

## **THE CURRENT STATUS OF COMMERCIAL AGRICULTURE IN ZIMBABWE**

**FEBRUARY 2003**

### **EXECUTIVE SUMMARY**

This report describes the state of commercial agriculture in Zimbabwe as it stands in February, 2003. In particular it refers to the circumstances that affect members of the Commercial Farmers' Union directly. The report is divided into three parts and covers issues concerning land (Part A), commercial farm output (Part B), and production viability (Part C).

An update is given on the status of the fast track resettlement programme, and land distribution statistics for Zimbabwe are shown in a table. The current legal position on the land acquisition process is explained. Examples of incidents that have taken place on farms over the last month are included in an appendix to this document.

Under the existing Land Acquisition Act, no security is offered to commercial farmers and until now Government has reneged on agreements and rebuffed sincere attempts to resolve issues of contention. The CFU is concerned with the implementation of Government land policy, especially pertaining to "one-man, one-farm of limited size". Despite Government claims that the acquisition exercise is over, this is certainly not the case. As of February, 2003, listings of properties for acquisition by Government are still on-going, as witnessed by the gazetting of a further 341 farms since completion of the fast-track programme in August 2002. Moreover, the acquisition procedures are still being implemented in a lawless and disorderly manner, with illegal occupations, interruptions to production operations, theft of moveable property, and human rights violations continuing. The lack of enforcement of law and order is evident through existing laws being disregarded by politicians, government officials and the police alike. On the ground commercial farmers are still experiencing great difficulty trying to work with the police to resolve problems. In many cases, reports by farmers of illegal acts are ignored and perpetrators of crimes (sometimes heinous) are still not brought to justice.

Current land policies, combined with the lack of security and a collateral base for credit, have had a devastating effect on the production of virtually all commodities by all farmers. This is clearly demonstrated by a substantial drop in production of crops and livestock, as evidenced over the past three years. The commercial farming sub-sector has traditionally been the mainstay of raw materials and foodstuffs supplied to urban centres and a major contributor to the overall foreign exchange earnings of Zimbabwe. The haphazard implementation of land reform goes a long way to explain why critical shortages of basic food items and foreign exchange now prevail.

The few commercial farmers still on their properties are farming under extremely adverse economic conditions and financial viability is difficult to maintain in this continuing hostile environment. Overall production is discouraged by the absence of credit, erratic input supplies, soaring costs and price controls resulting from a continued lack of foreign exchange and the general implosion of the economy. Key input industries for agriculture also verge on collapse and others are operating at well below capacity due to a substantial contraction of their main markets, foreign exchange shortages, interruptions in the supply of raw materials, and price controls undermining their production ability.

Despite this bleak view of the current state of commercial agriculture in Zimbabwe, the recent resumption of dialogue between Government and the CFU should be viewed as the best chance of developing an acceptable way forward. A positive conclusion to these talks may see the finalisation of Government's contentious fast-track land reform programme, and act as a catalyst to spurring production in the national interest.

---

## THE CURRENT STATUS OF COMMERCIAL AGRICULTURE

FEBRUARY 2003

### A) LAND

- **Land Distribution**

The total commercial farming sub-sector comprised of 11,0 million hectares in September, 2001. The table below show that a significant portion of this area (some 3 million hectares) in that year was owned by organisations and persons who are not members of the CFU (eg. parastatals, government, indigenous commercial farmers, etc.).

#### ZIMBABWE LAND DISTRIBUTION BY SECTOR

SECTOR	HECTARES	%
1. Large Scale Commercial Sector	11 020 000	28.2
2. Small Scale Commercial Sector	1 380 000	3.15
3. Communal Area	16 350 000	41.8
4. Resettlement Area	3 540 000	9.1
5. Parks/Forest Land	6 339 000	16.2
6. ARDA (State Farming)	250 000	0.6
7. Urban Area	200 000	0.5
		100
<b>TOTAL</b>	<b>39 079 000</b>	

1. Large Scale Commercial Sector	
1a. Commercial Farmers' Union Members	8 595 000
1b. Indigenous Commercial Farmers Union	700 000 (approximately)
1c. Non members (either Union)	600 000 (approximately)
1d. Development Trust of Zimbabwe	332 000 (Government of Zimbabwe)
1f. Indigenous/Tenant Schemes/Leases	470 000 (Government of Zimbabwe)
1g. Cold Storage Company	211 000 (Government of Zimbabwe)
1h. Forestry Commission	112 000 (Government of Zimbabwe)

**TOTAL (LSC) 11 020 000**

	<u>HECTARES</u>	%
<b>STATE LAND</b>	<b>27 604</b>	<b>70.6</b>
<b>PRIVATE LAND</b>	<b>11 275</b>	<b>28.9</b>
<b>URBAN LAND</b>	<b>200</b>	<b>0.5</b>
	<b>39 079</b>	<b>100.0</b>

In April, 2001, Government introduced a second phase to their resettlement programme in a document titled "Land Reform and Resettlement Programme (revised) Phase II. The following criteria to be used in acquiring land are quoted directly from the document.

## Land identification and Acquisition

During Phase II of the Programme, land will be acquired compulsorily in accordance with the Land Acquisition Act as amended. The identification of land for acquisition for resettlement in the Land Reform and Resettlement Programme Phase II is guided by the following principles:

- Derelict land
- Under-utilised land
- Land under multiple ownership
- Foreign-owned land
- Land near Communal Areas

These principles are essentially administrative guidelines to assist land identification committees in carrying out their work. They are neither a legal requirement nor are they conclusive criteria for land identification.

Government will also consider the delisting of farms using the following guidelines:

- Plantation farms engaged in the large scale production of tea, coffee, timber, citrus fruit, sugar cane etc.
- Agro-industrial properties involved in the integrated production, processing and/or marketing of poultry, beef and dairy products and seed-multiplication.
- Properties with Export Processing Zone and Zimbabwe Investment Centre permits.
- Farms belonging to church or mission organisations.
- Farms belonging to foreign nationals who are protected by bilateral investment protection agreements.
- Approved conservancies.

The above guidelines will apply to the extent that technical evaluation of the farms concerned satisfies the relevant land identification committees as to their applicability.

(It is clear that Government has paid scant heed to these guidelines and is intent on acquiring all privately owned agricultural property. This manifests itself through statements to the effect that 11 million hectares have been or will be acquired and that the regular listing of farms for acquisition continues unabated).

### Swaps and Subdivisions

The Land Acquisition Act, will be amended, and provide for the acquisition of land by consent. Landowners can offer land in substitution for a farm or farms gazetted for compulsory acquisition. The responsibility is with landowners to present their offers of land to the relevant Provincial Land Identification Committee. This consent also covers landowners who wish to offer to Government, in substitution for the whole gazetted farm, a subdivided portion of that farm. Any such subdivision must conform with the Regulations prescribing maximum farm sizes (SI 288 of 2000). In any case, Government is not bound to accept any piece of land through the above arrangements where the land concerned does not satisfy its redistribution requirements.

(The Land Acquisition Act, has been amended, and sections 6A and 6B provide for the acquisition of land by consent. At this time many applications on the appropriate forms (LA1 or LA3) have been made by farmers wishing to sub-divide their properties and retain a portion with the rest being offered to Government. These have been lodged at the Ministry of Lands and Agriculture and require the Minister's consent and signature. To date the Minister has refused to sign any applications).

### • Land Acquisition

As of the 18<sup>th</sup> February, 2003, a total area amounting to 10,9 million hectares and comprising of 6365 title deeds had been gazetted for resettlement under section 5 of the Land Acquisition Act. Of this amount of land 985,000 hectares (535 title deeds – mainly indigenous owners) have been delisted leaving a net balance of 9,9 million hectares (5827 title deeds) still listed. Currently 4137 properties covering 8,9 million hectares have been subject to eviction notices (in terms of section 8 of the Act). Some 203 acquisitions have been confirmed by the Administrative Court so far, by mutual consent of both parties. The majority would best be described as trade offs endorsed by the Court. To the best of our knowledge only two acquisitions have been ruled in favour of the State.

- **Legal Status of CFU members' farms**

Amendments to the Land Acquisition Act in recent years have been subject to litigation in that they are in violation of provisions made for property rights in the Zimbabwe Constitution. Some cases have been decided in favour of our members while rulings on other cases are still pending. Thus the legal status of CFU members' farms is uncertain at this time. Although Government claims that the resettlement programme is now complete and 11 million hectares of privately owned land has been acquired this is under dispute.

The facts are that some properties exist in all of the following stages of the acquisition process:

- Illegally settled prior to identification for resettlement – no Sec.5 Notice;
- Illegally settled after Sec.5 Notice but before Sec.8 Order;
- Illegally settled under Sec. 8 Order before the expiry of the notice period inherent therein, and/or prior to the Confirmation of the Order by the Admin Court;
- Settled under Sec. 8 Order, awaiting confirmation of acquisition by the Admin Court – no Sec.7 Papers served;
- Settled under Sec.8 Order, served Sec.7 papers – some with set down dates, some no set down date as yet;
- Some Sec.5 and Sec.8 documents contain errors in specific detail and will in due course be declared invalid;
- Illegally settled despite delisting by Government (i.e. withdrawal of Preliminary Notice);
- Illegally settled in defiance of a court order;
- In a small minority of cases, acquisition has been finalised by the mutual agreement of the parties being incorporated into a final Order of the Admin Court; by confirmation of the State's application to the court; or by the owner conceding the land identified as required for resettlement.
- Amongst the small number of cases finalised as above, partial compensation for the improvements only is believed to have been agreed upon and paid out in some 134 cases.
- Amongst the properties listed there are those belonging to single farm owners, agro-industrial and plantation properties which in terms of stated policy are not required for resettlement.

In the light of this variety in situations, there is no justification whatsoever for any claim that the land acquisition process has been finalised, and in terms of the law and stated policy, finality is clearly a very long way away.

- **Percentage of farms closed down completely**

As of February, 2003, roughly 2300 members (or 73% of the total) are no longer carrying on farming operations on their properties. The estimate of the number of CFU members who are either fully or partly operational is somewhere between 800 and 900. A survey to clarify the position is currently being undertaken.

- **Compensation**

Some compensation has been paid out in 134 cases where farms have been ceded to Government. No other compensation has been forthcoming. A provision of 4,5 billion Zimbabwe dollars has been

included in the 2003 Government Budget for compensation for acquired properties. At current property valuations this amount is sufficient to cover the purchase price of roughly 30 farms.

### **OVERVIEW OF THE SITUATION ON FARMS IN ZIMBABWE DURING JANUARY/FEBRUARY 2003**

The situation on farms throughout the country continues to be fraught with problems and unlawful incidents.

The most common factors are as follows:

There is a continued issuing of preliminary notices of acquisition (Section 5) and Section 8 acquisition notices. This is in spite of Government's assurances that the acquisition programme was completed on 31 August 2002. See the Table below for farms gazetted from September 2002 to the present.

#### **FARMS GAZETTED FROM SEPTEMBER 2002 TO JANUARY 2003**

<b>Date of Gazette</b>	<b>GN No</b>	<b>No of farms</b>
6 September 2002	409	37
11 October 2002	530A	25
11 October 2002	530B	37
25 October 2002	541A	27
25 October 2002	541B	27
8 November 2002	574	29
8 November 2002	575	26
15 November 2002	583A	20
29 November 2002	610A	18
3 January 2003	1/03	11
3 January 2003	2	35
31 January 2003	37	31
<b>TOTAL</b>	<b>13</b>	<b>341</b>

LA forms, through which farmers concede parts of farms or even whole farms to Government, are still awaiting approval and signature by Government.

Throughout the country illegal evictions continue, with little police response. As a result crops already in the ground are being affected and often destroyed or lost. There is also rampant theft and destruction of irrigation equipment and other assets.

Livestock is under enormous threat, particularly in the south of the country where a serious drought is looming. Water supplies are dwindling, there is on-going theft and destruction of borehole equipment, grazing is becoming scarce and commercial herds are continually being interfered with by communal and settler herds. As a result Foot and Mouth Disease and other diseases are spreading. Stocktheft continues unabated, as does poaching of wildlife.

The overall picture is one of a continued lack of law and order throughout the country's commercial agricultural sector.

***For details of farm incidents occurring during January and February 2003, please refer to Appendix I. B) COMMERCIAL FARM PRODUCTION***

Commercial farming operations have been reduced substantially since the 1999/2000 season when fast track resettlement began. These developments have had, and will continue to have severe

repercussions on Zimbabwe's food security and foreign exchange earning ability in the short to medium term. There have been significant contractions in commercial crop areas planted and livestock numbers over the past three years.

## MAIN GRAIN CROPS

Grain production by commercial farmers with the exception of barley, has fallen substantially over the past three seasons and further reductions are expected in the 2003 season (See Table below).

1. **Maize:** Production has fallen from 810 000 tonnes in 2000 to an estimated 80 000 tonnes in 2003. Of major concern to producers is viability, theft and the seizure of maize kept on farms. This season production of seed maize has been severely disrupted and a shortage of seed will limit production next season.
2. **Sorghum:** Sorghum production has been fairly static although there is increased demand for sorghum as a stock-feed due to the shortage of maize. This year (2003) production would have been higher than the estimated 12 000 tonnes but farmers had difficulty sourcing seed. Sorghum is now being grown in traditional maize areas and on sandy soils as farmers look for alternative crops.
3. **Soyabeans:** Production has fallen from a record level of 162 000 tonnes in 2001 to an estimated 30 000 tonnes in 2003. In 2001 Zimbabwe was able to export around 20 000 tonnes of soyabeans. In 2003 Zimbabwe will have to import soyabeans because of the large production shortfall to meet requirements. There is no doubt that decontrol of soyabean marketing stimulated production. Shortage of seed could limit production next year. Note, crops grown using seed imported from neighbouring countries do not yield well in Zimbabwe.
4. **Groundnuts / Sunflowers:** Production of these two crops has fallen to insignificant levels. The few farmers growing these crops process and market them locally. Groundnuts have the potential of being an important export crop.
5. **Wheat:** Wheat production has fallen from 280 000 tonnes in 2001 to 115 000 tonnes in 2002. Production in 2003 will be limited by a shortage of water in dams and river systems, and lack of infrastructure (irrigation equipment). The marketing of wheat (being a controlled crop) will also not encourage the few farmers who have irrigation facilities to grow wheat.
6. **Barley:** Barley production has increased from 32 000 tonnes in 2000 and 2001 to 50 000 tonnes in 2002. The move into barley has been at the expense of wheat and farmers were able to negotiate prices. Most farmers who have irrigation facilities will grow barley instead of wheat if prices announced for the latter crop are unattractive. In 2002, barley prices were above \$100 000 per tonne while the GMB price for wheat was \$70 000 per tonne.

## PRODUCTION BY LARGE SCALE COMMERCIAL SECTOR (TONNES)

CROP	MARKETING YEAR			
	2000	2001	2002	2003 (e)
Maize	810 000	384 800	185 400	80 000
Sorghum	18 000	18 500	15 000	12 000
Soyabeans	145 000	162 000	65 000	30 000
Groundnuts	4 200	5 000	1 800	250
Sunflowers	3 000	2 000	600	400
Wheat	225 000	282 600	115 000	?
Barley	32 000	32 000	50 000	?

**PRODUCTION BY LARGE SCALE COMMERCIAL SECTOR (AREA (HA))**

CROP	MARKETING YEAR			
	2000	2001	2002	2003 (e)
Maize	200000	90000	50000	20000
Sorghum	8000	7000	4000	4000
Soyabeans	65000	70000	35000	20000
Groundnuts	1500	1500	500	100
Sunflowers	1000	700	300	200
Wheat	45000	5600	25000	?
Barley	8000	8000	12000	?

(e) Estimate

**COMMERCIAL FLUE CURED TOBACCO****Flue Cured Production in the Commercial Sector 2000- 2003E**

Year	No Of Grws	Area Ha	Mass M.Kg	Yield Kg/Ha
2000	1,738	76,497	229.5	3,000
2001	1,650	67,350	195.1	2,896
2002	1,400	56,000	154.0	2,750
2003E	510	21,500	60.0	2,790

**Notes**

After producing a record crop of 230 million kilograms, before the start of the land reform programme in 2000 flue cured production in the commercial sector has dropped significant (together with national production) as too many fully committed and productive commercial farmers have been forced to leave their farms. The industry at that stage was posed for massive growth along with the development of the fast expanding small-holder sector.

The remaining commercial farmers now farm on reduced hectares. Commercial farmers from 2002 have reduced their average hectareage from 47.0 to 40.0 hectares in 2003 as issues such as viability and forced reduction in farm size affected their planting. However the potential still exists for continuing commercial farmers, farmers off their farms waiting to return to suitable farms and the new commercial farmers to produce a high quality commercial crop in the region of +150 million kilograms in the 2003/04 season given the right environment.

**COMMERCIAL COTTON**

Total commercial hectareage grown to cotton this season was +/-1 000 ha which should produce roughly 2 000 tonnes. Since the national crop is very roughly estimated at +/- 250 000 tons (it is too early in the season for a more accurate estimate) the contribution of the commercial cotton sector to the national crop is less than 1%. This percentage has decreased from just over 20% over the last couple of years due to fast track resettlement.

Year	Hectareage	National Production	Commercial Production	%
1999	40000	303000	73000	24

2000	25000	353000	60640	17
2001	15000	337000	26000	8
2002	5000	195000	10000	5

This development has seriously jeopardized the national seed multiplication scheme as commercial farmers used to grow the lion's share of the certified, foundation and embryo seed for the country's requirements due to their ability to maintain the high standards required. Although Quton Seed Company has endeavoured to farm out the production of certified seed to small-scale producers and ARDA this season, the manpower needed to police this exercise is extremely costly, and in many instances standards have had to be relaxed to allow the seed crop to be grown. Commercial farmers are still solely responsible for growing the embryo and foundation crop as the industry cannot afford to allow standards to drop for these two stages of seed production.

The other main area of concern is research. In the past the Commercial Cotton Growers' Association has levied growers and sourced donor funding for an extensive and regionally recognized research program. An annual research report has been sent out to growers and industry players and extension field days held to take the results of the trials to the growers. The Association also managed on-farm trials for the Cotton Research Institute although this organization has failed to publish any research findings for many years. Sadly, last year the Association was forced to shut down its research section as many of the on-farm trial sites had been taken over for resettlement and funding was scarce due to the reduced number of cotton growers able to grow cotton. Recently the government-owned Cotton Research Institute was brought to a standstill by the reclaiming of the majority of its vital assets by its main donor – the Stabex Cotton Research and Training Trust (a fund set up by the European Union) – due to international sanctions on Zimbabwe. Quton Seed Company has started its own breeding and research program in an effort to keep cotton research in Zimbabwe going. The CCGA manages a large proportion of the Quton trials at the Cotton Training Centre in Kadoma.

Although last season commercial cotton growers were able to take advantage of an innovative new marketing system which allowed them to export their lint direct and earn foreign currency only a few of the farmers who were still able to farm this season elected to grow cotton. This was mainly due to the long growing period of the cotton crop and the security risk this posed as well as the draconian restrictions imposed on the foreign currency accounts in the new national budget.

The loss of income for the thousands of cotton pickers employed on an annual basis is another result of the land exercise. On a crop of +/-50 000 tonnes (which was grown commercially three years ago) at a picking price of +/- \$3/kg this results in a loss of +/- \$15 million in income. Although the Cotton Company of Zimbabwe and other cotton marketing companies are encouraging the growth of the small-scale cotton industry through input and credit schemes the overall hectareage planted to cotton this year was down on last year as many small-scale farmers elected to grow maize instead. The downstream effect of this is a loss of foreign currency earned for the country.

## COFFEE

Year	Hectares	Tonnes
2000	10 114	9 400
2001	8 300	8 800
2002	7 200	5 200
2003	5 112	5 200

The yield per hectare has increased because a large amount of replanting occurred after cyclone "Eline", and started bearing last year. However, there has been no replanting " since, and in the future there will be a decline in yield.

As this report is being written a further 400 ha of coffee has been pegged and two evictions have occurred.

**COMMERCIAL SUGAR CANE**

	<b>1999</b>	<b>Current - Feb 2003</b>
No. of farmers	91	50
Hectares of cane	7990	2803

*Note:* These figures are for Chiredzi/Triangle only and are based on farmers still resident on their farms and excludes numbers of farmers living elsewhere but still managing to farm.

**COMMERCIAL BEEF CATTLE**

Since the fast track land reform programme started in February 2000, CSO statistics show a disturbing trend in the commercial beef herd:

<b>Year</b>	<b>Females Bulled</b>	<b>Total Head</b>
1999	457000	1259000
2000	436000	1169000
2001	378000	1068000
2002	237961	708000

NB As at 31 March of the year in question.

The Cattle Producers Association believes that the level of destocking reached its peak in 2002 as the pressure on commercial farms in the form of harassment, extortion, and evictions. It is estimated that by year-end 2002 the total commercial beef herd had fallen below 200000 head.

Apart from the land issue, those producers still on the land face several major concerns:

**1. Weather / Grazing**

Although most areas have had varying levels of rainfall, the situation in the south and west of Zimbabwe is very serious. Grazing in these areas is virtually non-existent and there have been reports of widespread cattle deaths. The stockfeed crisis (availability and cost) offers little respite to a pending disaster.

**2. FMD Control**

DVS is experiencing difficulty in controlling the spread of FMD due to the increased movement of cattle as a result of:

- a) the worsening drought
- b) sale of cattle to raise funds to purchase food
- c) settlers moving cattle onto occupied farms.

There is therefore a need to vaccinate increased numbers of cattle in sensitive areas against FMD, with a forex requirement over 2 years of US\$15-20 million. RSA has offered assistance but the total requirement may be well out of reach.

**3. Price Controls/Marketing**

The determination of Government to impose price controls has severely dampened the market. Several major retailers have suspended trade in most beef products. The situation is unsustainable.

**DAIRY INDUSTRY**

The data given below indicates the trends since 1999.

	CIM	DC	HIC	OH	ANNUAL MILK INTAKE	NO OF PRODUCERS
1999	32296	10235	8016	13606	176	319
2000	29975	9392	7419	12257	168	318
2001	28321	8739	6913	10966	164	312
2002	20229	6718	4885	7634	142	285
2003					110 *	280 *
% DECREASE	37.4%	34.4%	39.0%	43.9%	37.5%	

\* Predicted

CIM = Cows in milk DC = Dry cows HIC = Heifers in calf OH = Other Heifers  
Herd information supplied by Central Statistical Office.

Data on Annual Intake, in millions of litres, and number of registered producers supplied by Dairy Services.

Statistics of the national herd varies according to the source of information. For example the N.A.D.F. carries out its own annual census and the data by animal category is in the range of 25-30% higher than that given by the C.S.O. However, the trends are comparable.

The main factors associated with the herd trends are:

1. **No security of tenure**  
Milk production is a capital intensive enterprise requiring constant reinvestment and with many producers under Section 8 Orders the lack of security of tenure is preventing the normal development and expansion on many dairy farms.
2. **Restrictions on the use of arable/grazing land**  
Traditionally most dairy farmers produce fodder crops such as maize silage and hay, and make optimal use of veld grazing. In many cases new settlers have prevented producers from carrying out their normal fodder production and utilization.  
  
The high cost of commercial stockfeeds coupled with sporadic shortages has had a major impact on the viability of milk production and the actual production levels on dairy farms for delivery to the formal processor.
3. **Price freeze**  
The price freeze is having a major effect on the viability of milk production because the processors are being restricted in paying producers a viable price. This is giving rise to a fast growing informal market which is of major concern as the milk is reaching the consumer without undergoing the regulatory tests to meet health requirements.
4. **FMD control**

The spread of FMD towards milk producing areas is another issue of concern. DVS are having difficulties controlling the spread of FMD and are not in a position to guarantee a long term vaccination programme to protect the dairy animals.

## COMMERCIAL POULTRY

The poultry industry in Zimbabwe, after a decade of growth, has started to decline over the past two years as indicated by day old chick production by the major commercial breeders.

Year	Pullets (Eggs)	Broilers (meat)
1998	3421500	38000000
1999	3159000	42150000
2000	3888200	42000000
2001	2639000	38055000
2002	2141000	33339000

>From 2000 to 2002, the production of pullets (for egg production) and boilers (for meat production) dropped by 45% and 20% respectively.

There are 2 major reasons for this trend:

1. Stockfeed availability and price
2. Price controls.

Since 2001 when the Government re-controlled the marketing of maize, poultry producers have been unable to legally source maize from anyone but the GMB. As the maize shortage has intensified, it has become virtually unobtainable locally. The landed cost of imported maize, and more recently, soyabean meal has pushed the cost of stockfeed up to unbelievable levels.

At the same time price controls, which were introduced in October 2001, have prevented producers from legally selling broilers at a price to at least recover costs. As a result many producers have ceased production. For the big producers this is also an unsustainable position.

## OSTRICH PRODUCTION

### Ostrich Numbers:

The production of ostriches (number of birds) produced in Zimbabwe has stayed more-or-less constant since 1998 (see table below).

Ostrich Production in Zimbabwe: - 1998 to present.

Year	No. Birds Slaughtered
1998	25517
1999	20875
2000	20374
2001	27761
2002	24209
2003 - predicted	26000

However, there are numerous concerns in the industry at present. These are as follows:

Number of Producers and Breeding Birds:

2-3 years ago Zimbabwe had 65 registered commercial ostrich producers. Today, there are 34 left. Generally speaking, the Land Resettlement Program, and other factors such as decreased profitability, has forced many smaller to medium-sized producers out of business. Luckily, many of the larger producers as well as the two ostrich marketing companies in the country have absorbed their birds and equipment. Despite this approximately 1000 breeders (approximately 15% of the country's breeders) were lost to Botswana (mainly) and South Africa last year through live-bird exports. Production of actual bird production numbers, however, does not seem to have been affected. This may be due to several factors such as increased production of the remaining ones. Given more conducive economic conditions, the ostrich industry in Zimbabwe would have grown significantly in the last 3 years or so but instead has just managed to maintain production.

#### Financial Considerations for the Producers:

The profit margin per bird to the producer has been significantly eroded over the last 2-3 years. This decrease in profitability has reached levels recently, where already established ostrich producers may be viable, but a new producer wanting to establish a start ostrich farming would find it only marginally viable. There are several reasons for this, the main one being the significant increase in the cost of feed, due to the shortage of basic stock feed components and the resultant need to import them. In addition, the price of most inputs has increased, relative to the return on the bird (this is due to producers buying inputs at parallel market foreign exchange rates and being paid out for produce at lower official exchange rates). (Other lesser contributing factors to the decreased profitability of ostrich production are the worldwide decrease in prices of ostrich skins as well as the weakened price for ostrich meat; these factors are basically beyond producers control in Zimbabwe).

Producers have also faced increasing financial pressures, with banks no longer allowing overdraft facilities, due to the land situation. This is particularly important for ostrich producers as they have significant time delays in getting paid for their ostrich meat, but more particularly, for their ostrich skins.

The introduction of the new budget with its 50% forex retention by the Reserve Bank of Zimbabwe, will further decrease the industry's profitability, and more-than-likely push more producers into non-viable situations.

### **C) PRODUCTION VIABILITY AND INPUT SUPPLIES**

#### • **Macroeconomic Environment that Commercial Farmers Operate in**

The fact that Zimbabwe's economy currently is in an advanced state of breakdown has been well publicised. This situation manifests itself in a number of ways. There are critical shortages of most major basic goods and a thriving black market for them. Year on year inflation rates first broke the 100% level in November, 2001, and exceeded 200% for the first time in January, 2003, reaching 208.1%. Price controls on some basic goods were first introduced in late 2001 and have been expanded to cover a whole range of items since then. These controls have had virtually no impact in arresting inflation. The inept manner in which they are administered results in goods being sold at below cost, and in turn this exacerbates shortages and drives up black market prices.

Hyperinflation is also driven by excessive government borrowing in money markets without due regard to revenue inflows. Substantial government budget deficits have occurred in recent years. Although monetary policy in the form of keeping interest rates low results in government's interest payment burden on a huge accumulated debt also being kept low, the policy does nothing to discourage credit creation and rein in inflation. There appears to be little political commitment to seriously address the problem despite past and present agreements reached between the three parties to the tri-partite negotiating forum (government, private sector, and labour) to curb government expenditure and to implement price and wage freezes.

Monetary policies in respect to exchange rates are also incompatible with proper measures designed to encourage exports, increase foreign exchange availability and bring about some control on black market rates which force up prices. Black market exchange rates for the US dollar are now around ZWD1500 against an official exchange rate of ZWD55. The latter has been held at the same level for

nearly two and a half years. The severely overvalued local currency has negatively impacted on the export sector for several years and contributed to a marked fall off of gross export earnings from USD 2,4 billion in 1997 to USD 1,4 billion expected for 2002. The slide has accelerated over the past two years because of the much reduced output of agricultural exports (most notably tobacco) by commercial farmers due to the fast track land resettlement programme. Traditionally this sub-sector has produced around 40% of Zimbabwe's total exports in value terms. The acute shortage of foreign currency, which has become more pronounced recently, affects all sectors of the economy. Imports of both finished goods and of essential inputs have been severely curtailed. Zimbabwe is also unable to properly service its foreign debts resulting in the withdrawal of foreign credit lines. For political reasons donor support has also largely been withdrawn. All these factors result in Zimbabwe's balance of payments position presently being in a precarious state.

Thus the macroeconomic environment that commercial farmers operate in can only be described as hostile. Those members of the CFU who still remain farming on their properties face a variety of problems emanating from the inconsistent and inappropriate economic policies currently being adopted. These range from prices being announced for controlled commodities that do not cover costs, to very scarce inputs which can only be procured (if at all) at prices which result in financial losses being made. There is no doubt that a high degree of risk of financial losses is attached to production in an environment of hyperinflation. This factor, together with the absence of collateral value on land due to fast track resettlement policies, represent major obstacles to members when applying for credit to finance their operations. Many members still able to farm have had to downsize their operations either as a direct consequence of part of their properties being occupied by settlers or the reluctance of banks to provide sufficient credit.

- **Main Agricultural Inputs**

#### Commercial Farm Labour

The exact number of farm workers retrenched because of fast track resettlement is unknown. In a CFU census last August many farmers were no longer on their properties and therefore the statistics were not forthcoming. The size of the commercial farm workforce five years ago was around 330,000 and represented about 25% of Zimbabwe's total work force in formal employment. The current level is estimated at around 90,000 to 100,000. The average sized family on commercial farms five years ago was about 5 to 6 persons and the total population on commercial farms at the time was around 1.8 million persons. Since the initiation of farm invasions most of the farm workers retrenched have not secured alternative employment in agriculture and now swell the ranks of the unemployed in urban areas. It is estimated that the current overall unemployment rate in Zimbabwe is around 70%.

#### Fertilizer

All the main companies involved in fertilizer manufacture (Sable Chemicals, Zimphos, ZFC, and Windmill) have been and still are operating at well below normal capacity. Problems in securing foreign exchange to import raw materials (especially potash) have bedeviled the industry as well as the inability of NRZ to move them into the country timeously. The output of phosphates from Zimphos has been severely reduced by the inability of NRZ to move raw material from Dorowa Mine to the factory. The poor supply of raw materials to the fertilizer manufacturers has resulted in them running well behind schedule for months and thousands of tonnes of lost production has occurred. There was also a build up in the backlog of orders from commercial farmers this season, with many of them having to plant crops with insufficient fertilizer. The main fertilizer companies had commitments to meet orders through government tenders for input schemes to supply resettled farmers and the Delta, Cottco, and CFI input schemes. Much of the fertilizer output meant for the newly resettled farmers never reached the intended beneficiaries in time to be used on crops grown this season because of the problems described above and because some was diverted corruptly.

Sable Chemicals has and continues to operate below capacity due its inability to procure forex to import anhydrous ammonia from South Africa and its current output is around 50% of normal. The annual nitrogen problem this year was compounded by this constraint and the absence of imported urea in the market (the controlled price was set at below landed cost).

## Chemicals

Chemicals are not manufactured in Zimbabwe. Prices of chemicals have escalated rapidly this season due to the depreciation of the currency, which is sourced in the parallel market. In general there have been no critical shortages because of the much reduced commercial crop sizes. Chemical companies rationalised products supplied by them because of the severe difficulties in obtaining foreign exchange. However, where particular products have not been available there have been substitutes on the market.

## Seed

Farm invasions have had a major impact on the commercial seed production for all crops. Shortages of good quality seed were apparent prior to the current season as a spill over effect from the 2001/2 cropping year and it is envisaged that shortages will be much worse later this year due to a further contraction in seed production.

## Stockfeeds

The industry has been plagued by a shortage of locally produced ingredients (eg maize) and the need to import them at black market exchange rates that have depreciated significantly over the last year. Landed costs have been passed on to livestock producers in the form of much higher stockfeed prices. Viability problems have and are still confronting all sectors of the livestock industry as price controls on stockfeeds have largely been ineffective. More recently one company has not been able to source sufficient high roughage materials for manufacture, and this results in plant operating at well below capacity and sometimes being shut down. This position is not likely to ease until the next harvest and then only temporarily because of the much reduced sizes of relevant crops.

## Fuel

All sectors of the economy have been affected by erratic supplies of fuel, and the situation looks set to worsen as foreign exchange becomes more scarce over the next few months. The availability of forex is critical as money drives the procurement system. Deals with foreign suppliers like Tamoil of Libya, IPG of Kuwait, and Sasoil of RSA are highly dependent on payment schedules being met. Current supplies to the five main oil companies are around 30% of the 1999 level. The seventeen indigenous oil companies that have started business over the last few years are given preference by Noczim when fuel becomes available. Farmers have requested preferential treatment in the supply of fuel, so that land preparation for the next season is not prejudiced by a shortage of fuel.

## Tractors, Farm Machinery, and Irrigation Equipment

Because of the high degree of uncertainty prevailing in the commercial farm sector very little investment in farm machinery has taken place over the last couple of years. The industry survives on servicing equipment and selling spares. In the period October to December 2002 the total sales of new tractors by all dealers amounted to only eight tractors. Prior to 1997 sales of new tractors were around 1600 units per annum. Some companies are restructuring and closing branches in various centres as they no longer operate on a viable basis. The irrigation sector is similarly affected and very few new schemes have been developed recently. Many farmers evicted from their properties were forced to leave their irrigation equipment behind, which in many cases has been subsequently stolen or vandalised. This prospect has led to much equipment of all kinds being stored in towns.

According to a survey done in September 2002, just prior to the planting period for the 2002/2003 summer crop season, farm equipment to the value of at least \$23,0 billion had been seized, looted, or vandalised. Many of the commercial farmers to which the questionnaire was addressed had been evicted from their properties and were not available to estimate the value of movable property damaged or stolen. The figure shown, therefore, is probably significantly below the actual value of assets damaged or stolen. Roughly about a quarter of commercial farmers are still on their farms and carrying on farming operations. Some theft and damage to tractors and tractor drawn implements, and to vehicles has and still occurs and impedes the farming operations of those farmers so affected. However, of major concern is widespread theft and damage of irrigation equipment and stationary engines used for water supplies which has and is still taking place. There is no doubt that the interruptions to farming operations resulting from theft and damage to equipment will result in consequential losses for the farmers affected in the form of lower than expected output. This will only

become apparent at the end of the season. Possible compensation for this is currently being investigated. Insurance companies have ceased to provide cover for the theft of irrigation equipment.

### **C) PRODUCTION VIABILITY AND INPUT SUPPLIES**

- **Macroeconomic Environment that Commercial Farmers Operate in**

The fact that Zimbabwe's economy currently is in an advanced state of breakdown has been well publicised. This situation manifests itself in a number of ways. There are critical shortages of most major basic goods and a thriving black market for them. Year on year inflation rates first broke the 100% level in November, 2001, and exceeded 200% for the first time in January, 2003, reaching 208.1%. Price controls on some basic goods were first introduced in late 2001 and have been expanded to cover a whole range of items since then. These controls have had virtually no impact in arresting inflation. The inept manner in which they are administered results in goods being sold at below cost, and in turn this exacerbates shortages and drives up black market prices.

Hyperinflation is also driven by excessive government borrowing in money markets without due regard to revenue inflows. Substantial government budget deficits have occurred in recent years. Although monetary policy in the form of keeping interest rates low results in government's interest payment burden on a huge accumulated debt also being kept low, the policy does nothing to discourage credit creation and rein in inflation. There appears to be little political commitment to seriously address the problem despite past and present agreements reached between the three parties to the tri-partite negotiating forum (government, private sector, and labour) to curb government expenditure and to implement price and wage freezes.

Monetary policies in respect to exchange rates are also incompatible with proper measures designed to encourage exports, increase foreign exchange availability and bring about some control on black market rates which force up prices. Black market exchange rates for the US dollar are now around ZWD1500 against an official exchange rate of ZWD55. The latter has been held at the same level for nearly two and a half years. The severely overvalued local currency has negatively impacted on the export sector for several years and contributed to a marked fall off of gross export earnings from USD 2,4 billion in 1997 to USD 1,4 billion expected for 2002. The slide has accelerated over the past two years because of the much reduced output of agricultural exports (most notably tobacco) by commercial farmers due to the fast track land resettlement programme. Traditionally this sub-sector has produced around 40% of Zimbabwe's total exports in value terms. The acute shortage of foreign currency, which has become more pronounced recently, affects all sectors of the economy. Imports of both finished goods and of essential inputs have been severely curtailed. Zimbabwe is also unable to properly service its foreign debts resulting in the withdrawal of foreign credit lines. For political reasons donor support has also largely been withdrawn. All these factors result in Zimbabwe's balance of payments position presently being in a precarious state.

Thus the macroeconomic environment that commercial farmers operate in can only be described as hostile. Those members of the CFU who still remain farming on their properties face a variety of problems emanating from the inconsistent and inappropriate economic policies currently being adopted. These range from prices being announced for controlled commodities that do not cover costs, to very scarce inputs which can only be procured (if at all) at prices which result in financial losses being made. There is no doubt that a high degree of risk of financial losses is attached to production in an environment of hyperinflation. This factor, together with the absence of collateral value on land due to fast track resettlement policies, represent major obstacles to members when applying for credit to finance their operations. Many members still able to farm have had to downsize their operations either as a direct consequence of part of their properties being occupied by settlers or the reluctance of banks to provide sufficient credit.

- **Main Agricultural Inputs**

#### Commercial Farm Labour

The exact number of farm workers retrenched because of fast track resettlement is unknown. In a CFU census last August many farmers were no longer on their properties and therefore the statistics were not forthcoming. The size of the commercial farm workforce five years ago was around 330,000

and represented about 25% of Zimbabwe's total work force in formal employment. The current level is estimated at around 90,000 to 100,000. The average sized family on commercial farms five years ago was about 5 to 6 persons and the total population on commercial farms at the time was around 1.8 million persons. Since the initiation of farm invasions most of the farm workers retrenched have not secured alternative employment in agriculture and now swell the ranks of the unemployed in urban areas. It is estimated that the current overall unemployment rate in Zimbabwe is around 70%.

### Fertilizer

All the main companies involved in fertilizer manufacture (Sable Chemicals, Zimphos, ZFC, and Windmill) have been and still are operating at well below normal capacity. Problems in securing foreign exchange to import raw materials (especially potash) have bedeviled the industry as well as the inability of NRZ to move them into the country timeously. The output of phosphates from Zimphos has been severely reduced by the inability of NRZ to move raw material from Dorowa Mine to the factory. The poor supply of raw materials to the fertilizer manufacturers has resulted in them running well behind schedule for months and thousands of tonnes of lost production has occurred. There was also a build up in the backlog of orders from commercial farmers this season, with many of them having to plant crops with insufficient fertilizer. The main fertilizer companies had commitments to meet orders through government tenders for input schemes to supply resettled farmers and the Delta, Cottco, and CFI input schemes. Much of the fertilizer output meant for the newly resettled farmers never reached the intended beneficiaries in time to be used on crops grown this season because of the problems described above and because some was diverted corruptly.

Sable Chemicals has and continues to operate below capacity due its inability to procure forex to import anhydrous ammonia from South Africa and its current output is around 50% of normal. The annual nitrogen problem this year was compounded by this constraint and the absence of imported urea in the market (the controlled price was set at below landed cost).

### Chemicals

Chemicals are not manufactured in Zimbabwe. Prices of chemicals have escalated rapidly this season due to the depreciation of the currency, which is sourced in the parallel market. In general there have been no critical shortages because of the much reduced commercial crop sizes. Chemical companies rationalised products supplied by them because of the severe difficulties in obtaining foreign exchange. However, where particular products have not been available there have been substitutes on the market.

### Seed

Farm invasions have had a major impact on the commercial seed production for all crops. Shortages of good quality seed were apparent prior to the current season as a spill over effect from the 2001/2 cropping year and it is envisaged that shortages will be much worse later this year due to a further contraction in seed production.

### Stockfeeds

The industry has been plagued by a shortage of locally produced ingredients (eg maize) and the need to import them at black market exchange rates that have depreciated significantly over the last year. Landed costs have been passed on to livestock producers in the form of much higher stockfeed prices. Viability problems have and are still confronting all sectors of the livestock industry as price controls on stockfeeds have largely been ineffective. More recently one company has not been able to source sufficient high roughage materials for manufacture, and this results in plant operating at well below capacity and sometimes being shut down. This position is not likely to ease until the next harvest and then only temporarily because of the much reduced sizes of relevant crops.

### Fuel

All sectors of the economy have been affected by erratic supplies of fuel, and the situation looks set to worsen as foreign exchange becomes more scarce over the next few months. The availability of forex is critical as money drives the procurement system. Deals with foreign suppliers like Tamoil of Libya, IPG of Kuwait, and Sasoil of RSA are highly dependent on payment schedules being met. Current supplies to the five main oil companies are around 30% of the 1999 level. The seventeen indigenous oil companies that have started business over the last few years are given preference by Noczim

when fuel becomes available. Farmers have requested preferential treatment in the supply of fuel, so that land preparation for the next season is not prejudiced by a shortage of fuel.

#### Tractors, Farm Machinery, and Irrigation Equipment

Because of the high degree of uncertainty prevailing in the commercial farm sector very little investment in farm machinery has taken place over the last couple of years. The industry survives on servicing equipment and selling spares. In the period October to December 2002 the total sales of new tractors by all dealers amounted to only eight tractors. Prior to 1997 sales of new tractors were around 1600 units per annum. Some companies are restructuring and closing branches in various centres as they no longer operate on a viable basis. The irrigation sector is similarly affected and very few new schemes have been developed recently. Many farmers evicted from their properties were forced to leave their irrigation equipment behind, which in many cases has been subsequently stolen or vandalised. This prospect has led to much equipment of all kinds being stored in towns.

According to a survey done in September 2002, just prior to the planting period for the 2002/2003 summer crop season, farm equipment to the value of at least \$23,0 billion had been seized, looted, or vandalised. Many of the commercial farmers to which the questionnaire was addressed had been evicted from their properties and were not available to estimate the value of movable property damaged or stolen. The figure shown, therefore, is probably significantly below the actual value of assets damaged or stolen. Roughly about a quarter of commercial farmers are still on their farms and carrying on farming operations. Some theft and damage to tractors and tractor drawn implements, and to vehicles has and still occurs and impedes the farming operations of those farmers so affected. However, of major concern is widespread theft and damage of irrigation equipment and stationary engines used for water supplies which has and is still taking place. There is no doubt that the interruptions to farming operations resulting from theft and damage to equipment will result in consequential losses for the farmers affected in the form of lower than expected output. This will only become apparent at the end of the season. Possible compensation for this is currently being investigated. Insurance companies have ceased to provide cover for the theft of irrigation equipment.

## APPENDIX I

## AN OVERVIEW OF INCIDENTS OCCURRING ON FARMS IN ZIMBABWE DURING JANUARY AND FEBRUARY 2003

**SITUATION REPORTS – MATABELELAND NORTH, Week ending 24 January 2003**

<b>FARM NAME</b>	<b>OWNER</b>	<b>DISTRICT</b>	<b>INCIDENTS</b>
Stunula Ranch	C Jarret	Nyamandhlovu	Denied access to farm and cattle. 700 head of cattle being stolen.
Glencarrough	M Wood	Nyamandhlovu	Cattle dying due to lack of grazing and water Forced off property, occasional ZRP escort. 350 head of cattle dying due to lack of grazing and water.
Tandarani	J Sankey	Nyamandhlovu	Stock theft occurring. Forced off property. Chief CIO officer for Matabeleland North evicted owner. Crops and assets continue to be stolen. Property is the largest vegetable growing enterprise in the province. The following is being removed and sold by the settlers: 400 tonnes sweet potatoes, onions, fertiliser, workshop equipment, irrigation piping, electronic motors, crates and tomatoes.
Chimwana	R Stirling	Gwaai	Threats continue daily. All safaris have been abandoned. Game being decimated. Interruptions continue with management at Half Way House Hotel.
Satani	T Kendle	Gwaai	Forced off property. All safaris have been abandoned. Game being decimated. Stripping of assets. Buffalo herd of 200 destroyed. Veterinary Foot and Mouth fence non-existent.
Paddy's Valley	C Wilde	Inyathi	Forced off property. Game being decimated. Police escort being denied. Local settler leader threatening owner with death if found on the farm.

**SITUATION REPORTS – MATABELELAND SOUTH, Week ending 24 January 2003**

River Ranch	S Wheeler	West Nicholson	Forced off property. Citrus and mango crop stolen. Game being decimated. Orchards dying as trees not being watered. Homestead and outer buildings being vandalised. Minister Mohadi has taken over orchards and building claiming them for himself.
Barbertsi	G Barber	West Nicholson	Has access but wildlife destruction continues. Several Black Rhinoceros killed. Many giraffe snared. Safaris cancelled.
Jopempi Farm	I Ferguson	Beitbridge	No hunting allowed.

Two hunting lodges occupied.  
Over \$30 million worth of assets stripped.  
Destruction to wildlife.  
No water allowed to be pumped for wildlife.

### **SITUATION REPORTS – MATABELELAND NORTH, Week ending 31 January 2003**

Lion Ranch	B de Vries	Gwaai	Group of 15 including two ZRP officials followed owner to his ranch. Surrounded him and pressed him against his vehicle, abusing him. Two policemen joined in the verbal abuse. Group demanded he leave the farm immediately. One individual falsely claimed to be the DA Mr Ndebele.
------------	------------	-------	---

### **SITUATION REPORTS – MATABELELAND SOUTH, Week ending 31 January 2003**

Garths Farm	G Robertson	Figtree	Settlers tried to extort \$75,000.00 for maize eaten by cattle. Cattle gained access through the fence where settlers had removed fencing.
Bulembi Farm	J Goddard	Shangani	Continued harassment from DA at Filabusi who wants to move into Bulembi, Fort Rixon irrigation farm. Threatened if not given Orangedale farm would evict the owner from Pezulu farm.
Twin Rivers	S Wheeler	Beitbridge	Oranges and mangoes stolen from orchard amounting to \$80 million. Settlers have been relocated to other sites by Minister Mohadi.
Angelsea	I Putallo	Matobo	Arrested on 25/01/03 for Section 8 violation. Released Monday 27/01/03. Prosecutor withdrew case. Tuesday 28/01/03 two heavy vehicles arrived and offloaded 34 head of cattle. Farm manager collected cattle then drove them to Matobo ZRP to report incident, only to find on arrival that ZRP had already started to process stock theft docket against him. It is alleged the Governor of Matabeleland South is driving the attack as there is a lodge known as Amalinda Lodge on the property. Advances made last year by Governor were rebuffed by the owner.

### **SITUATION REPORTS – MATABELELAND SOUTH, Week ending 7 February 2003**

Tamba Lodge	P Darlow	West Nicholson	Owner was visited by delegation on Sunday 2/02/03 and told to vacate as the new owner wanted to take up residence.
Angelsea Farm	I Putallo	Matobo	Manager charged with malicious damage to property and unbecoming behaviour for dismantling a loading ramp used to offload 34 head of cattle. Veterinary Department refusing to prosecute settlers for 34 tick-infested cattle.

### **SITUATION REPORTS – MATABELELAND NORTH, Week ending 14 February 2003**

Tandarani	J Sankey	Nyamandhlovu	ARDA (Agricultural and Rural Development Authority)
-----------	----------	--------------	---

have moved onto the property.  
 ARDA alleged to be removing onion sets and replanting on Bolu Estate.  
 ARDA have taken over one tractor and roam disc.  
 ARDA emptying diesel bulk tanks of 6000 litres into drums.  
 Fuel being stolen.  
 2000 crates of onion sets stolen have potential of producing a crop worth \$120 million.  
 The farm office's contents valued at \$15 million have been burnt to the ground.  
 Contents of sheds valued at \$200 million are being emptied including 70 tonnes of fertiliser, electric motors, spares and equipment.  
 CIO operative known as Chibaya has taken over one property. Another three properties taken over by ARDA.  
 ARDA now growing sugar bean crop with the stolen farm equipment.

### **GENERAL**

In West Nicholson district Section 8 orders have been issued to six farmers. Ten preliminary notices gazetted for the province on 31/01/03. Destruction to wildlife continues unabated. Stocktheft occurring more frequently. Theft of equipment and assets rapidly rising. Serious grazing restrictions. Very serious drought looming.

---

### **SITUATION REPORTS – MANICALAND, Week ending 31 January 2003**

Farm 33	R Durham P Menie	Middle Sabi Middle Sabi	Lost between \$60-80 million worth of mangoes. Lost 20 hectares of citrus. Mr Gata has also taken 5 hectares of leechies.
Farm 39	K Stirrup	Middle Sabi	Lost 80 hectares of citrus, oranges and grapefruit.

### **GENERAL**

Settlers have taken irrigation pipes. They were asked to sign for the pipes but have declined to do so. Problem with Mr Patrick Majuru who is a ZFTU representative based in Mutare. He is busy instigating labour. All farmers with the exception of three were delivered Section 8 notices. Most of the farmers have a Memorandum Agreement signed by Minister Made to grow soya beans.

Tana Farm	R Burl	Headlands	Farmer told he can only farm until end of the year when the farm will be acquired to build a dam.
Causeway Farm	R Burl	Headlands	As above.
Nyamera Farm	B Gilpin	Headlands	As above.
Lot 10 of York	C Jones	Headlands	Farm being leased to Mr Retzlof. War veteran leader Miripiri apparently saying the farm is not allowed to be leased.
	R Finnaughty	Rusape/Makoni	Leasing farm from owner who is 79 years old and presently undergoing a hip operation. War veteran leader Miripiri apparently saying the farm is not allowed to be leased. The DA has given the lessee assurance that he can farm for the next three to four months. Lessee has 350 pedigree Brahmans on the farm.
Tsongwesi	Mr Herrer	Nyasura	Domestic problems. Domestic assaulted an old lady. Referred to Ministry of Labour - no success.

Premier Estate	Mr Truscott	Mutare	Referred matter to CIO - under investigation. Owner removed off property two years ago. ZFTU Mr Muchowana Mbodzanai extorting monies for farm labour. Owner still awaiting compensation from Government. Owner has arrangement to compensate workers once compensation is released. Agreement was accepted by CIO but ZFTU threaten to surround the homestead in Mutare.
Davona Welvedrein	Mr Marillier F Bezuidenhout	Chipinge Old Mutare	ZFTU causing strike. One dairy cow slashed and destroyed in last two weeks. \$3 million worth of irrigation pipes stolen.

### **SITUATION REPORTS – MANICALAND, Week ending 7 February 2003**

Pambeli Lot 10 of York		Headlands Headlands	War vet leader Miripiri confirmed no leasing of property. Lessee was accosted and told to get out immediately by a Major Kahooni who wants to move into the house. Labour on strike. ZRP have made arrests.
Msasa	G Woest Mr Brits	Rusape/Makoni Nyasura	Minister Didymus Mutasa arrived at Police Station and all arrested persons were promptly released. Clerks illegally paying out overtime to labourers amounting to millions of dollars. Labour tried to overturn one of the farm pick-ups with two managers in side.
Kondozi Farm		Mutare	Foot and Mouth recorded.
Devon	Mr Odendaal	Chipinge	

### **GENERAL**

Continued theft of assets and irrigation equipment.

Foot and Mouth out of control.

Unrest in Middle Sabi from labour.

Two farmers prevented from going back to their homesteads. When they consulted ZRP they were told they could not expect assistance as the farmers have a Court case pending against the Officer in Charge.

---

### **SITUATION REPORT – MIDLANDS PROVINCE, Week ending 7 February 2003**

### **GENERAL**

The level of theft on farms continues to be a source of concern throughout the Midlands Region.

Cattle herds continue to be dispersed because of lack of grazing, over-grazing by communal herds and shortage of stockfeeds.

Dairy farmers continue to experience inadequate grazing and shortages of purchased food.

Section 8 Orders are being served in various areas of Midlands.

Some farmers have consistent harassment by settlers and ongoing invasions despite good discussions with the P/ and Governor.

A further publication of farm land for acquisition, Lot 83, appeared in the Government Gazette of Friday 31 January 2003. Out of a total of 31 farms, 15 were in the Midlands Region - 7 in Gweru district, 1 in Kwekwe district, and 7 in Shurugwi district. Most listings were for the first time for the farms in question.

---

### **SITUATION REPORT - MASVINGO PROVINCE, Week ending 24 January 2003**

SAVE VALLEY CONSERVANCY

Five properties (Mukwazi, Mukazi, Angus, Chigwete and Mkwesine Ranches) fully occupied. Masapas and Levanga Ranches being further imposed upon. Shortage of grazing in communal areas results in further pressure by domestic livestock on these properties. Poaching continues unabated.

Theft on the increase, examples are one solar panel and large 105 ampr battery stolen from radio repeater, one Motorola base radio stolen from Humani, three 105 ampr batteries stolen from Savuli Safari Camp, one solar pan and energiser stolen from Senuko Hartebeest boma, solar panel stolen from safari camp on Mukazi. Subsistence poaching in the north on the increase.

#### CHIREDDI DISTRICT

On two cane farms, the district lands committee have rescinded their word and allocated the cane fields they had previously reserved for the owners to the A2 settlers.

Theft of brass and aluminium irrigation fittings occurring daily.

#### MWENEZI DISTRICT

Bar G Ranch	M Grobler	Beitbridge	DA Beitbridge taken over property. DA called in Support Unit who destroyed a drinking reservoir and turned a blind eye to the theft of over 30 of the owner's cattle.
Kleinbegin Ranch and Swansea Ranch	S Cawood	Beitbridge	Owners and managers threatened and told to vacate homesteads despite court orders protecting them.
Bubye River Ranch	H du Plessis	Mwenezi	Four head of cattle stolen. Recovered and syndicate broken.
Nuanetsi Ranch	B Landman (lessee)	Mwenezi	30 head of cattle stolen.  16 recovered. Continued stocktheft.
Quaggapan Mwanazana Estate	R Hawkins Triangle Ltd	Mwenezi Mwenezi	10 head of cattle stolen. Poacher put a spear through the security guard's head who died on the spot. Follow up by ZRP resulted in arrests made on neighbouring farms.

#### **SITUATION REPORT - MASVINGO PROVINCE, Week ending 31 January 2003**

Northdale Farm	H Jovner	Chatsworth	Settlers have informed owner that his allocated 500 hectare plot will be taken away.
Nuwejaar Farm	W Weideman	Chatsworth	As above. One dairy cow slaughtered.
Russell Farm	C Erasmus	Chatsworth	Reports of stocktheft.

#### **SITUATION REPORT - MASVINGO PROVINCE, Week ending 7 February 2003**

Nuwejaar Farm	W Weideman	Chatsworth	Continued pressure towards owner to sell dairy herd.
Bon Accord Farm	R Cunningham	Masvingo East	Reports of Foot and Mouth outbreak.
Eaglemont Farm	J Meyer	Chiredzi	Agritex chased off by settlers. Owner had conceded some land to Government, now told the deal is off and the settlers are demanding the whole farm.
Wasarasara Farm	G Warth	Chiredzi	Five new settlers arrived and began pegging.
Benjani Farm	A Stander	Mwenezi	Infected cattle with FMD moved onto the property. Cattle were allowed to stay for two months before settlers told to take them off.

Rutenga Ranch	B Landman	Mwenezi	<p>Owner has conceded half his property to Government. This has not been honoured and he's been forced to hire grazing from Nuanetsi Ranch. Cattle now confined due to FMD.</p> <p>List of recent stocktheft cases: RRB No 0029340 - or bull, five steers.  RRB NO 0029325 - nine cows, two calves  RRB NO 0087493 - 14 cows  RRB No 0084791 - 1 cow killed, two bulls stolen  RRB NO 084793 - 2 bulls, one ox  Five cows, one bull.</p> <p>Owner has been forced to pump water for hundreds of settler cattle at his own expense.</p>
Bubye River Ranch	H du Plessis	Mwenezi	<p>One Lister engine stolen and thought to be set up in area claimed by settlers.  Second homestead completely ransacked.  Influx of large numbers of communal cattle reported.  Five cows, one calf, one steer stolen. Recovered from a settler with all ear tags removed. One heifer, one steer stolen, one big steer snared and dead. All incidents reported to police who have no diesel to follow up.  Poaching continues.</p>
Battlefields Ranch	B Viljoen	Mwenezi	<p>Poaching continues.  Spear removed from cow's eye.  Looming battle over surface water between owner's cattle and communal cattle.</p>
Umbono Ranch	M Clark	Mwenezi	<p>Owner's livestock confined to overgrazing area resulting in 200 sheep and 3 cattle deaths.  Quarantine feedlot proposed to accommodate all cattle affected by drought and FMD. Although Government officials agreed, it was stopped by Warlord Nyengetere. Cattle have been subjected to inhumane conditions, resulting in 150 head either starving to death, been mutilated or stolen.</p>
Quaggapan Ranch	R Hawkins	Mwenezi	<p>People, mainly from Wanezi Block Resettlement Scheme, previously allocated land, now settling on the property.  All fencing, water points, workers accommodation and safari camp vandalised and destroyed.  Manager subjected to continual verbal abuse by Cllr Muzorori and war veteran Nyengetere, including threats to his life.  Owner has lost over 800 head of cattle.  Recently bought 49 from a neighbour but forced to move them off the property by Nyengetere.  Fencing continually being rolled up and stolen. Police powerless.  Poaching continues.</p>
Limbergia Ranch	T van der Venner	Mwenezi	<p>13 head of cattle stolen.  All remaining livestock belonging to the owner ordered to be removed by settlers.  2000 head of communal cattle moved onto the property.  Recently 800 head also moved on by settlers.  All borehole engines either uplifted by DDF or destroyed by settlers.  One of three boreholes drilled by Government supplied water.</p>
Duvi Ranch	R Roth	Mwenezi	
Kleinbegin Ranch	S Cawood	Beitbridge	

Hippo Valley	P Henning	Chiredzi	Conflict between owners of 800 head of cattle and the farm owner and staff over the borehole. Owner's Section 8 overturned in court. He has an eviction order served on a Government Official, known as Mr Kanda. Despite this the owner was issued with new Section 8 (7-day notice). Mr Kanda and two policemen went to the owner's house to arrest him. Mr Kanda insisted the manager who was caretaking the house must be arrested. Kanda intimidated the staff. Previous attempts by the owner to get Dispol to comply with the court orders have been shunned. The Youth Brigade has been sighted on the property several times, intimidating workers.
Sonop Ranch	J Wartington	Mwenezi	Main water pipeline recently cut.
Turf Ranch	A Viljoen	Mwenezi	Whilst owner undergoing an operation in Harare, settlers have started vandalising his buildings. The entire herd had to be dispersed due to the drought and overgrazing by A1 settlers' livestock.

### **SITUATION REPORT - MASVINGO PROVINCE, Week ending 14 February 2003**

#### **CHIREDDI DISTRICT**

A couple of members have had Youth Brigade instigated labour problems.  
Incidents of theft and robbery on the increase.

Wentzelhof Farm	Mr Kotze	Mwenezi	The bank requested the owner when he applied for an overdraft for development, to get written permission from the DA. The DA referred to the lands committee which informed the owner that he had to give up 15 hectares of his irrigation land before a letter would be produced.
Moria Farm	B FayedHerbe	Mwenezi	Agritex wants to expand irrigation across the Beitbridge road and have started pegging the irrigated sections of the cane and mangoes for the settlers.
Bar G Ranch	M Grobler	Beitbridge	Farm managers held a cattle auction of the absentee owner's cattle.
Mwanazana Estate	Triangle Limited	Mwenezi	Theft of cane estimated at \$1 million per month Settlers pushing cattle into cane shoots at night causing damage.
La Pache Ranch	T Evans	Mwenezi	Entire cropping programme of paprika and green maize destroyed or prevented by settlers.
Battlefields Ranch	S Viljoen	Mwenezi	1 cow killed, carcass recovered. Estimated 1200 communal and settler cattle pushed onto the property. Only reliable water source on the property has been destroyed by the communal and settler cattle drinking there.

### **SITUATION REPORT - MASVINGO PROVINCE, as at 18 February 2003**

Bubye River Ranch	H du Plessis	Mwenezi	The manager investigating a rifle shot came across three people, one known as Gift Mhlanga, loading a zebra carcass onto a Government vehicle, Reg GLL 2710. No police follow-up is known. A civilian vehicle arrived and a lady claimed that Mr du Plessis had given her permission to move into the house and that she would be putting Youth Militia into the staff quarters. She had two bodyguards. She
-------------------	--------------	---------	---

Asveld Ranch	J Edwards	Mwenezi	<p>claimed to know all about the manager and his case i Chiredzi (he had been acquitted of a murder charge). She is suspected to be the notorious Deputy Minister Mahofa.</p> <p>Police asked him to see them and on arrival he discovered that his only A2 settler had accused him o sabotaging his water supply by breaking his engines and pipelines. Back on the farm workers told police th Mr Edwards would not do that. It was discovered that the engine had seized due to lack of maintenance, an game had damaged the pipeline.</p>
Nuanetsi Ranch	B Landman	Mwenezi	<p>Lessee is having little joy from Police as far as continued stocktheft is concerned. He is losing cattle almost daily.</p>
LaPache Farm	T Evans	Mwenezi	<p>Settlers are trying to force the owner's staff to start pumps to water "their" bananas or they face assault. Neighbour arrived on the property to pay staff and wa subjected to abuse and threats.</p> <p>It is believed the incident was instigated by the DA of Mwenezi because earlier that day the neighbour was subjected to abuse, false accusations and indoctrination on "colonial wrongs of the past".</p> <p>No Police reaction.</p>
Bar G Ranch	M Grobler	Beitbridge	<p>DA Mbedzi arrived with a Policeman on the night of 1 February 2003 at 11pm and ordered the farm manage to accompany them to Beitbridge.</p> <p>The farm manager was ordered to remove all the owner's household contents and remaining cattle by 1 February.</p>

### **GENERAL**

Poaching continues unabated.

Stocktheft on the increase with no police response.

Lack of grazing due to drought and communal cattle pushed onto properties.

Stockfeeds unobtainable in the southern part of the country - not viable to feed cattle.

Severe drought looming.

Theft of equipment and assets rapidly rising.

---

### **SITUATION REPORT – MASHONALAND PROVINCE, Week ending 14 February 2003**

#### **MASHONALAND WEST REGION**

Elveden Farm	Mr Bornman	Darwendale	<p>Farm not listed but has had settlers since March 2000. Due to the usual demands, confrontations and accusations, the owner was not able to plant for the 2002/3 season.</p> <p>Owner forced to pay out retrenchment packages (SI6 in August 2002 even though the farm was not compulsorily acquired.</p> <p>Owner forced off the farm in October 2002.</p> <p>On 13 February 2003, an army vehicle, Reg 05 BE 97 and five occupants arrived. They forcibly took the gate keys and local warlord Morfu told Mr Bornman he had five minutes to vacate the property. Morfu threatened Mr Bornman and said he had a Section 8 for him. The keys to the house were forcibly taken and then they left.</p>
--------------	------------	------------	---

Leverdale Farm	Mr Linfield	Banket	Police at Darwendale were informed of the incident. The army vehicle and Mr Bornman went to the police station. Army Captain Morfu entered and held discussions with the officer in charge and on exiting he punched Mr Bornman several times. Police, including the officer in charge, were watching - did not react. Mr Bornman was threatened with death by Morfu. He repeated that his farm was not listed. Eventually Morfu was charged \$5000 fine for physical abuse. On 14 February Mr Bornman saw DA Murombedzi to report events of the previous day. He was promised that if Morfu set foot on the property again he would be arrested. The DA said he would send a team to the farm to talk to the settlers. The DA agreed the settlers were on an undesignated farm and would be removed. He also said that Mr Bornman must farm. After obtaining Minister's approval to grow crops under contract the lessee is being threatened with eviction by ARDA officials who are not interested in any documents.
Nkodzwi Farm	D Duffield	Ayrshire	The owner has only a Section 5, but FSI officials told him they were taking over everything and would then pay him out.
Karoi Town Ormeston Farm	B de Jager	Lions Den	An elderly couple were murdered in their house. An on-going saga involves Minister Mombeshora, despite a Section 8 being declared null and void in September 2002. All Mr de Jager's private effects have been removed by five tractor and trailer loads and taken to a nearby farm. Much of the property went missing.

#### MASHONALAND EAST REGION

Two farmers were evicted during the week ending 24 January 2003.  
Farmer Michael Caine was seriously assaulted and hospitalised on Monday 24 January.  
H van Heerden of Harare South was also evicted.  
A van Rooyen of Welcome Home Farm is under pressure to vacate his property.  
P Erasmus of Highlands Farm, a dairy farm, has been forced to vacate his property.

#### MASHONALAND CENTRAL REGION

D Sole and D Kennaird have been evicted in Glendale, and evictions in Centenary continue.  
A number of new Section 8s were issued during January.  
In Bindura a party of Youth Brigade has been stopping farmers from moving their belongings off their farms. Police have not been reacting, saying it is political and they cannot get involved.

### **SITUATION REPORT – MASHONALAND PROVINCE, Week ending 21 February 2003**

#### MASHONALAND WEST REGION

Grand Parade Farm	A P Stidolph	Karoi	The owner gave up half his farm in July 2001, which was then resettled under the A1 scheme. In December 2002 an Agritex team came to the farm with instructions to peg more of the remaining portion for A1 settlers. The Agritex official said the matter could possibly be postponed until the owner's crops were finished for the season. Crops currently in the ground
-------------------	--------------	-------	---

include 30 hectares coffee, 60 hectares tobacco, 100 hectares maize, 20 hectares seed maize and 40 ha sorghum. There are also 500 head cattle, and wildlife. On 20 February 2003 Manyeri, a leading local war veteran, visited the farm along with a man called 'Mr Walter'. They said they were going to change the A1 planned resettlement to A2 and that the new A2 settle would be Mr Walter. The DA, Chisepo, says the owner still has too much land and must therefore give up more. When the owner protested, Mr Chisepo said he would be evicted if he did not comply. The owner has researched 'Mr Walter' and found that he has a dubious farming history. The matter continues. The elderly farmer was shot in the leg on 20 February when he went out to try and arrest poachers. They had been waiting for him and fired approximately 15 shots only one of which hit him. Mr Lowein has lost numerous cattle to poachers over the past three years.

Kasama Farm      J Lowein      Chegutu

### **SITUATION REPORT - MASVINGO PROVINCE, Week ending 21 February 2003**

Mungwezi Ranch      T Ballance      Chiredzi

An elephant was shot and another wounded on 14/15 February on Mungwezi Ranch, part of the Chiredzi River Conservancy. The shooting was carried out by National Parks. Meat was taken by settlers and the skin left on site. National Parks did not notify the owner, in advance, of the planned shooting. Discovery was made by another Conservancy member. The matter was reported to the Police in Chiredzi. The small breeding herd of elephant was purchased 8 calves ten years ago.

### **SITUATION REPORT - MANICALAND PROVINCE, Week ending 21 February 2003**

#### **GENERAL**

A number of farms have had work stoppages relating to wages and volume of work.

In Middle Save farmers have been told that the army is coming to remove them and they do not know if they will be able to reap their soyabeans.

In Rusape, Mr J Bekker, of Budderly, who owns two large mills and is a designated miller, was told by the local warvet leader that whites should not have maize because they did not grow it, they only grew tobacco and similar crops.

### **SITUATION REPORT - MATABELELAND PROVINCE, Week ending 21 February 2003**

Sentinal Ranch      D Bristow      Beit Bridge

Warvets took over and slept in the farmhouse, then took over the hunting camp, confiscating the keys from the caretaker. The camp is fully furnished for 11 people. Warvets refuse to let the owner in to remove his furnishings and equipment. They are demanding that the game guards be removed. The case was reported to the police.

Annandale Ranch      P Maughn      West Nicholson

Owner is having to spend \$3m to replace stolen irrigation equipment in order to farm again after the lands were taken over by settlers. His labour claim that the local MP castigated settlers for growing no crops and told them to stop giving the commercial farmers

Imlizo Kraal	G Parkin	Inyathi	problems. Settlers have taken over the farm and locked the gate for two weeks. There is a lot of equipment on the farm. Labourers indicate the theft of \$14m worth of equipment and plant. Efforts to resolve the problem have failed.
Highfields	R Greaves	Nyamandhlovu	17,400 hectares of the property have been progressively taken over and only the homestead and irrigation lands remain.
Portbury Estate	H Duckworth	Umzingwane	The owner was forced off the property some months ago. Several dwellings have been vandalised with all fixtures removed. The owner returned under police protection to investigate.
France Farm	L Cummings	Matetsi	Several individuals are taking hunting parties onto private land, including France Farm. Farm workers are being intimidated.
	Bill McNair	Mat. North	The farm is a major ostrich producer. After receiving a consignment of maize from GMB for feed, a delegation of vehicles arrived and the owner was accused of hoarding maize and confiscated it. Reports are that the police have sold some of the maize and kept the cash

### **SITUATION REPORT – MASHONALAND PROVINCE, Week ending 28 February 2003**

#### **MASHONALAND WEST REGION**

Karoi farms		Karoi	In January 2003 the MP for the area asked commercial farmers to grow late irrigated maize "in the interest of the nation". Many farmers complied. This week many of these farms have been issued with Section 8 eviction orders, giving them 90 days to vacate. Farmers will not be able to reap their maize in that time. Many of the farmers were planning to plant wheat in the coming winter season. Of the 44 farmers remaining in the district, the majority have received Section 8s. A number of Tengwe and Chegutu farms have also received Section 8s.
Tengwe Estates	Andrew Kockott	Tengwe	Mr Kockott left his farm in August 2002 after his Section 8 expired. The Section 8 has since been overturned by the Courts but Mr Kockott has not been able to return to the farm. In recent months his barns and sheds have been looted and equipment taken over by settlers. On Thursday 27 February he received reports that several vehicles had arrived and people were looting his flue pipes and tilita clips. Police were not responding.
Gwari Farm	L Christian	Banket	The owner has been evicted from his farm. His Section 8 has expired.
Solario Estate	R Sinclair	Banket	A Mr Chris Pasipamire arrived on the farm on 16 February and said the whole farm was his. He said he would bring 400 head of cattle to the farm and would move into the house, bring equipment and would need houses for his workers. Equipment and cattle arrived during the next week. Existing settlers on the farm discovered that the farm had been taken, even though they had been officially allocated plots. The Ministry of Lands has no record of either of the

parties being allocated land on Solario.  
Mr Sinclair has continued to farm but is expecting conflict between the two groups of settlers and is also concerned for his crops in the ground.

**SITUATION REPORT – MASVINGO PROVINCE, Week ending 28 February 2003**

Nuwejaar Farm	W Weideman	Gutu/Chatsworth	The owner has been ordered to leave his farm by 28 February. He is expecting problems.
Farm 54, Hippo Valley Estate	A Fayd'Herbe	Chiredzi	The owner was told he and all his labour must leave the farm by Monday 3 March. He has a Section 8. On Thursday 27 February Youth Brigade members and A2 settlers evicted most of the labour from their homes and demanded that the owner and his father leave. A delegation comprising the local Governor, Propol, Dispol, police officers, army personnel, war veterans and A2 settlers visited the owner ordering him to return all his equipment (which was in storage for safe-keeping) to be returned to the farm as they now belong to the Governor. The farm has been cleared of its Section 8.
Farm 34, 40, Hippo Valley Estate	G Henning	Chiredzi	The farm's Section 8 was overturned. The owner organised for his centre pivots to be dismantled and removed and the company which came in to do so was confronted by settlers. Support Unit came in to help the farmer and there was some violence.
Whitro Engineering	G Whitehead	Chiredzi	The owner was storing some equipment for farmers and was visited by the Governor's delegation saying it was illegal to store equipment and he should leave the country. He had to go to the police station for questioning. There was a meeting later between police and Governor and a negative outcome was expected. Youth Brigade members have ordered the farm labour to leave their houses. Staff are now demanding severance packages. The Youth Brigade have taken keys to the eight centre pivots, pump stations and workshops. Police said the Ministry of Lands was the new policy maker. The owner cannot operate his workshop or move any equipment without permission from the Ministry.
Farm 1, Hippo Valley Estate	B Lagesse	Chiredzi	

## APPENDIX II

## A SUMMARY OF COMMERCIAL FARMING STATISTICS AS GATHERED BY AN IMPACT ASSESSMENT SURVEY

CFU IMPACT ASSESSMENT SURVEY  
FEBRUARY 2003  
NATIONAL SUMMARY

1	Number of members as at January 2000:	3217
2	Number of members as at January 2003:	1443
3	Number of members currently on farms:	
	• Fully operational	453
	• Partially operational	666
	• Non operational (but on farm)	229
4	Number of members off farms:	1246
5	If known, number of members off farms:	
	• Currently living in Zimbabwe	1143
	• Emigrated	318
6	If known, number of members non-operational, but on farm, and members off farms, living elsewhere, who would be interested in returning to farm and becoming operational again:	
	• Non-operational (but on farm)	216
	• Living elsewhere (but willing to return to farm)	486
7	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	Tobacco	14,868 ha
	Maize	11,280 ha
	Seed Maize	2,305 ha
	Soyabeans	10,914 ha
	Sorghum	1,728 ha
	Paprika	2,287 ha
	Citrus	3,500 ha
	Horticulture	3,143 ha
	Potatoes	145 ha
	Vegetables	30 ha
	Bananas	335 ha
	Flowers	106 ha
	Chillies	91 ha
	Cotton	240 ha

	Sugar cane	3,200 ha
	Coffee	341 ha
	Timber	130 ha
	Other crops	3,764 ha
8	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	Winter crops:	
	Wheat	7,637 ha
	Barley	1,705 ha
	Sugar cane	28,090 ha
	Horticulture	948 ha
	Maize	50 ha
	Other crops	135 ha
9	Estimated commercial livestock herd in the country:	
	Cattle	236,748
	Pigs	10,750
	Sheep	750

*Note: some statistics are based on estimates.*

**CFU IMPACT ASSESSMENT SURVEY**  
**FEBRUARY 2003**

**REGION: MANICALAND PROVINCE**

1	Number of members as at January 2000:	165
2	Number of members as at January 2003:	72
3	Number of members currently on farms:	
	• Fully operational	52
	• Partially operational	55
	• Non operational (but on farm)	33
4	Number of members off farms:	13
5	If known, number of members off farms:	
	• Currently living in Zimbabwe	11
	• Emigrated	4
6	If known, number of members non-operational, but on farm, and members off farms, living elsewhere, who would be interested in returning to farm and becoming operational again:	

	<ul style="list-style-type: none"> <li>• Non-operational (but on farm)</li> </ul>	5
	<ul style="list-style-type: none"> <li>• Living elsewhere (but willing to return to farm)</li> </ul>	2
7	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	Tobacco	1880 ha
	Maize	400 ha
	Horticulture	560+ ha
	Coffee	165 ha
	Bananas	335 ha
	Timber	130+ ha
	Paprika	50+ ha
	Oranges / Avocados	?? ha
	Soyabeans	1500 ha
8	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	<i>Winter crops:</i>	
	Barley	35 ha
	Horticulture	220+ ha
9	Estimated commercial livestock herd in the Province:	
	Cattle	4,968

**CFU IMPACT ASSESSMENT SURVEY**  
**FEBRUARY 2003**

**REGION: MASHONALAND CENTRAL**

1	Number of members as at January 2000:	583
2	Number of members as at January 2003:	159
3	Number of members currently on farms:	
	<ul style="list-style-type: none"> <li>• Fully operational</li> </ul>	34
	<ul style="list-style-type: none"> <li>• Partially operational</li> </ul>	93
	<ul style="list-style-type: none"> <li>• Non operational (but on farm)</li> </ul>	33
4	Number of members off farms:	218
5	If known, number of members off farms:	
	<ul style="list-style-type: none"> <li>• Currently living in Zimbabwe</li> </ul>	156
	<ul style="list-style-type: none"> <li>• Emigrated</li> </ul>	62
6	If known, number of members non-operational, but on farm, and members off farms, living elsewhere, who would be interested in returning to farm and becoming	

	operational again:	
	<ul style="list-style-type: none"> <li>• Non-operational (but on farm)</li> </ul>	33
	<ul style="list-style-type: none"> <li>• Living elsewhere (but willing to return to farm)</li> </ul>	68
7	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	Tobacco	3164 ha
	Maize	2400 ha
	Seed Maize	310 ha
	Paprika	233 ha
	Horticulture	178 ha
	Soyabeans	1674 ha
	Sorghum	275 ha
	Flowers	60 ha
	Chillies	91 ha
	Citrus	1000ha
	Cotton	200ha
	Other	725 ha
8	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	<i>Winter crops:</i>	
	Wheat	1730
	Barley	950
9	Estimated commercial livestock herd in the Region:	
	Cattle	10,920
	Pigs	10,000

**CFU IMPACT ASSESSMENT SURVEY**  
**FEBRUARY 2003**

**REGION: MASHONALAND EAST**

1	Number of members as at January 2000:	612
2	Number of members as at January 2003:	268
3	Number of members currently on farms:	
	<ul style="list-style-type: none"> <li>• Fully operational</li> </ul>	89
	<ul style="list-style-type: none"> <li>• Partially operational</li> </ul>	77
	<ul style="list-style-type: none"> <li>• Non operational (but on farm)</li> </ul>	17
4	Number of members off farms:	369
5	If known, number of members off farms:	

	<ul style="list-style-type: none"> <li>• Currently living in Zimbabwe</li> </ul>	375
	<ul style="list-style-type: none"> <li>• Emigrated</li> </ul>	101
6	If known, number of members non-operational, but on farm, and members off farms, living elsewhere, who would be interested in returning to farm and becoming operational again:	
	<ul style="list-style-type: none"> <li>• Non-operational (but on farm)</li> </ul>	17
	<ul style="list-style-type: none"> <li>• Living elsewhere (but willing to return to farm)</li> </ul>	132
7	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	Tobacco	4774 ha
	Maize	1440 ha
	Seed Maize	243 ha
	Paprika	826 ha
	Horticulture	720 ha
	Soyabeans	990 ha
	Sorghum	30 ha
8	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	<i>Winter crops:</i>	
	Wheat	0
	Barley	0
9	Estimated commercial livestock herd in the Province:	
	Cattle	27,320

**CFU IMPACT ASSESSMENT SURVEY**  
**FEBRUARY 2003**

**REGION: MASHONALAND WEST**

1	Number of members as at January 2000:	882
2	Number of members as at January 2003:	353
3	Number of members currently on farms:	
	<ul style="list-style-type: none"> <li>• Fully operational</li> </ul>	86
	<ul style="list-style-type: none"> <li>• Partially operational</li> </ul>	156
	<ul style="list-style-type: none"> <li>• Non operational (but on farm)</li> </ul>	36
4	Number of members off farms:	445
5	If known, number of members off farms:	
	<ul style="list-style-type: none"> <li>• Currently living in Zimbabwe</li> </ul>	395

	• Emigrated	108
6	If known, number of members non-operational, but on farm, and members off farms, living elsewhere, who would be interested in returning to farm and becoming operational again:	
	• Non-operational (but on farm)	61
	• Living elsewhere (but willing to return to farm)	127
7	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	Tobacco	4949 ha
	Maize	3449 ha
	Seed Maize	1752 ha
	Paprika	476 ha
	Soyabeans	4629 ha
	Sorghum	1423 ha
	Flowers	43 ha
	Potatoes	110 ha
	Coffee	176 ha
	Other	1720ha
8	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	<i>Winter crops:</i>	
	Wheat	1900 ha
	Barley	670 ha
9	Estimated commercial livestock herd in the Region:	
	Cattle	47,107
	Sheep	750
	Pigs	750

**CFU IMPACT ASSESSMENT SURVEY**  
**FEBRUARY 2003**

**REGION: MASVINGO PROVINCE**

1	Number of members as at January 2000:	236
2	Number of members as at January 2003:	153
3	Number of members currently on farms:	
	• Fully operational	36
	• Partially operational	78
	• Non operational (but on farm)	20

4	Number of members off farms:	63
5	If known, number of members off farms:	
	• Currently living in Zimbabwe	53
	• Emigrated	21
6	If known, number of members non-operational, but on farm, and members off farms, living elsewhere, who would be interested in returning to farm and becoming operational again:	
	• Non-operational (but on farm)	26
	• Living elsewhere (but willing to return to farm)	37
7	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	Paprika	60 ha
	Flowers	3 ha
	Sunflowers	190 ha
	Citrus (Chiredzi)	450 ha
	Maize (400ha belonging to Triangle)	1099 ha
	Sugar Cane	3200 ha
	Citrus (Mwenezi)	50 ha
	Mangoes	30 ha
8	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	<i>Winter crops:</i>	
	Winter Cane	28090 ha
	Maize	50 ha
9	Estimated commercial livestock herd in the Province:	
	Cattle	35,370

**CFU IMPACT ASSESSMENT SURVEY**  
**FEBRUARY 2003**

**REGION: MATABELELAND PROVINCE**

1	Number of members as at January 2000:	502
2	Number of members as at January 2003:	241
3	Number of members currently on farms:	
	• Fully operational	82
	• Partially operational	116
	• Non operational (but on farm)	83

4	Number of members off farms:	113
5	If known, number of members off farms:	
	• Currently living in Zimbabwe	136
	• Emigrated	14
6	If known, number of members non-operational, but on farm, and members off farms, living elsewhere, who would be interested in returning to farm and becoming operational again:	
	• Non-operational (but on farm)	69
	• Living elsewhere (but willing to return to farm)	106
7	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	Maize	1075 ha
	Paprika	642 ha
	Potatoes	35 ha
	Soyabeans	35 ha
	Citrus	2000 ha
	Cotton	40 ha
	Other vegetables	30 ha
8	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	<i>Winter crops:</i>	
	Barley	50 ha
	Horticulture	215 ha
9	Estimated commercial livestock herd in the Province:	
	Cattle	52,170

**CFU IMPACT ASSESSMENT SURVEY**  
**FEBRUARY 2003**

**REGION: MIDLANDS PROVINCE**

1	Number of members as at January 2000:	237
2	Number of members as at January 2003:	197
3	Number of members currently on farms:	
	• Fully operational	74
	• Partially operational	91
	• Non operational (but on farm)	7

4	Number of members off farms:	25
5	If known, number of members off farms:	
	• Currently living in Zimbabwe	17
	• Emigrated	8
6	If known, number of members non-operational, but on farm, and members off farms, living elsewhere, who would be interested in returning to farm and becoming operational again:	
	• Non-operational (but on farm)	5
	• Living elsewhere (but willing to return to farm)	14
7	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	Tobacco	101 ha
	Maize	1417 ha
	Soyas	2086 ha
	Horticulture	1685 ha
	Other	1099 ha
8	Members currently fully or partially operational – CROP FORCAST ESTIMATE	
	<i>Winter crops:</i>	
	Wheat/Barley	4007 ha
	Horticulture	513 ha
	Other	135
9	Estimated commercial livestock herd in the Province:	
	Beef cattle	45,360
	Dairy cattle	13,533