformation

Parastatals and SOEs are vital implementing agents of the AFSRTS2 and NDS2 for the attainment of Vision 2030. AFSRTS 2, seeks to re-orient and realign parastatals and SOEs, directly and indirectly, to increase their outputs and amplify the impacts of their activities.

7.2.1. Agricultural Finance Corporation

The Agricultural Finance Corporation was resuscitated in 2021, to fill a perceived financing gap, in the post-reform era. With a land and development bank, a commercial bank, and leasing and insurance units, the AFC is adequately structured to play an increasingly important role of financing land reform beneficiaries, alongside other established willing banks. This financing should be accelerated in the title deed era, with the introduction of collateral-based lending. Government is providing facilitatory guarantees for AFC and other banks for lending mechanisation equipment, for irrigation development by A1 and A2 farmers, and is establishing a crop purchase buffer fund.

Now operating under Mutapa Investment Fund, AFC should expand the above services so that it can be the bank of choice for farmers. Additionally, AFC should play an increasing role in the distribution of inputs under various Presidential Schemes to enhance efficiency, while ensuring inclusive banking for over three million rural beneficiaries of Presidential Schemes.

The AFC is the urban land developer for government under the new government policy introduced in 2022. With an initial tranche of 11 000 ha, AFC should be able to raise some USD 500 million, to fund both working and capital outlay, tobacco localisation of financing and establishment of the crop purchase buffer fund – a dedicated fund to

assist treasury to smoothen cash flows so that farmers are paid timeously and within three days of delivery for their crop.

The Second Republic's revolutionary title deeds programme for holders of A1 and A2 permits and offer letters and leases; the upliftment of endorsements on qualifying BIPPA and indigenously owned farms; and issuance of deeds of grant to African Purchase Area farmers, announced in October 2024, should unlock further financing for agricultural transformation. AFC balance sheet will grow from USD 238 million in 2025 to USD 617 million by 2030.

7.2.2. Agricultural Marketing Authority

The Agricultural Marketing Authority (AMA) will regulate for growth, facilitate the establishment of provincial agro-processing hubs, support new urban agricultural markets, and seek financing for production and marketing, while availing timely agricultural statistics, and ensuring compliance with standards for sustained growth.

The new AMA will be ubiquitous in villages to drive RD8.0. Furthermore, AMA will be an invaluable link for ZIMTRADE outbound mission-scoping activities, whose results will have the "pull effect" for markets to inform agricultural production. Working with CSC, AMA, will establish fully functional livestock rural marketing points at Ward Drought Mitigation Centres. AMA will catalyse aggregation, value addition and beneficiation at ward, district, provincial and national agro-processing sites. The AMA balance sheet will increase from USD 101.9 million in 2025 to USD 122.3 million in 2030.

7.2.3. Agricultural and Rural Development Authority

The Agricultural and Rural Development Authority (ARDA), as the designated food, feed, oils and seed security agent for the nation, will produce 850 000MT of cereals annually. ARDA will increase the area under irrigation at its estates from the current 2500 ha to 25 000 ha by 2030. ARDA will establish rural development nodes, to act as rural development magnets along three primary value chains - maize, wheat and

soybean/sunflower - for value addition and beneficiation to produce food, feed and oils. This will spur rural industrialisation.

Through the Vision Incubator and Accelerator Model, a crowd funding model – predominantly from people on the waiting list for land locally (260 000) and abroad (10 000), and general citizens, ARDA will develop another 25 000 ha around dams using the Infrastructure 6.0. and the dam is an economy model, in the process of uplifting thousands out of poverty, for the attainment of Vision 2030. The ARDA balance sheet will grow from USD 250 million in 2025 to USD 1.2 billion in 2030.

7.2.4. Agricultural Research Council

The Agricultural Research Council (ARC) will strive to be the lead facilitator, chief co-ordinator, public affairs champion and indisputable leader in the agricultural research, development, innovation and technology transfer continuum. In addition, ARC will develop databases for researchers, projects, infrastructure and ancillary services for better coordination of national research and development in Zimbabwe. The ARC Balance sheet will grow from USD844 543 in 2025 to USD 1.02 million in 2030.

7.2.5. Cold Storage Commission

Now under Mutapa Investment Fund, this perennially under-performing SOE will be transformed to provide market access for the transformation of the predominantly rural livestock sector. Through its grazer scheme, a network of rural sales points, and being an “off-taker of last resort in drought years”, CSC used to be the “smoothing link” for sustained livestock growth. This enviable position must be one of the CSC aspirations and mandate.

7.2.6. Cotton Company of Zimbabwe

Now under Mutapa Investment Fund, a working COTTCO will ensure the transformative role of cotton in the rural economy for the upliftment of communities. COTTCO will continue to devolve its operations to establish the envisaged small rural aggregation and beneficiation centres in communities where cotton is produced to catalyse rural

industrialisation. Cooking oil and feed from cotton must be produced in villages, causing urban-rural migration. The COTTCO Balance sheet will grow from USD 68 million in 2025 to USD 199 million by 2030.

7.2.7. Grain Marketing Board

The Grain Marketing Board (GMB) is morphing into the grain supply chain manager for the nation - ensuring timeous inputs distribution, receiving local SGR on behalf of communities during surplus years, being a competitive buyer for the national SGR, ensuring state of the art logistics, storage and warehousing services for government and the private sector, and using its extensive depot network for commercial agri-services for the benefit of rural farmers, and stabilising food prices through appropriate market intervention. Equally, GMB's massive real estate must be sweated to generate the cashflow required to energise the transformation of the GMB into a full commercial entity, weaned from fiscus funding, by 2027. The GMB balance sheet will grow from USD 2.6 billion in 2025 to 4.2 billion in 2030.

7.2.8. Pig Industry Board

The Pig Industry Board (PIB) will be transformed to become the lead facilitator for the attainment of pork and pork products national self-sufficiency. A commercially viable PIB, in addition, will lead innovative pig breeds research and provide cost-effective feeds development, while capacitating growers and value chain actors for increased production, productivity and profitability. The PIB Balance sheet will grow from USD 4.5 million in 2025 to USD 5.8 million in 2030.

7.2.9. Tobacco Industry and Marketing Board

The Tobacco Industry and Marketing Board (TIMB) is regulating for the continued transformation of the tobacco sector. The TIMB will undertake extensive consultations to market the crop to international markets, emphasising environmental sustainability, quality styles and traceability. TIMB will undertake industry-wide pro-growth regulatory reforms to under-girdle sustained volume and value addition increases. The TIMB will

lead the coordination of the tobacco value chain transformation plan to localise financing of tobacco, increase value addition and beneficiation, while ensuring ethical, sustainable and traceable tobacco production in line with best international ESG practices.

The Tobacco Value Chain Transformation Strategy 2 will focus on the following areas: increasing production to 500 million kg by 2030; value addition and beneficiation of 100 million kg; localisation of financing for 50% of the crop; enhanced traceability and sustainability; policy, legislation and institutional reform; markets and market development; and de-risking through production of alternate crops. TIMB and TRB will co-drive this process. The TIMB Balance sheet will grow from USD 14 million in 2025 to USD 21 million in 2030.

7.2.10. Tobacco Research Board

The Tobacco Research Board's ideation, research, innovation, development and technology transfer footprint will expand to encompass potatoes, and industrial crops, and the provision of advisory and analytical services to a broader range of agricultural stakeholders, without diluting the core tobacco mandate. TRB will collaborate with DRESS and ARC, and like-minded institutes, to become a Technology Centre.

The Tobacco Transformation Strategy 2 will focus on the following areas: increasing production to 500 million kg by 2030, value addition and beneficiation of 100 million kg; localisation of financing for 50% of the crop; enhanced traceability and sustainability; policy, legislation and institutional reform; markets and market development and derisking through production of alternate crops. TIMB and TRB will co-drive this process. The TRB Balance sheet will grow from USD 61.7 million in 2025 to USD 134.3 million in 2030.

7.2.11. Silo Food Industries

Silo Food Industries, now under Mutapa Investment Fund, will transform from being a commercial entity for the generation of revenues for the GMB to a viable, cost efficient, competitive and profitable national mass-provider of affordable quality maize meal, salt, cooking oil, bread, sugar and soap. This enviable status is required to stabilise and moderate market prices.

7.2.12. Zimbabwe National Water Authority

The Zimbabwe National Water Authority (ZINWA) has been designated as the government water engineer mandated to deliver best water management practices and satisfy the varied national needs for affordable equitable and quality water requirements for agriculture, industry, mining and domestic use. The ZINWA Act is being amended to reflect this sea change. ZINWA will be present in each village, and at every irrigation scheme, and at each dam, and will be available to advise and audit local authorities water development plans. Wastewater management will be articulated more clearly in the Act for circular urban water management. The ZINWA balance sheet will grow from USD 3.2 billion in 2025 to USD 4.1 billion in 2030.

7.2.13. Zimbabwe Commodity Exchange

The GMB has a 25% shareholding of the Zimbabwe Commodity Exchange (ZMX). The ZMX is expected to facilitate price discovery and provide an alternative marketing channel for a broad range of crop, fisheries and livestock products as the most diversified agricultural marketing centre. It should raise capital, eventually, for farmers. The ZMX, as an alternative market, should be available from village to national level.

7.2.14. Farmers Development Trust

The Farmers Development Trust formed by government and the Zimbabwe Tobacco Association will be transformed to a commercially viable, short-term, training institution, providing vital bridging courses between structured certificate-oriented

learning and field and lay-farm field operations. The FDT balance sheet will increase from USD 9.2 million in 2025 to USD 9.3 million by 2030.

7.2.15. Zimbabwe Land Commission

The Zimbabwe Land Commission, as set out in Section 296 of the Constitution, has a fourfold mandate thus: ensuring accountability, fairness and transparency in the administration of agricultural land; conducting periodic audits of agricultural land; making recommendations to government on specified land matters; and investigation complaints and disputes regarding supervision, administration and allocation of agricultural land. It is therefore, to be expected that the ZLC will continue to work very closely with the MDAs charged with administration of the land to reduce disputes/complaints, enhancing land administration, and making recommendations to improve land governance and administration. With a Comprehensive Land Audit in place, in an era of title deeds for A1 and A2 farmers, the ZLC's periodic audits should increasingly inform policy to increase production and productivity.

7.3. Agriculture as a Business at Every Level and Every Scale

For the success of AFSRTS2, an agriculture as a business mindset will be cultivated, at all levels, leaving no one and no place behind, and in every value chain. The delivery of the sectors' ambitious targets under AFSRTS 2 will be spearheaded, coordinated and driven by the MLAFWRD. A talent pool of sufficiently trained and motivated specialists will daily deliver the AFSRTS2 at the highest level.

Names and medals matter - as symbols of recognition. The change of nomenclature from the AGRITEX Extension Worker to Agricultural Business Advisor, recently adopted by the MLAFWRD, is synonymous with agriculture as a business at every level – away from growing maize and selling surplus production, to growing “maize for sale to me and the world” – an elimination of the terminology of cash and staple crops. Cereals crops are commercial crops – to engage in growing cereals as a business and NOT for subsistence purposes – that is the business of producing to feed ourselves and others

– that production at every level and every scale is an economic activity. The “Kuinda kumunda, kuinda ku basa” philosophy will be the guiding heritage-based conceptual transformed framework of AFSRTS2. Talent and talent management are key for this transformation of the mindset, and transformation in practice.

Therefore, all farmers are in business. The AFSRTS2 should accelerate the transformation of all A2 farmers, some 23 500 farmers, to corporates. The 360 000 A1 farmers should be micro-to small enterprises, together with communal farmers. This is our national challenge.

7.4. Stakeholder Relations

Government’s role is to create an environment to accelerate private sector, and individual participation in the business of agriculture. Government also plays a critical role as an actor – providing financing for vulnerable people to engage in various agricultural and rural development activities. The agriculture-rural industrialisation-rural development-vision 2030 value stream requires a multi-stakeholder approach for its consolidation and implementation. Robust, yet agile and responsive multi-layered, multi-faceted public affairs and stakeholder consultative platforms will be nurtured, building on the successes of AFSRTS1.

7.5. Resource Mobilization Strategy

Resources will be mobilised from the public and private players and development partners. The private sector finances a large proportion of the value chains, while government intervenes in key food and nutrition security value chains.

The Government should allocate at least 10% of the national budget to agriculture, and a further 5% to water and sanitation, in line with the government’s international commitments to UN and AU frameworks.

Government’s RD8.0 paradigm is underpinned by the household food security imperative driven by the Pfumvudza/Intwasa scheme. Yields of maize and sorghum have more than doubled under this scheme, assuring households of food security.

During the Plan Period, a contributory scheme by households to the national SGR, in good rainfall years, through delivering a portion of their cereal/oil seeds harvest to government, will be pioneered. This will entrench the agriculture as a business paradigm.

