



Commercial Farmers Union Of Zimbabwe Congress 2019

Commercial Farmers’ Union of Zimbabwe Annual Congress 2019

**76TH ANNUAL CONGRESS
ART FARM, POMONA, HARARE**

THEME: SHAPING THE FUTURE OF COMMERCIAL AGRICULTURE

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1. AGENDA

COMMERCIAL FARMERS' UNION OF ZIMBABWE 76TH ANNUAL CONGRESS ART FARM, POMONA, HARARE

THEME:	SHAPING THE FUTURE OF COMMERCIAL AGRICULTURE
07.00-08.00	Registration of Delegates and Pre-Congress Council Meeting
	CLOSED SESSION
08.00-08.10	Opening with scripture reading and prayer
08.20-09.30	Report from EXCO Regional Chairman Annual Tabled Reports ARAC Annual Tabled Report AISD Annual Tabled Report Appointment of Legal Advisers Confirmation of Trustees CFU Financial Accounts year ending 31 st March 2019 Appointment of Auditors Resume of 2018 Resolutions Resolutions (a) Membership and License Fee Compensation Steering Committee Report and Way Forward Debate
09.30-10.00	Tea
10.00-13.00	OPEN SESSION
10.00-10.15	Welcome and Opening Prayer
10.15-10.30	Address to congress by the President of the Commercial Farmers' Union
10.30-11.00	Introduction of Minister and Official Opening, Minister of Lands, Agriculture, Water, Climate & Rural Resettlement , Hon. Chief Air Marshal Perrance Shiri.
11.00-11.30	Guest Speaker, Dr Theo de Jager, President of the World Farmers' Organization
11.30-11.45	Q&A Session
11.45- 12.00	Economic and Financial Update by Ashok Chakravarti
12.00- 12.15	Off-Grid and supplementary Solar Solutions by Julian Scales
12.15- 12.30	Debate/ Questions
12.30-13.00	Wishes of goodwill from visiting Agriculture Unions and Sponsors
13.00-13.30	CFU Farming Oscar and Honorary certificates
	CLOSURE and VOTE of THANKS
13.30	FINGER LUNCH AND CASH BAR
14.00	POST CONGRESS COUNCIL MEETING
15.30	END OF FORMAL PROCEEDINGS



2. RULES OF DEBATE

Order of Debate

- The Proposer will identify him/herself clearly.
- The Proposer will speak.
- The Seconder will speak.
- General Debate will take place.
- The Proposer will wind up the Debate.

Note: If required, the Minister, Government representative or guest will be asked to reply at a time requested by the CFU President

Length of Speeches

Proposer of Resolutions	–	5 minutes
Secunder of Resolutions	–	3 minutes
Mover of Amendments	–	2 minutes
Other speakers	–	2 minutes

The proposer of a resolution may reply at the conclusion of debate, limited to three minutes. Government representatives and guests are requested to keep their speeches as short as possible. The President may at his discretion allow an extension of these limits.



3. PAST PRESIDENTS OF THE COMMERCIAL FARMERS' UNION

1910 – 1914 HON R A Fletcher, MLA
 1914 – 1916 E Wilson, Esq
 1920 – 1923 C S Jobling, Esq
 1923 S M Lanigan O’Keefe, CMG
 1929 – 1931 H B Christian, Esq
 1932 – 1935 G N Fleming, Esq

RNFU

1942 – 1944 John Dennis, OBE
 1944 – 1946 Hon H V Gibbs
 1946 – 1948 J M Caldicott, Esq
 1948 – 1951 E D Palmer, Esq
 1951 – 1954 J MacIntyre, Esq
 1954 – 1956 M Chenells, Esq
 1956 – 1963 E B Evans, OBE
 1963 – 1968 T Mitchell, DFC
 1968 – 1970 J W Field, Esq
 1970 – 1972 R G Pascoe, Esq
 1972 – 1974 M E Butler, Esq
 1974 – 1976 C Millar, Esq
 1976 – 1978 C J Strong, Esq
 1978 – 1979 D R Norman, Esq

Honorary Life Vice Presidents

A J Laurie, Esq
 R G Pascoe, Esq
 C J Strong, Esq
 C G Tracey, ICD, Esq
 C J Taffs, Esq

CFU

1979 – 1980 D R Norman, Esq
 1980 – 1981 D B Spain, Esq
 1981 – 1983 J M Sinclair, Esq
 1983 – 1986 A J Laurie, Esq
 1986 – 1988 J R Rutherford, Esq
 1988 – 1990 J H Brown, Esq
 1990 – 1992 A D P Burl, Esq
 1992 – 1994 A J Swire-Thompson, Esq
 1994 – 1996 P MacSporran, Esq
 1996 – 1998 N Swanepoel, Esq
 1998 R D Swift, Esq
 1998 – 1999 N Swanepoel, Esq
 1999 – 2001 T Henwood, Esq
 2001 – 2003 C Cloete, Esq
 2003 – 2007 D S Taylor-Freeme, Esq
 2007 – 2009 T R Gifford, Esq
 2009 – 2011 D S Theron, Esq
 2011 – 2014 C J Taffs, Esq
 2014 – 2018 P Steyl, Esq
 2018 - A Pascoe, Esq

Trustees

Dave Bouma, Esq
 Colin Cloete, Esq



History of the Commercial Farmers' Union of Zimbabwe Farming Oscar Award

The Commercial Farmers' Union of Zimbabwe Farming Oscar Award has a long and proud history having been introduced in 1961 by the late Mr C G Tracey during his term as Vice President to the Commercial Farmers' Union as an award in recognition of "those people who have generally done well for agriculture".

This annual Oscar has become known as the "Farming Oscar" to be given to some person or persons who have given outstanding service to agriculture, and has been awarded to people who have contributed to the Industry in its widest sense.

Over the years winners have been chosen from the practical and scientific disciplines of agriculture, as well as from the administration and leadership roles with the winners selected in recognition of having contributed significantly to the agricultural progress in Zimbabwe.



4. OSCAR WINNERS- COMMERCIAL FARMERS' UNION AWARD

OSCAR WINNERS – COMMERCIAL FARMERS' UNION AWARD

1961 E B Evans, OBE	1990 P Millar
1962 A Rattray, OBE	1991 Dr S Hargreaves
1963 E R Campbell, CBE	1992 R Ternouth
1964 R Stockil, KBE, OBE	1993 Dr P Grant
1965 A C Black	1994 R Winkfield
1966 Dr I McDonald	1995 D Smith
1967 Dr H Pereira	1996 M Edwards
1968 J R Southall	1997 H Smith
1969 W Margolis	1998 V Hurley
1970 H R Mundy	1999 N Swanepoel
1971 The Hon J C Graylin, ICDCMG	2000 P Lombard
1972 C G Tracey	2001 Dr L T V Cousins
1973 Dr R C Elliott	2002 R Tattersfield
1974 M E Butler	2003 Dr J Jackson
1975 N Swanepoel	2004 D Hasluck
1976 R A Griffith, ICD, MBE	2005 Dr J Grant
1977 J R Humphreys	2006 D S Taylor- Freeme
1978 D K Worthington	2007 A Masterson
1979 C J Strong	2008 D Drury
1980 M Rosenfels	2009 R H Vaughan-Evans
1981 D R Norman	2010 Mike Campbell & Ambassador Xavier Marshall
1982 J W Field	2011 B Oldrieve
1983 J M Sinclair Marchel	2012 Dr C Foggen
1984 J W Hayward	2013 L R Bruce
1985 H J Quinton	2014 C J Taffs
1986 John & Jill Laurie	2015 Dr D Bruce
1987 Dr R W Mupawose	2016 Dr J MacRobert
1988 J Brown	2017 M Clark
1989 R K Harvey	2018 P Steyl



5. RESOLUTION: FARMERS' LICENSE FEES AND RULES

The Council of the Commercial Farmers' Union resolves and recommends to Congress the adoption of an Annual License Fee for the 2019/20 year commencing 1 October, 2019 to become due and payable.

Council further resolves and recommends to Congress the adoption of a payment commencing 01 October 2019 and ending 30th September, 2020 applicable to all members as illustrated in the following schedule:

CLASSIFICATION OF MEMBER	FEE PAYABLE
LARGE OPERATING MEMBERS	1000 Units per annum or 100 Units per month
OPERATING MEMBERS (STANDARD LICENSE)	500 Units per annum or 50 Units per month
NON OPERATING MEMBERS (ARAC LICENSE)	100 Units per title deed up to a maximum of 2
CORPORATE MEMBERS	1000 Units per annum or 100 Units per month
ASSOCIATE MEMBERS	100 Units per annum

The ZWL value of one CFU Unit as at 1 October 2019 was ZWL\$15.00. Due to the current inflationary environment, the ZWL value will be adjusted as necessary to maintain the real value of the CFU License Fees. Members are advised to please confirm the value of the CFU Unit with the CFU office on the date of payment. Monthly, quarterly or other payment options can be made available should members prefer to make use any of these options. In addition, terms can be discussed in cases of hardship.



6. TABLED REPORTS

REGIONAL REPORTS – 2019

MIDLANDS REGIONAL REPORT

I would like to start off by spending a minutes silence to remember those from our community both current and past who we have lost this past year

Stoffel Herbst

Keith Watson

Ken and Sandy King

Pat Glenn-Williamson

Valda Liebenberg

Dick Hartley

Clive Hein

Attie Scheepers

It has been an awful year from the loss of so many amazing people in our community. Before I start my report I would like to express my thanks to a few people for all their hard work this past year. Shaku Deva for keeping our office afloat and in top condition despite the loss of her full time job with CFU; Andy, Ben, Mike, Louise and the rest of the staff at CFU head office for continuing to do an incredible job for us farmers despite the pressures and issues faced this last year. Pat Ashton (ARAC) and Mac Crawford, John Laurie, Charlie Taffs and Harry Orphanides for all the work they have done on the Compensation Steering Committee.

It is very humbling when you get to see first-hand how much people do for us all behind the scenes. The support for us in wage negotiations and countless other areas is immeasurable and we wish to thank them all so very much. Our affairs could not be in better hands.

The year started off really badly with a very poor wet season with most areas only receiving around 400mm of rain of which it was very sporadic and very low inflows were received by the dams in the Midlands. This has been followed up by a very cold winter.

In the financial sector the agricultural industry has gone through a very difficult period of very high inflation (over 100% year on year) on inputs but there has been significant downward pressure on our products of up to 50% in real terms. This has forced all farmers to sell assets and productive animals to meet the monthly shortfalls. Those with access to collateral have had the ability to borrow short term and, until the recent move of interest rates to over 20%, they have cushioned these borrowings by stocking feed and allowed inflation to take care of the interest. However, going forward, if the real price of our products does not manage to see upward movement we are going to see significant losses of productive enterprises and the costs of recovering these once lost is going to be too great to justify. Currently the prices of inputs has seen a conversion from a high US dollar cost previously, to then be converted at black market rates to ZWL's, making the prices unaffordable at current product income levels. Unless we see enough foreign currency available to the industry at the bank rate it is hard to see how prices of inputs can come back to levels where our products are more affordable to the consumer.

The livestock industry across the board has been plagued by this failure to receive a full wet season which has led to the prices of stock feed climbing to levels that threaten the future of all these industries. I want to commend those farmers in these industries for pulling the proverbial rabbit out the hat and keeping themselves going through this very difficult twelve months. All these industries were very severely impacted by the decision by government to withdraw their access to GMB maize and



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giving only a small number of companies access to what remained of the maize for stock feed. This resulted in a monopoly of feed producers who ended up producing feed throughout this period at up to 30% more than our farmers could home mix for. This had a significant effect on us as producers and for the customer who had to try cover this higher production cost. Bio security and disease control are becoming important as we try isolate our businesses from the threats around us. The beef industry is seeing diseases not previously a threat as farmers cannot afford to carry out due diligence or cut corners in disease prevention.

Raw crops have suffered from this inflation with their returns in real terms also severely slashed. Poor rainfall has led to virtually no production from dry land crops and although irrigated crops did well the cost of production has far outstripped the levels of returns and farmer's ability to put in crops next season is not looking good. Wheat/Barley crops are currently severely affected by the shortage of electricity which has not met the promised level of at least 4 days power per week. Hence the outlook for these crops is not at all good.

The only crops with a promising future are those that will see direct exports of their products. These will give farmers access to foreign currency for imports of inputs currently too expensive locally and a return that is almost in line with inflation as its local returns are realised at the fluid interbank rate.

Tobacco has seen a predicted record crop produced this year but the selling season has not been enjoyed by farmers. Real costs of production are significantly up over the last 5 years but sales are down by about 30% this year alone.

Vegetable crops have also seen returns slashed as consumers spending ability has not allowed them to keep up with real returns.

This year has seen the CSC and ARAC manage to arrange an interim payment for those facing financial constraints and we want to thank those involved in arranging this assistance for all their hard work. It has not been easy and unfortunately has also been a victim of the inflation seen in our country. It has highlighted a number of difficulties we could face should compensation become available and I want to reiterate to all our members and ex farmers how important it is to get our paperwork in order now.

It pains me to look at this report and see how much negativity it seems to convey. So in closing I would like to just say what I am grateful for:-

I am grateful for the community around me regardless of race, religion or affiliation who are hardworking and so determined to try help our country through to better times. I see innovation and tenacity none of us thought we had and I am proud to be part of it. Despite hard times people are for the most part honest and peaceful. Something Zimbabweans are renowned for. I thank you all and wish you all the very best for the next season.

Kevin Franceys

Chairperson Midlands Province



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MASVINGO REGIONAL REPORT

Each year, particularly when facing difficult times, we always used to say that, "Next year will be better." A year ago we felt quite confident of that, but who would have thought that the situation would have changed as drastically as it has?

Quite frankly this past year has been extremely difficult, not only for the farming community but for everybody in Zimbabwe. For the farmers, the rains were very erratic, so those without irrigation suffered badly with their crops. Some were even replanting their dry land maize with the bit of rain that fell over the Christmas period. But then there was another dry spell and then much later came Cyclone Idai, which, fortunately for our province had drained itself of its main strength by the time it passed over the mountains of the Eastern Highlands.

Although the cyclone caused major damage in Manicaland and Mozambique, as well as parts of Malawi, with an unprecedented massive loss of life, with many still unaccounted for, it did bring the country together once again. For weeks on end people emptied their cupboards (and hearts) resulting in a never ending procession of people delivering goods for the homeless. Volunteers to deal with this massive amount of donations came from all walks of life who sorted it and loaded it 24/7 into trucks for the onward journey to the cyclone affected areas.

We are also proud to say that the first helicopter to arrive to assist belonged to one of our own ex-farmers and the same with the first 4x4 vehicles to go in and do assessments of the damage to the roads to chart the way for the Lorries going in with heavy loads of relief supplies. It was so wonderful to be a part of this incredible unity of purpose to assist the less fortunate who had suffered greatly from the tragedy.

However, on the down side, access to land by aspiring next generation farmers is still being curtailed by a strictly racial and partisan approach towards dealing with applications, just as it has been for the past 20 years or more. Basically, despite much promising talk by our national leadership, since the New Dispensation took over, there has been absolutely no change. Instead of providing encouragement for the new generation to farm and guarantee security of tenure, quite the opposite has continued.

We still have farmers in our province who are forced to defend their rights and possession of their farms in the courts. They are being prosecuted by the Ministry of Lands and Agriculture to evict them from their farms.

From our part we are all quite willing to change and adapt, but sadly there have been no similar reciprocal measures or apparent interest shown towards adopting any positive policy changes. Our mandate has always been to develop agriculture in Zimbabwe for all. Surely, is it not time to allow the new generation of farmers access to take part in the development of the huge swaths of unutilised agricultural land with huge potential in our province?

Some people are too shy to give their age away, but this year we celebrated Neville Richards turning 100, Jeanette Harvey turning 95, Hannes Kotze turning 90 and Pat Potgieter turning 88. Congratulations to them all and many others of that vintage. There are also half a dozen of us 49ers who reached our three score and ten years this year.



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Obituaries

Thankfully, far fewer of our now dwindling farming community left us during this past year. We fully recognise these wonderful people, below, who sadly passed away over the past year, for their lifetime's commitment towards playing a huge part in the development of our industry and beyond. We salute them all.

A couple of days ago another Mwenezi rancher, **Nick du Plessis**, sadly passed away. Although his exact age is not known he was well into his 90s. Nick ran one of the best Bonsmara herds in the district and had a passion for his successful breeding of race horses. He sold his property in about 1980 taking his horse stud to retire in Harare.

In the middle of August 2019 we sadly bid farewell to the late **Dr Colin Saunders** who played a huge part in the lives of many Lowvelders. He left a huge legacy for both his work in his medical career and of course the wildlife industry, notably Gonarezhou and Malilangwe, which he also chronicled in the books that he wrote. He will be sadly missed by many but certainly never forgotten.

Mwenezi stalwart **Ronald George Hawkins** also sadly passed away in July 2019. He and his late wife Kewpie became a large part of our Mwenezi community after buying their Quaggapan property shortly after Independence. Those who knew him will certainly miss his unique sense of humour.

Another of our old Mwenezi stalwarts **Attie van der Westhuizen** passed away in June in Zambia after a long illness. He was certainly known for his sense of humour despite all the hardships he endured for so long.

Neville Graham Richards turned an amazing 100-years old in 28 October 2018 and all his family came from all over the World to celebrate this wonderful occasion with him. Sadly though he passed away in the middle of April 2019. Although born on a farm in Masvingo, where the family and he farmed later, he was instrumental in starting the Richards group of commercial companies, which is still expanding today with the same family.

Norman Smith was brought up on a farm in Masvingo where he started his farming career and later moved out of our province to farm at Beatrice. Sadly he also passed away in September 2018.

Weather

This was another very strange or unusual rainy season, which started fairly early with some promising rain and then dried out again until around Christmas before the next showers. However, there was no follow up until the effects of the Cyclone Idai hit the province. Unfortunately, only the eastern parts of the province benefitted from that whilst the western part, particularly the southern parts were extremely dry.

As a result the main rivers did not take much water at all and did not put much water into the major dams of Mtirikwi and Tugwe Mukosi. Mtirikwi water has only been used to supply Masvingo City whilst



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Tugwe Mukosi water supplied the sugar industry with water. Both dams are currently sitting at about 50% full at the moment.

Livestock

It is sad to say that the cattle industry in Masvingo Province has still not recovered from the crushing effects of the Land Acquisition. Years gone by our province was a major supplier for export to the EU, which required very strict Foot and Mouth Disease control. The Cold Storage Company was assisted by the EU to renovate their abattoir in compliance with International Health Standards and became a major asset to Masvingo by also creating major employment at the time. It was a common sight in those days to see convoys of RMS and private cattle haulage trucks on the roads into Masvingo. At the time CSC were slaughtering between 300 and 600 head of high quality slaughter stock 5 days a week.

Sadly, this all disappeared soon after Land Acquisition, as have the large numbers of high quality, uniform commercial breeding herds, which took years of selective breeding and skilled management to achieve. The CSC abattoir was subsequently put into mothballs. There is now a very competitive market with numerous small cattle buyers who face huge difficulties in the location of slaughter stock. With the lifting of the majority of the old farm fences, the straying of cattle and the illegal movements the control of Foot and Mouth Disease is very difficult and is now almost reached a national epidemic status and is virtually out of control.

With the new system of A2 and A1, communal farming, no form of sustainable grazing management or disease control is possible. This is particularly noticeable in a year like we have just been through of low rainfall. Grazing cannot be rotated or even kept for, say, the summer calving season etc. So in the drier areas we can expect more poverty deaths before grazing can improve several months after the initial rains.

On the upside our single remaining pedigree breeder did fairly well with his sales at the National Bull Sale in July, but reports that his volumes of other sales have not been good due to low demand. He too is facing an uphill battle trying to protect his herds from disease and to conserve his grazing due to uncontrolled marauding cattle in the area.

Hidden away, there are also a few other breeders, feedlots and abattoirs in the province and we certainly welcome the new investor in CSC who is also busy restocking the old CSC ranches with cattle imported from South Africa. As we all know cattle ranching is a long-term investment so it will take time before we feel the effect. But he is also slowly renovating the old CSC abattoirs to cater for future increases in business. At the moment the inflation has drastically reduced spending power so beef is now a slow mover off the supermarket shelves.

Our only major poultry producer is still expanding and dominating sales in day-old-chicks but with the current economic downturn their market has also been adversely affected. This has not deterred them to continue expanding their valuable investment, which is a real asset to our province.

Pig production has now reverted to small-scale production, which is also a far cry from what it was when the Colcom abattoir was built so many years ago to meet with the high production in our province.



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It is the same with dairy production here we have only one producer left. All in all the potential is there, but

Wildlife

This is/was a major industry in our province, but it is still under the major threat of Land Acquisition. Although the ranches within the conservancies fall under the Environmental Ministry and not under Lands and Agriculture, they are constantly under pressure to release more and more land for occupation by small-scale farmers.

Although major plans were made many years ago for the development of Transnational Conservation Areas the maps are constantly being redrawn and boundaries moved. As a result more villagers from surrounding Communal Areas are either being planned to be brought in, or have been brought into the existing conservancies, resulting in major human-wildlife conflict, as well as massive deforestation, poaching and the degradation of the natural habitat.

The wildlife areas are literally that as they are not at all suitable for occupation by humans or their domestic livestock. They have been established in areas of extremely low and erratic rainfall, which also experience lengthy periods of extreme heat.

We highly commend the Frankfurt Zoological Society's continued development of the Gonarezhou National Park. Their initiative to upgrade the park has certainly been much appreciated by all those who visit it.

See below report from **Blondie Leatham** of Buby River Conservancy:

"A very challenging year as I am sure it has been for all. The drought conditions and a marked increase in rhino poaching incursions have both been a great concern – then the new SI from RBZ came along to add to our woes. Up until RBZ changed the goal posts we were cushioned from the effects of the deteriorating economic situation because we are able to operate using our Nostra account and were paying all our junior employees in USD cash up until end of July. Some very long faces at the end of August when we were forced to revert to ZWL!

Our anti-poaching operations have been beefed-up considerably by running 3 selection / training courses so far, which has enabled us to nearly double the number of scouts that are in the field, this despite a very high dropout rate on those courses. BVC also has 5 dedicated anti-poaching managers instead of just the two that we had up until 3 years ago. Extra vehicles, rifles and other kit have also been added to improve the A/P efforts.

Despite a number of successes this year, including having accounted for 2 of our ex scouts in a shootout, there has only been a slight slowing down in the number of incursions, but hopefully the knock-on effect will soon start making a difference.

Regular polygraph testing of our staff is also proving to be very useful and hopefully the second half of 2019 will see a marked drop in poaching incidents, and the support that we are getting from the Police and Parks is really encouraging.



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On the hunting side, we have had a reasonable hunting season so far and some exceptional trophies taken, the most notable being a 49" Buffalo and 26 9/16 Lion. Most leopard that have been taken are over 16" and more than 30 of the buffalo are between 40" to 46". Rumour abound about BVC stopping hunting but this is not the case and we have already booked over 50 hunts for the 2020 season.

Let's hope that we have early and normal rains and that our A/P team continue to whittle down the rhino poaching syndicates."

Below is a recent interesting comment by **George Hulme** on hunting:

"Wildlife in many well managed safari hunting areas is just as docile and approachable as that in non – safari hunting areas. In fact populations in a large number of non - hunting areas are extremely wild and nervous due to uncontrolled and continuous poaching pressure. Safari hunting areas are generally well managed and policed. Poaching is very much under control and combined with low volume non - stressful trophy hunting, results in undisturbed and safe wildlife populations living naturally in an unspoilt habitat, including many of the endangered species such as Rhinos, Wild Dogs, Pangolins and Tortoises.

Wherever wildlife areas are controlled by an ethical, sustainable, uncorrupted and well regulated trophy hunting industry and a strongly committed, incorruptible wildlife authority; it has created the desire, energy and financial resources to ensure the long term survival of wildlife species and wildlife habitat; often far more successfully than many other conservation initiatives.

It is the responsibility of all hunters and regulatory bodies to ensure that utilisation by hunting is carried out morally, ethically and humanely, and continues to lead the way in the sustainable utilisation and conservation of wildlife. There is a vast difference between commercial poaching and properly regulated safari hunting, the former is responsible for the extinction of species and the latter ensures their survival.

Uninformed and exaggerated anti-hunting emotionalism does more harm than good to the conservation of wildlife. Corrupt and indifferent management by wildlife authorities has the same effect."

Sugarcane Industry

See below from **Stephen Schwarer** who is thanked for keeping a keen eye on the sugar industry:

The positive side of the sugar industry is that it is milling well and the recoveries although low at the start of the season have picked up nicely. Estimated tons cane to crush this year is 3,625,000 tons with estimated sugar production of 459,000 tons. We are about 56% through the crush and estimate to finish mid-December. The industry however is facing the same challenges as all farmers in respect of prices of inputs like water, fertiliser, and fuels. However the most significant threat is the electricity situation.

Coming into summer and having most farmers only getting power at night (10pm – 4am) the replenishment of the night storage dams is proving almost impossible. Although cane can sustain a certain amount of water stress when temperatures are in the late 30's continuously and your irrigation



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cycles are 130% of norm the crop and yield for the next season is compromised. ZINWA have advised a new price for water of Z\$75 ML up from Z\$5 for the out growers and Z\$ 9.75 for the estates.

Labour and wages remain a constant negotiation with farmers paying a COL around 100% of statutory wages and initiating food packs.

Access to Land

For the last 18 months or so we have been told categorically that the Fast Track Land Reform Programme is over, although it would not be reversed, so all farmers on the land should apply for 99-year leases. Although most of our farmers complied, and are still either making new applications or following up on old ones, nobody in our province has yet received one. The whole process has been laborious, sensitive and time consuming, particularly when travelling to, and tracking down, the numerous signatories required to authorise the request on the application forms.

Applications for A2 offer letters are also the same and again there is very little success for our highly experienced farmers. Therefore, as we are so often advised by the ministry, we are to seek a Joint Venture with a person who has been allocated land. This arrangement often does not work and in reality merely gives money to rent seekers who have no interest in farming and have obtained the land for absolutely free. This, in reality, is depriving the State of money it could use for compensating our farmers who were dispossessed of their property.

Furthermore, any decisions made at a local level often do not take into account either the farmer's abilities and experience or whether the investment would have a positive effect by increasing production and assisting the national economy.

Chapter 16 of the Constitution of Zimbabwe needs to be amended to remove the prohibition of previously advantaged people owning land. And then we need compensation for those who gave up their land and restitution for those who want to farm their own land again. Surely, this is not asking too much if we are serious about increasing agricultural investment and production.

We also need a land bank to assist with new farmers regardless of race, tribe or gender who are Zimbabwean citizens to enable them to buy land to farm productively. And of course, we believe title is the best form of tenure to empower farmers and this should not exclusively vest in Government. This applies both to Commercial and Communal land just as the Namibian authorities have recently successfully done.

As long as we keep trying and don't give up, we will get there eventually. We are here to help and work together, not to obstruct, as we fully realise the necessity for our nation to be self-sufficient in food production again, as well as taking full advantage the available export opportunities.

Masvingo Region and CFU

Our virtual Farmers' Association has been working very well on the Masvingo Whatsapp group and please be assured that your opinions and suggestions have been taken very seriously and have played a valuable part in our planning and lobbying to find a sustainable way forward. Our financial consultant



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Jean Simon has also been a regular contributor giving us all her valuable advice for free. Thank you all so much for your constant input.

Sorry that we have not held any meetings again this year but your regular contact, whether by visiting our office in Harare, or by telephone, or by email has also assisted very much indeed and the contact by any of these or other means has been very welcome indeed.

Rob Beverley and I have continued to work closely together and I treasure Rob's very wise counselling, particularly at Council meetings, which he attends. Although Rob is always modest of his help he is a good shoulder to lean on.

Behind the scenes I have also been kept extremely busy with the continuation of my Human Rights work for which I thank my sponsors most sincerely to enable me to compile the valuable record of incidents, which occurred on our farms from 1997 up until the present date. However, the compilation of the CFU Calling has also kept me very busy taking the whole of every Friday to put together. But at the forefront of all of this is our determination to keep protecting the rights of our own farmers and dispossessed farmers from Masvingo who are very close to our hearts.

We are very grateful to the ARAC (headed by **Patrick Ashton**) and Compensation Steering Committee's (headed by **John Laurie**) commendable successes made on the compensation issue during the year. I have been involved a bit and attended a few meetings with them where I have witnessed their absolute diligence and very wise tactics. It has certainly not been an easy task for them, but we must give them full credit and a huge vote of thanks for finally succeeding with the Interim Relief payments this year. These started as an initial request for a monthly pension some 5 years ago, which was eventually agreed to as an annual payment. Unfortunately the current high inflation has considerably eroded the value of what was being paid, although it is greatly appreciated by all the recipients.

Behind the scenes it has been quite a challenge to get the agreed payments moving, which has created a huge amount of extra work for the Valcon, CSC and CFU teams. We are very lucky to have two wise, no-nonsense and determined chaps like **Charlie Taffs** and **Harry Orphanides** being at the forefront at the meetings, and I thank them both sincerely.

But when dealing with those who submitted applications for the Interim Relief it has been quite an eye-opener witnessing the advanced age, state of destitution and poor medical condition many of them are in. It has been an absolute pleasure meeting and doing whatever we can for such wonderful people.

Quite frankly though, it is an absolute crime what has happened to these once healthy and highly productive farmers following the often violent dispossession of their farms, homes and businesses without any form of compensation. This motivates us even more to lobby even harder to obtain full compensation for all. So many of our dispossessed farmers have unfortunately passed away before their time, often being unable to afford adequate medical treatment.

This is in no way demeaning or understating the outstanding work done by the other voluntary team at the Farm Families Trust led by **Barry Munro**, who have helped so many farmers and their families when in dire need. However, quite often many ailing farmers are still, sadly, far too proud to apply for charity,



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even though they so desperately need it. We must also sincerely thank those generous people in South Africa who have continued to provide food parcels for us to distribute to the needy.

We have a small staff compliment here at the main CFU Office but we are a very strong team headed by Director **Ben Gilpin**, who is a wonderful person to work with and an absolute credit to your Union. The way he handles himself with the sensitive issues and in particular his interviews with the press, be it on either television or radio is truly exemplary. We could not have a better person doing this.

Andy Pascoe spent his first year as President of your Union and has been a breath of fresh air. We always seem to have the right President at the right time to suit each particular circumstance. He has found it much easier to open all the doors of Government and has been a very strong voice in their corridors, even right up to the top level. He was also appointed as the CFU representative on the CSC where his views and wisdom on the compensation issue are very well respected.

His optimism for the continuation of your Union through the growth of the commodities has gained us far more membership from the younger farmers out there who have avoided us in the past. Again, it has been an absolute pleasure working with him.

We can only pray for a better year next year.

Keep strong and united.

God bless you all.

Mike Clark
Chairman Masvingo Regional

MASHONALAND CENTRAL REGIONAL REPORT

I would like to welcome everyone to this meeting and thank you all for making the effort to attend. Over the past year there have been several members from our district who have passed away, may their souls rest with the Lord in peace. I would also like to convey my sincere condolences to all the families' friends and relatives who have lost loved ones.

The farming environment has remained extremely challenging during the past farming season. The positive agricultural and business reforms (Zimbabwe is open for business) promised by government in the past twelve months which showed much promise and optimism, have translating into very few results on the ground. Farmers remain facing the same logistical and financial constraints: lack of access to finance, high interest rates, a depreciating Bond Note currency, escalating input prices, uncertain land tenure and a complex and time consuming business environment.

This season's rains have been some of the lowest in living memory. The drought has had a dire impact on dry land row cropping resulting in yields plummeting. This after two years of plentiful rainfall, was a surprise to many, and just when farmers thought that production was guaranteed and there was easy money to be made in the agricultural sector. It only goes to show how important the development and investment into irrigation and other high tech methods of production are. With the poor rains and the delay in receiving Governments Command inputs, many A1 and A2 farmers are unable to repay loans allocated to them and this will inevitably prevent them receiving further assistance in the future.



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Government's decision to control the price of maize by issuing SI 145 of 2019, and making it law that producers have to sell all their maize production to GMB, has put a cat amongst the pigeons. By reverting back to price controls in an attempt to mop up cheap maize for the Government's strategic food reserve, it has resulted in most producers storing the scarce commodity and not selling the maize, it will also impact negatively on next season's production as farmers will be reluctant to plant, not knowing what price will be achieved, and whether the GMB will have the funds to purchase the crop. The end result is that Zimbabwe will need to find precious foreign currency to import a considerable amount more maize in order to fill the gap for both human and livestock maize consumption, rather than pay local farmers a realistic price and allowing them to remain viable and doing what they are more than capable of achieving "feeding the nation".

The winter season's cropping has been disastrously affected by the current state of affairs. The shortage of water and the intermittent and erratic supply of electricity have considerably reduced the total hectareage for wheat and barley plantings, and the potential yields for the crop in the ground are certainly well below normal. Shortages of diesel have compounded the problem even where producers have the ability to provide backup power in the form of generators. The dilapidated and poorly maintained electricity distribution grid, together with the ever increasing vandalism and theft of ZETDC infrastructure is one of the major limitations to growth and development in Zimbabwe, not only in agriculture but in all areas of commerce, manufacturing and industry.

Farmers also need to be made proactive in preventing environmental degradation. A serious concern this season has once again been the massive surge in uncontrolled fires, burning up scarce grazing for livestock and damaging infrastructure, this coupled with the huge deforestation of large tracts of indigenous woodland, used for domestic fuel and tobacco curing. This is rapidly causing irreparable damage to top soil, excessive soil erosion and the siltation of water courses and dams in many areas. Conflict between alluvial gold panners "Makorokoza's" and farmers over land is on the increase and their presence is quite often a major security concern for the rural communities.

The land tenure system where most commercial farmers are forced into entering JV's with resettled land holders is generally problematic and short termed. With the new political environment it is hoped that the Zimbabwe Government will start to re-establish property rights, which will allow genuine Zimbabwean farmers of all colour, creed and back ground the opportunity to get serious about productivity and job creation. Investors both local and international need real security and stability on the land before they make much needed long term investments, especially with fixed improvements and high value export crops.

It remains for me to thank the CFU team for all the hard work that they put in behind the scenes, in keeping current farmers and compensation issues relevant in Zimbabwe today, and to pray God's blessing on all farmers and their families for the coming season.

Angus Guthrie
Mashonaland Central

MASHONALAND WEST – NORTH AREA REPORT

Overview

The 2018/19 farming season was a very bad drought and farmers experienced very long dry periods during the season which affected the yield of crops enormously, especially the early planted dry land



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crops. There is an ever increasing amount of white commercial farmers making deals with the current offer letter holders and farming. A lot of the farmers are satellite farming and travelling great distances to tend to their crops, which is not ideal. There is an increasing amount of complaints being raised in dealing with the offer letter holders whereby they change their mind about land usage, they are demanding unreasonable price increases and there are cattle roaming unattended into commercial crops causing a great deal of damage. The rapid erosion of the value of the ZW\$ has caused further pressures between the farmers and the offer letter holders. With these problems emerging a number of commercial farmers have expressed the fact that it is becoming difficult to continue with the present system. A great deal of irrigable land is still idle that could be utilised by skilled farmers to produce much needed crops to feed the population.

Offer Letters and 99 Year Leases – Several farmers in the area have had their 99 year leases submitted for more than a year. However the Ministry of Lands have recently told applicants that the system of applying for a 99 year lease is wrong and they now have to apply for offer letters first. Despite some farmers doing this there is still no commitment from the local Lands Office in ensuring that these applications are recommended and moved forward to the next level. In the meantime, there are large corporates who are moving into the area and taking over large tracts of land thus diminishing the possibility for local farmers to take the opportunity to submit their applications and be in a position to farm with secure tenure.

Crops

Soya bean-There was a small increase of soya grown this year. Yields on dry land were poor but were good on irrigated lands in the commercial sector. However production was well short of demand and ways of rectifying this need to be found.

Maize- There were meaningful areas grown to maize. Yields were good in irrigated areas and poor on the dry land areas. The GMB price did not stimulate delivery and the S.I. making the GMB the sole trader in maize will not stimulate production. There also remains great opportunity for increased maize production on irrigated land that is lying unproductive.

Cattle- There are a number of herds that remain in the area but most have been reduced due to grazing constraints. Production is difficult but there are still a few producers that are maintaining their herd quality and some good bulls are still available from these breeders. There is room for growth and opportunity in this sector. Foot and mouth has been a problem in some areas that have become no movement zones for livestock.

Wheat- Wheat has seen a decrease in area grown and this and the extended power cuts has compounded the deficit of national requirements and will need constant growth for some years to attain self-sufficiency. The strategic nature of wheat means that much more effort needs to be made to bring irrigated land back into production and get the volume produced back to over 300 000 tons per year as in the past. There is no announced price at time of writing.

Other Crops- There are a few other crops being grown by members and these include, Potatoes, Sugar beans and small grains. Potatoes have become an important crop to producers that have some irrigation and are able to maximise returns off diminished areas by growing high value crops. Good yields of +50 tons per ha and fair demand have given potato production a boost.



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Conclusion

Security of tenure on land to enable commercial farmers to grow their crops unhindered is crucial and needs to be addressed urgently as the next season is upon us. If this is dealt with urgently and efficiently there will be some substantial volumes of crops produced in Zimbabwe. There is a neutral El Nino- La Nina predicted for the 2019/20 season so the sooner security of tenure on irrigable lands is prioritised the better it will be to enable maximised yields to be achieved. Until the financial situation in Zimbabwe is sorted out we will endure the same problems for the coming season whereby inputs will increase in price and will be even more difficult to procure. It is hoped that this is also dealt with urgently so there will not be a negative impact on future production.

Roy Linfield

Mashonaland West - North

MANICALAND REGIONAL REPORT

Introduction

It remains sad that Manicaland does not have an elected member sitting at CFU Council representing Manicaland. I have spoken to several farmers and potential members, and have tried to encourage them to attend meetings and elect a person to represent them but have failed dismally.

It was hoped that with the change of Government and a new dispensation at the helm, farming would regain the initiative and once again become the backbone of our economy. Sadly this has not gained the impetus which the Farming Community richly deserve and there are a number of reasons why this is the case. Whilst there has been a break in pressure exerted on the Land Reform Program, many other pressures have come to the fore. The most concerning problem faced has been the instability of our currency and the economy in general. Whilst tobacco producers, for example, receive foreign currency for tobacco sold, this is changed at "inter-bank trading values" to acquire local currency through the banks, and they are disturbed to find that most businesses around town use a highly volatile street value and charge as much as 30% more than the "inter-bank rate" for inputs, spares and the like. This has a direct influence on the viability of the producer. Many are suffering the consequences and believe me; many will opt to cease farming if this trend continues.

It is not only the producer who is suffering. Farm workers are also finding it increasingly difficult to come out on their salaries paid. It is a vicious circle. Farmers cry foul on reduced and unsustainable pricing receiving unrealistic prices for their commodities, and are pressurized to pay more for farm workers. Do the sums. The calculations are not making sense. 1 plus 1 no longer makes 2. These issues are compounded by aggressive Trade Unionists demanding higher wages, simply not understanding that the only way the farmer can balance his books is to employ less workers. This is not good for a Country with an abysmal lack of employment record.

CFU have invited many youngsters to attend the CFU open forum meetings, to hear for themselves what is being done on their behalf or more so, on the behalf of their "fathers" who wait patiently for news of "compensation". Indeed, if the feelings of our young farmers are not heard, how do they expect the CFU to attend to their needs or to represent them at higher levels of Government where it is hoped that their views, fears and plans are heard and taken cognisance of. One thing is for sure, that is if their



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voices are not heard, how do their ideas and aspirations move forward? It is simply not possible to go it alone.

To this end I would like to thank the CFU executive and those in the office for their continued hard work under very trying and often unrewarding times. The CFU President, Andy Pascoe has taken the initiative to go out and meet the people and put the Union's case out there. The response has been very encouraging and positive. Most Regions have been visited. Manicaland is one that does need a visit soon to re-engage with our farming community which is very diverse compared to other Regions around the country.

Commodities

It will be difficult for me to deal with the Province on a district to district level; so much of what I say will be a generalized observation. Manicaland is blessed with most likely the most diverse range of cropping and products compared with any other in the country.

Forestry

The two major players in this industry are Border Timbers and The Wattle Company. Both are facing huge challenges, the major being the settlement of people on once highly productive forest estates ranging from Chimanimani to Nyanga with scatterings in between. Some are legally settled whilst others are simply squatting. The mass destruction of trees being cut down prematurely is a sight to behold. Worse still is the fact that forest fires indiscriminately lit for hunting purposes or of clearing land on prohibitively steep slopes for crop production is inexcusable. Credit must be given to those foresters who soldier on regardless and who are trying their best to reestablish these destroyed forest estates and plantations.

Bananas

Bananas continue to be grown with a reasonable amount of success. New plantations are being established in the lowveld area around Middle Sabi, Chipinge and the continuation of production in the Burma Valley area. Most of the new plantations are the work of Matanuska pioneered by the Hildebrand's and with investment from Malaysia. Small Scale participation and investment is also very encouraging.

Potatoes

This crop has expanded considerably over the years as a "go to" crop which can be seen for sale on the road sides throughout the country. However, potatoes deserve a mention here as most of the seed potatoes are grown in Nyanga which of course is Manicaland Province.

Fruit

Apples are the major fruit grown here with stone fruit following close behind.

Maize and Wheat

Although not the country's major maize producing province, Manicaland does however have a large amount grown. Much needs to be done to ramp up the production of wheat as the country is way below its potential in the production of wheat. The ZESA supply situation experienced throughout the country is a major concern for wheat production in Manicaland. Having said this, the wheat producers in Manicaland must be congratulated for continuing to produce good yields and quality grains despite these major challenges.



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Another challenge being experienced is the large amount of cattle straying into these crops unattended or in some cases actively herded into wheat crops, since most grazing has been destroyed by veld fires. Most fires occur during the dry winter season when wheat is produced.

Tobacco

Once again, an indifferent rainy season has produced varying results. The Highveld areas of Headlands and Macheke seem to have done reasonably well achieving good yields and reasonable prices for the commodity. Lower areas of Odzi, Nyazura and to some extent Rusape, have had very mixed results.

Of major concern though, is the deforestation of our indigenous trees in these tobacco growing areas. Soon there will be vast tracts of no trees at all as wood is the fuel of choice for curing the "Golden Leaf". A major reforestation plan needs to be implemented or legislation passed the sooner the better. Small areas of reforestation can be seen along the main Mutare/ Harare road, but one cannot help feeling that this is window dressing. Tobacco Growers have an extraordinary amount of money levied directly from the floors by TIMB upon sale of their tobacco under the guise of a Reforestation levy. Little or no evidence can be seen of any activity in this regard. Large nurseries need to be established in every tobacco growing region using these funds, and made available free of charge in order to encourage wood users to plant their own sustainable gum plantations thereby obviating the desire to destroy indigenous trees. Much more effort is required and in larger areas if Zimbabwe is to recover from this travesty. Tobacco companies themselves are largely responsible for this destruction and need to be showing much more commitment to reforestation than mere lip service. How about levying the tobacco companies who make large fortunes out of the "Golden Leaf" and thereby taking pressure off the forever levied producer?

The instances of tobacco re-growth/non stalk destruction are of major concern. The powers that be seem to be powerless in their ability to bring this under control. Years and years of strict control by ICA's and institutions like the TRB are coming to nothing now as these strict laws are indiscriminately ignored. This WILL be to the peril and the demise of the tobacco industry.

Cattle

One no longer sees the large herds of commercial cattle grazing in paddocks along the main highways, rather, we see small herds of cattle grazing along the road verges where some green grass may be seen, whilst the rest of the country side is a mass of burnt out grazing. Once again, fires have been some of the worst encountered this year and this needs to be brought under control.

I have touched on some of the major commodities and apologize for any which I have overlooked.

Dams and Water

Major dams throughout the province have recovered well. Osborn Dam from nearly empty last year due to deliberate draining of the reservoir to carry out repairs, recovered to 80% of capacity by the end of the season. Lesapi Dam looks full from the road but is likely to be dropping rapidly due to the release of irrigation water to the low-veld sugar estates. However, smaller farm dams have struggled this year largely due to a below average rainy season. The irrigated tobacco crop may suffer a reduced hectarage as a result.

Long range weather reports predict a normal to above normal rainy season for the province. I am not too sure about this. An extremely cold October has me worried!

Cyclone Idai



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Disaster struck the province in March this year in the form of possibly the worst cyclone ever experienced in the History of this Country. Many lives were lost as the cyclone struck at around 7 pm at night thereby exacerbating the tragedy. Whole villages were washed away during the night as rain gauges recorded in excess of 1000 mm of rain overnight. There were no escapees. Roads, Bridges, Schools, Forests and homes with the occupants seeking shelter from the onslaught, were washed away. The Chimanimani community must be commended for their extraordinary efforts in coordinating the relief efforts and assisting those in desperate need of rescuing, often found clinging to trees or stranded in islands awaiting much needed assistance. The Zimbabwe community must be commended also for organizing an amazing collection of “anything”, food, clothes, blankets, medicines.....whatever they thought may be useful in their relief effort. FANTASTICALLY DONE ZIMBOS.

ZESA

The district, like many others throughout the country is reeling from the power shortages currently being experienced. To compound the issue, the blatant theft of assets like transformers, conductor wire and switchgear amounts to economic sabotage. Punishment for those apprehended should have prison sentences commensurate with the gravity of this crime. Large amounts of foreign currency are required to replace these assets. The country cannot afford this additional unnecessary expense, let alone the farmers who are often having to replace at their own expense.

Politics

The province has been relatively quite as far as farm disturbances and politics are concerned. Some farmers have received High Court rulings in their favour, to remain on their properties with the key words being “production, production, production.” However, there are still the odd disturbances by ill-disciplined elements wanting to impose their own rules but these seem to be dealt with reasonably rapidly when reported.

Summary

Having compiled this report, it would be remiss if I did not state that all is not well out here in the districts and morale is low. Farmers are under enormous pressure to remain viable under the current economic environment. There is a definite need for a different direction to be taken and soon. Many farmers we meet are defeated and question their very survival and wisdom in continuing to fall into the abyss. It remains for me to wish all the farmers throughout the country, bumper harvests, peace and stability.

B.A. Hacking

Manicaland Province

MATABELELAND REGIONAL REPORT 2019

WEATHER: The 2018 – 2019 rainfall was below normal. MAT South recorded the lowest. Deficits in some areas as low as 45% of average rainfall. Parts of the Marula area in the Plumtree district received normal rains. MAT North recorded below average rainfall but not as severe as in the south. Due to the poor rains most parts of North and South Matabeleland have reported very little surface water and a huge shortage of pasture. Hwange National Park have reported water shortages and animal deaths due to the drought as animals are coming from Botswana into the park looking for water.



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CROPS: Most areas report of between 10% to 20% only of off take from the fields and some areas report a total crop failure. Market gardening poor, as sales are low due to the lack of buying power of the average Zimbabwean.

CATTLE: Cattle prices remained depressed for the better part of the year as the average Zimbabwean is unable to afford meat. Due to the drought and high stock feed prices we are seeing large amounts of cattle deaths as many producers cannot afford feed as well as the shortage of pasture.

GENERAL: Moral is at an all-time low as the majority of people are struggling to survive the harsh economic conditions, shortages of cash, power cuts and the rising costs of all commodities. This has resulted in growing discontentment amongst the average Zimbabwean.

J.M. Crawford
Matebeleland Representative

COMMODITY ASSOCIATION REPORTS- 2019

ZIMBABWE CROP PRODUCERS ASSOCIATION - CHAIRMAN'S REPORT 2019

No crop commodity meetings were conducted this year, however, the Crop Producers Association has been represented at most high level meetings with both Government and the Trade by myself with the assistance of Angus Guthrie the Provincial Chairman for Mashonaland Central. We have also dealt with many of the issues affecting the various crops. For the purpose of reporting to Congress, crop issues have been covered under the Agriculture Information Service Department Report. I will be seeking a mandate from Congress to resuscitate Joint crops commodity associations in the coming year under the leadership of an interim Chairman.

Andrew Pascoe
CFU President/Crop Producers Association Chairman

CATTLE PRODUCERS ASSOCIATION REPORT FOR 2019

There is no functional national Cattle Producers Association. There have been a number of moves to create such a body through past and current initiatives to boost the livestock value chains under the ZAGP, (Zimbabwe Agricultural Growth Programme) funded by the European Union. I therefore appeal to active producers to step forward to ensure proper representation and the resuscitation of a National Cattle Producers Association.

There remain many crosscutting issues that affect cattle producers:

SEASON AND RAINFALL/ DROUGHT. The southern and western parts of the country suffered extreme drought over the previous season. In the north, there is shortage of surface water and no bulk in the un-burnt grass.

FIRES, (MAN-MADE DROUGHTS) are a constant problem destroying the environment and Zimbabwe's cheapest AVAILABLE FOOD SOURCE. Our national pregnancy rate results are below 50% because of this continuing Man-Made Drought. We cannot hope to restock the national herd with these low conception rates.



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Fires are tantamount to stock theft. The breeding herd has no food, how do we expect it to conceive, how are we going to restock the National Herd? Education programs are essential but the Environmental Management Agency and the Zimbabwe Republic Police have proved to be ineffectual in the control of wanton burning. I feel there should be effective and enforced legislated heavy penalties to arrest arsonists.

EASE OF DOING BUSINESS. Cattle producers are bearing the brunt of supporting service industries once again. Agricultural Marketing Authority are collecting SI 129. These include levies on slaughter fees from all registered abattoirs dating back to April 2018. In consequence meat grading fees have just increased. The reality is that primary producers will carry the brunt of these extra costs of doing business. Little progress has been made in regard to the recommendations to improve the ease of doing business in Zimbabwe.

VETERINARY. Dips vet and meds are in short supply and this has contributed to the considerable loss in livestock through disease. Suppliers are being hit by the Shortage of Forex and inflationary pressure. Dipping throughout the country is sporadic, as a result there are tick borne diseases throughout Zimbabwe.

There has been a report of an outbreak of Anthrax in Gokwe There are new out breaks of Foot and Mouth Disease in Masvingo and Matabeleland North. Botswana has withheld delivery of FMD vaccine. Dairy farmers are importing their own FMD vaccine. There has been progress in the construction of the Gonerezhou game fence where 69kms has been completed.

Recordings of national cattle slaughterings indicate numbers are decreasing. We believe the National herd could be as low as 3.5million head, but there is little proof. Anecdotal evidence suggests that slaughterings at some large abattoirs are down 70%. ZHB has organised a Beef School in Bulawayo in October 2019. There will be a good line-up of international speakers and over 150 participants have registered.

In conclusion I would again appeal to producers to a get functional Cattle Producers Association going again.

Mark Hook
Cattle Commodity Chairman

AGRICULTURAL RECOVERY AND COMPENSATION (ARAC) REPORT- 2019

Over the past two decades and as each year passes, we Zimbabweans seem to lurch into yet another crisis. There is a strong sense of Déjà Vu, which is not amusing.

I do not wish to bombard you with a report of doom and despondency, there is too much of that about. Much of it is inescapable. We are footing the Bill for decades of greed, criminal mismanagement andwell.... pretty much any other type of misdeed you can name.

So may I rather build on the positives of living in our beautiful country amongst courteous and friendly peoples who in most cases find themselves considerably worse off than ourselves? Just take the water deficit situation in our capital City.



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The ARAC Committee has met five times in the past year. I am extremely grateful to the Committee members who have so willingly attended these meetings. It is with no small measure of pride that your committee's contributions, to the ongoing Compensation dialog, have invariably been adopted by both the CFU and the CSC.

Not only did ARAC propose the formation of what has become the Compensation Steering Committee in 2016, as acclaimed by this forum at that time, but also ARAC has persuaded the CFU to endorse the CSC's work since then.

A significant part of the CSC's work this past year has been to secure the Interim Relief so many of us have been desperately anticipating. Sadly the long awaited disbursement of what was significant, has become a smidgen of what was envisaged.

Last year, reviewing the national Budget, we discovered that \$53 million had been allocated to the Ministry of Agriculture, Water affairs, Climate and Rural Resettlement, to supposedly compensate some 50 farmers. (The 2018 Blue Book Line 2,801 of 10,123 lines). This targeted 50 was a huge improvement on the 10 farmers actioned in 2017 and the 25 targeted in 2018. But at this sort of rate (i.e. 50 per year) it would take over 100 years to complete the exercise of compensating the approximate 5,000 titles remaining. I guess we will be well passed our "Sell-by date" by then. ARAC, through the CSC immediately requested the "New" Minister of Finance to reallocate this budget line and offer assistance, in the form of Interim Relief, to each former title holder; rather than the few chosen 50. The Minister to his credit agreed. This revived the ARAC program started in 2015 aimed at offering real USD2.000 (as it was then) per month until compensation is complete. The Minister acceded to our request and the exercise began. The CSC together with the CFU and Valcon engaged with various Government officials and Ministers, and what a mammoth task it has proved to be. Initially we hoped, rather naively, that a list of Names and Bank Accounts would be sufficient. It soon became clear that this exercise was tangled in the embodiment of bureaucracy with each of several different Ministries wanting to participate and claiming oversight.

The process of disbursement has been and remains protracted but it has identified three major steps forward that we must build on.

1. The exercise, however modest it has become, has, I believe the merit of indicating the acknowledgement by GoZ to settle the debt it owes to dispossessed Farmers.
2. The Exercise has identified several complications involved in proving our claims. Valcon has very largely and with great professionalism encased records of your assets in its Data base and has a template of values at credible realistic values for their registered clients. However what it cannot do, without your vigorous assistance, is to declare who **precisely** is to receive the proceeds. When the time comes, and it will, distribution of the funds will only take place after a meticulous audit of the recipients identity be they individuals, Company's shareholding or Trusts Etc. The title deed holders may have a few complications. THE TIME TO DEAL WITH THESE ISSUES IS **NOW**. For example perhaps the deed holder is a company that has failed to amend its shareholding (Registrar of Companies) and perhaps one or more of the Shareholders is deceased intestate, or sadly subject to family feuds of some kind.



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3. And of course once this disbursement is complete those so desperate for something to live on will have been helped a bit, albeit not nearly close to what we had targeted.

The C S C recognises these complications and is endeavouring, with CFU and Valcon's assistance, to establish firstly what the various organs of GoZ will require in the form of documentation and secondly what the funding agencies may require, so that we can recommend to farmers what they should be prepare to have on hand.

At this point I would like to express my sincere appreciation to those Farmers who stood aside from this relief application allowing our original \$2,000 p.m. to be more than doubled. Of course this value has collapsed with the RTGS\$, as has our economy. I would also like to record my appreciation to those who have received relief and who have paid over the requested commission of 2% to the CFU/ Valcon fund to assist them to continue with their tasks.

In my experience, and to be fair, generally a majority of our civil servants are dedicated and committed to providing the best service they can. However their efforts are blighted by lack of capacity and over reaching all is the "fear" under which they, indeed all of us to some extent, operate. They know that unless they comply with directives given to them by bigoted, unscrupulous, politically appointed senior authorities they will lose their jobs, pensions and perhaps much worse.

However there is change in the air but it may be a little while yet before the wind gathers all its full strength. It has been abundantly clear that for some time now reform must not only be talked about but also implemented. The message is unequivocal. It is acknowledged by our National President that for any sort of improved future investment in Zimbabwe, PROPERTY RIGHTS MUST BE RESPECTED, and as The President announced to the world at Davos, first on the list is Compensation to dispossessed farmers who **MUST** be paid. To do this there must be an agreement on the Global Values. This is proving to be difficult, for in as much as the Ministry of Agriculture's valuers may mainly agree with Valcon the Ministry's Compensation Committee is politically appointed comprising mainly beneficiaries themselves and WITHOUT farmer representation it is unlikely they will give a balanced hearing.

ZIMBABWE'S CRISIS

Most of you will be aware of the concept of "Tragedy of the Commons". Briefly, if no one owns a pasture no one cares for it and each person will exploit their access regardless of the grazing's deteriorating condition. Like our communal lands grazing, our plundered timber resources and more globally our polluted and over fished oceans. If it had secure tenure someone would care. THIS IS ANOTHER REASON PROPERTY RIGHTS ARE SO IMPORTANT

On my way home a week ago I tuned in the Radio to 100.4 FM, to Capital radio's talk show. The subject was Air traffic control and Air Zimbabwe's Failure. The guest speaker, an Indigenous Zimbabwean Airline Economist whose name escapes me, explained during an hour's program, that he together with many of the young Air Zimbabwe's Technicians, employed in the early 1980s, and had been forced out of employment together with a host of experienced senior and junior managers. Most of these highly qualified men had been snapped up by various other Airlines and Air Traffic control agencies outside Zimbabwe; indeed, several had ascended to professorships at Universities and one to a Head of Dept lecturing in Airline Economics in a northern university in UK. Such was the result of the push by the politically connected, to emplace their retinue in positions of power and control, despite their having neither skill set nor experience for such responsibility. These men and women should be here at home



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building our future. The fear of losing jobs, pensions or other brutalities has led towell we all know what happened next.

It was interesting to me to hear this severe criticism openly over the radio on what has been perceived as a pro GoZ broadcaster. I think this is healthy; but, also and more essentially, interesting, because it is the archetypical narrative of most of our Ministries and Parastatals. That this issue can be so openly discussed speaks volumes and things maybe are changing?

The "FEAR" illustrated by this Guest speaker is all pervading in the Ministry of Agriculture and has stagnated and delayed disbursement of the interim relief so desperately needed by many of our colleagues.

Many important people are leading the discussions towards how imperative Property Rights are; emphasising how virtually all wealth creation (Production etc.) be it Farming, Mineral exploitation, Patents, etc., are entirely dependent on Secure Property Rights, and these must be upheld by sound Constitution and Local law enforced by independent Law Courts free of political interference. Without which the Zimbabwean people's efforts will continually be hijacked by the PREDATORY ELITE, who are immune from everyday personal responsibilities and hold penal impunity.

Unadulterated bankable tenure freely transferrable, without Ministerial veto or intercession is the **only way** forward for the nation.

Inequality before the law, racism, impunity for criminal transgressors, patronage, greed, bigotry and mafia type elite governance has to be stopped in its track and prosecuted. I can see no reason that lifestyle audits and unexplained wealth investigations do not take place immediately. Officials can even sit on the road recording Number plates (if they have any)..... Or drive around the Low density areas and examine the deeds to new palaces..!! Explain the wealth or return it to the ever pressed Tax Payer.

HOLISTIC APPROACH

In Late March of this year, a farmer's meeting was called at Northside Church. Most of you will have attended. At this meeting it was clearly explained the roles each of the Farming representative's organisations would follow.

VALCON

Valcon is an independent body of professionally aligned Estate Agents whose task is to create a credible, fair and accurate Database that can be universally acknowledged as the "Go to" documentation for all stakeholders.

Valcon is an example of Private sector efficiencies which Parastatals would do well to duplicate. This is largely the work of Shallon Bester and who together with Wendy de la Fargue, for the past two years have shouldered what has become the enormous task of presenting their Data in a suitable form acceptable to the GoZ. Their dedicated work particularly over the past six months is an example to us all and with these comments go my and ARAC's unreserved gratitude and admiration.

Tony Purkis heads up Valcon as MD and similar gratitude goes to him for his persistent leadership and patience ensuring the credible Global Valuation is foremost at Stakeholders meetings.

CFU and SACFA



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The CFU's and SACFA's task is to recreate a viable Commercial Agriculture for National wealth creation in the future; in addition to attending to our Former Farmer's needs. Which go hand in hand.

You will all be aware of the fragile financial position that the Union faces. It is critical that we all support the Union, and not least of all, by paying our dues. I cannot think of any honourable reason not to contribute your share be you ON or OFF farm.

I would like to commend our New CFU President Andy Pascoe for the exemplary manner, in-exhaustive energy, and the single-mindedness with which he has tackled the task over the past year.

He together with Ben Gilpin and Mike Clark, indeed all the CFU supporting staff have been engaged with the enormous task of finding a suitable future for Zimbabwe's Commercial Agriculture. This in addition recently, to the onerous task of combining with Valcon, to assist so many with acquiring some Interim Relief. Ben, I knew your family well, and they would be justly proud of you and your staff. Thank you

CSC

The Compensation Steering Committee is ably led by John Laurie, who is well known to you all. John has been at the forefront of the Compensation exercise which, still after 18 years, is his sole focus. Not a week goes by when he has not attended three or four meetings Lobbying, communicating with farmers or canvassing support. John has developed close relationships with so many Diplomatic and senior stakeholders. His never failing sense of humour has carried him through his own challenges and not once have I heard him talk of failure. For over eighteen years John has been urging all and sundry to see reason and most of us here today will have had private or group meetings with him. John, without you in particular we would be significantly weakened. Again from us all in ARAC and I am certain all in this hall today, may we express our profound gratitude "Thank you so much for the honourable way you guide us all."

Charlie Taffs and Harry Orphanides

I would particularly like to mention the sterling work done by Charlie Taffs and Harry Orphanides who have dedicated themselves completely to the task of ensuring the Interim relief is completed soonest. Sometimes they have had as many as four meetings each day! They have been outstanding in their efforts to engage with the Ministries involved. Thank you both again, from us all here today, and for your devotion to our Farmers. It has been through your perseverance that this exercise is taking place.

In addition to lobbying for compensation they have fashioned a credible mechanisms by which the Government can pay compensation at a manageable cost to the national budget. Indeed it may be said that in view of the New Constitution, declaring that the Government must pay compensation, at least for permanent improvements, in as much as this is agreed by the current administration, then the main issues will be between the Government of Zimbabwe and the international funding agencies which may wish to see a reinvigorated economy and the restoration of our wealth creating enterprises and all that cascades from such a settlement. But they will only help once we Zimbabweans met certain well publicised conditions. Both are applying their minds and energies to creating a path forward and they are being listened to by those with ears to hear.

Professional advice is expensive and funding can be elusive. Where we can all assist our representatives, is by ensuring that ALL our former neighbours and colleagues are PAID up members of the CFU and that they have registered with Valcon.



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The following bears repeating time and time again..... ARAC and CSC are conscious of our many other loses

Due a publishing error my report was not recorded at last year's CFU Annual congress, so I make no apology for reproducing it here,

So I repeat from my 2018 report, with a few updates.

No farmer "stole his farm", in point of fact, the vast majority of farms' ownership were transferred after our independence and with the particular approval of the Government of Zimbabwe through the issuance of Certificates of no present interest!!

We have often acknowledged that there were significant advantages over the years prior to independence and we all know and accept there had to be Land Reform. The tragedy is how it was politically implemented and manipulated.

As a consequence of the Fast Track Land Reform:-

Dispossessed farmers aged 60 years at GOZ acquisition are now generally 79 Years old!!! :-

I.e. they are:-

1. 17 years older
2. Unemployed
3. Of frail health
4. Without funds
5. An ever greater burden on their families and humanitarian agencies

IN ADDITION TO THE ABOVE FARMERS:

- Were obliged to pay SI 6 of 2002 (Gratuities which were formerly the responsibility of the PURCHASER)
 - Lost their Home
 - Lost their Pension (generally identified by livestock and the property itself)
 - Lost their Businesses
 - Lost their Cattle or wild life (Movables)
 - Lost their Tractors and Equipment (Movables)
 - Lost their regular income from their business
- Much of which led to enormous stress leading to health issues and often death

And of course let's not forget in many cases Farmers were beaten, their homes looted and trashed and sadly not a few farmers were murdered

THE DELAY WITH PAYMENTS HAS NOW LASTED UPTO 19 YEARS

IN ADDITION farmers have had to bear the burden of:-

THE COST OF LAWYERS

THE COST OF REMOVALS

THE LOSS OF INTEREST or INCOME

THE LOSS OF CREDIT LINES

INCREASINGLY POOR HEALTH



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ADDITIONAL Med Aid and Insurance PREMIUMS

In particular the markets for movable assets collapsed because of the over-supply, and so Farmers could only offload their movable assets at “rock bottom prices” further exacerbating their dire situation.

EFFECTS OF DESTITUTION HAVE RESULTED IN THE LOSS OF THE ABILITY TO PAY FOR food, rent, med aid, medical Etc.

BEARING IN MIND THE ABOVE IT WOULD BE SCANDALOUS TO MAKE FARMERS BEAR THE ADDITIONAL COST OF SEVERE DISCOUNTS OF THE ACCURATE VALUES ASSESSED BY VALCON

Some 15,000 A2s have absorbed close to half the Resettled land. We are all aware that our farms were generally divided between the beneficiaries, some received just bare land, others some section of irrigable land, some the dams and others, usually the most politically connected, received our homes. So is it any wonder the recipients of improvements are fighting to ensure they pay nothing for their benefit? In numbers the amount to probably about 3,000 beneficiaries who have the Lion’s share. Most produce minimum crops and they expect the vast majority of the remaining 15,000,000 Zimbabweans to pay for their acquisition through their Taxation Etc.

I would urge Govt to emplace a path for our young Farmers to follow so that they may be able to become the Guardians of the future of our land. I am particularly alluding to the former AFC’s Tenant Farmers scheme.

So many years of experience are sitting in front of me this afternoon I could pick a team from our midst to set up such an AFC scheme so easily. I implore Government to include us in the future agricultural planning and take advantage of our experience to the good of all not just a few.

To Barry Munroe, the Chairman of Farm Families Trust, I wish to thank you and your committee for all your efforts in supporting and helping our elderly and less fortunate members in their time of need. Particular mention must be made of those generous people who so kind-heartedly have donated to this fund trust.

It only remains for me to thank you, our ARAC members and my committee members Andrew Pascoe (our Ex officio Vice Chairman), Byron Dardagan, Harry Orphanides, Robin Wryly-Birch, Rob Beverley, Kerry Kay, John Perrot and Richard Harvey, Richard Taylor, Ian McKersie and Tok Arnold for their time, consistent effort and support and dedication to the cause all for no financial reward.

Thank you for your attention

Your support is so appreciated.

Patrick Ashton
Chairman ARAC

AGRICULTURAL INFORMATION SERVICES DEPARTMENT REPORT – 2019

INTRODUCTION



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This paper serves to give developments that have occurred in the economy and the agriculture sector since the last Congress in September 2018. It also contains production data for the 2017/18 season and estimates of agricultural output for the current 2018/19 season

ECONOMIC DEVELOPMENTS SINCE THE LAST CONGRESS

Global economic growth is expected to slow down to 3.2% in 2019, from an initial projection of 3.5%, weighed down by sluggish investment and risks related to ongoing trade wars, delays and uncertainties on Brexit, climate change, renewed financial stress, as well as heightening geopolitics.

In Sub-Saharan Africa, a modest growth of 3.4% is projected in 2019 up from 3% recorded in 2018. Growth is driven mainly by non-resource rich countries. Growth prospects, however, face risks related to climate change, especially on the Southern parts of the region, debt vulnerabilities, low foreign reserves, growing public debts and conflicts

The Zimbabwean economy will contract to -2.1 percent in 2019 this was a downward revision from the initial projection of 3.1 percent. The downward revision of economic growth expectations come owing to negative natural conditions, which badly affected a number of sectors particularly agriculture and power generation, coupled with inflationary pressures, foreign currency shortages and limited external financial support. Growth this year will also be affected by the current power outages.

Economy

The last half of 2018 was very difficult due to a tough operating environment brought up by the austerity measures by the Finance Minister. Since October 2018 the bond note as well as RTGS balances' value has fallen significantly against the US\$ and other key currencies. Prices of inputs have often been pegged in US\$ prices and have more than tripled in bond note terms. Foreign Exchange Premiums on the parallel market have continued to increase and this has had negative effects on inflation. The RBZ Governor through the February 2019 monetary policy merged RTGS balances with bond notes and coins to form a currency called RTGS dollars, Statutory Instrument (SI) 33 of 2019 was gazetted to give the currency legal standing. The RBZ pegged the official USD to RTGS\$ rate at 2.5 which has since moved up to a rate of close to \$1:15ZWL which is lower than the informal rate which seems to be dominant and stands at around \$1:19ZWL.

These developments have seen continued erosion of consumer purchasing power. According to ZIMSTAT (2019) average consumer prices increased by 9.1% in December 2018, a slight deceleration from the 9.2% monthly inflation registered in November 2018. Consumer inflation for the full year 2018 closed at 42.1%. The annual inflation rate has been on the rise since the beginning of the year. It opened the year at 56.9 % in January, before edging to 59.4% the following month. The annual inflation rate for the month of June 2019 rose sharply by 77.75 percentage points to 175.66% from 97.85% in May 2019. Zimstat had to defer publication of year on year inflation, while building up data of prices in mono-currency for a period of 12 months to February 2020 after the abolition of the multicurrency system. The massive increases in prices attributable to the three-tier pricing model adopted even by sectors that are regularly allocated foreign currency by the RBZ are a cause for concern. The inflationary environment has seen a rise in the cost of living and deteriorating standards of living. This has prompted need to prioritize and realign expenditure to basic commodities with limited savings.

Following the exchange rate movement and the introduced foreign currency retention policy it has become expensive for companies to purchase their inputs needed for production as most inputs are imported. The current cost of production models are unsustainable. Input costs quoted in US\$ are high



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in Zimbabwe. Companies continue to suffer ineffective production due to obsolete machinery which underpins production as the machinery needs to be repaired or replaced with new technologies. High costs of inputs are affecting companies who are failing to make profits as their commodity prices have not increased with the same magnitude as the exchange rate. The increase in costs of production has forced many companies to lay off some of their employees. Liberalizing or floating the exchange rate, without ring-fencing RTGS balances has had the disastrous consequences of devaluing people's balances. The monetary policy has effectively devalued people's salaries.

The continued existence of a parallel market for foreign currency which importers require to finance the purchase of most commodities is fueling an environment for speculative tendencies that the market continues to face due to uncertainty. Speculative and profiteering tendencies; pass-through effects of parallel market premiums on foreign exchange; shortages of some imported basic commodities were responsible for the upsurge in inflation.

Non-Performing Loans (NPL) keep increasing year after year as indicated in the 2019 monetary policy statement. Reserve Bank of Zimbabwe (2019) reported that credit risk in the banking sector portfolio has increased as reflected by the ratio of NPLs to total loans of 8.25% as at 31 December 2018, from 7.08% as at 31 December 2017. NPL are expected to worsen due to the current tough business operating environment. The Zimbabwe banking sector has regrettably been in such an unpredictable macroeconomic environment for a long time and this has compounded to the rising credit risk. The country should work hard to boost the confidence levels to make the inter-bank forex market system work.

A report from the United Nations Conference on Trade and Development (UNCTAD) shows that Zimbabwe recorded Foreign Direct Investment (FDI) inflows of US\$745 million in 2018, up from US\$349 million the previous year. The improvement in the FDI flows into the country over the period under review can be attributed to the 'Zimbabwe is open for business' mantra. In line with the mantra, the Government has implemented a number of initiatives to boost FDI, including amendment of the Indigenization Act to reduce ownership restrictions; opening up other sectors to unrestricted foreign ownership and increasing the opportunities for foreign direct investments. Although the inflows have improved the figure compares unfavorably with the country's neighbours such as Mozambique and South Africa which registered \$2.3 billion, and \$3.8 billion FDI inflows respectively. Lack of policy consistency, indigenization law, disregard for property rights and the unwillingness of authorities to deal with corruption have often been identified as factors dissuading investors from the country.

Agriculture

Agriculture growth is expected to contract by 15.8% in view of unfavorable 2018/19 weather conditions, exacerbated by the occurrence of Cyclone Idai, which destroyed crops, livestock, agricultural and other critical infrastructure in some parts of the country. Output for most crops was, therefore, depressed despite an increase in the planted area. Similarly, livestock production is expected to be subdued owing to disease outbreaks and drought-induced poor pastures across most of the country.

Mining

Mining remains the major source for export earnings, GDP and employment. During the first half of 2019, the sector contributed US\$1.3 billion, which is 68% of the total exports of US\$1.9 billion. The sector, which experienced recovery during the first quarter of 2019, apparently faced headwinds during the second quarter, as evidenced by output losses in most major minerals such as gold, platinum,



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palladium, diamonds, nickel, chrome and coal. The major constraints are being imposed by foreign currency shortages and the intermittent electricity supply.

Manufacturing

The sector's capacity utilisation is expected to fall to 34.3% this year from 48.2% in 2018, on the back of worsening foreign currency shortages and as a result of no improvement in the implementation of economic development policy.

Financial sector

The banking sector remained adequately capitalized, with aggregate core capital of ZWL\$1.69 billion as at 31 March 2019, representing a 6.92% increase, from ZWL\$1.58 billion as at 31 December 2018. As at 31 March 2019, all banking institutions were compliant with the prescribed minimum capital requirements. Credit to the private sector which has remained largely subdued, grew on an annual basis by 16.20%, from ZWL\$3.80 billion in May 2018 to ZWL\$4.4 billion in May 2019. This growth is marginally higher compared to 8.4% recorded in May 2018.

External Sector

The current account, for the first time since the adoption of the multicurrency regime in 2009, registered a surplus in the first quarter of 2019. A surplus of US\$196 million was registered in the first quarter of 2019 compared to a deficit of US\$491 million for the same period in 2018, constituting a major improvement in the current account. This reflects a sharp contraction in imports through import management, against a moderate increase in exports in line with export promotion measures under implementation.

AGRICULTURE AND WEATHER UPDATE

The 2018/2019 season was characterized by late on-set of rains across the country and false-starts in the southern and south-eastern parts of the country, this affected the crop establishment. Long dry spells in January and February negatively affected the planted crop. Cyclone Idai, which hit the country in mid-February, caused severe damage to crops and agriculture infrastructure in Manicaland and Masvingo provinces. However, it improved crop condition in Mashonaland East and Central.

The meteorological department of Zimbabwe has forecasted normal to below normal rainfall for the 2019/2020 season. The start of the 2019/2020 rainfall season (Oct-Dec) in the southern part of the country is most likely to be delayed and erratic with below-average cumulative seasonal rainfall. Masvingo and the extreme southern parts of Manicaland and bulk of Matabeleland South will expect normal to below normal rainfall. The seasonal rainfall forecast for October to December 2019 in Harare, Mashonaland East, Mashonaland West, Manicaland, Mashonaland Central, North eastern part of Midlands would receive normal to above normal rains. From January to March 2020 all areas should expect normal rainfall to below normal rainfall. The department has advised farmers with irrigation facilities not wait for the main rains to fall. They can plant any time now, taking into account the high temperature needed for germination. The department also says violent storms, prolonged dry spells, flash floods and tropical cyclones cannot be ruled out as the season progresses. The department also advise on the need to continue with water harvesting programmes.

CROP OUTPUT ESTIMATES

The estimated maize production stands at 776 635t which is 54% less than the 1 700 000t obtained during the 2017/18 season. Maize average yields decreased by 51% to 0.48t/ha in the season from 0.99t/ha in the 2017/2018 season. Sorghum production is expected to be 40 215t, finger millet 6 947t



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and pearl millet 28 047t. The combined small grains production decreased by 44% compared to 2017/2018. Total cereal production is standing at 851 844t against a national cereal requirement of 1 800 000t for human consumption. Cereal requirement for livestock is estimated at 450 000t. Imports are expected to cover up for the deficit in the cereal requirements.

Tobacco production this year surpassed last year's record breaking deliveries after 259kg of tobacco were delivered compared to 252.6 Million kg delivered in 2017/18 season. So far Zimbabwe has exported 103 million kg of flue cured tobacco worth US\$392 million, with South Africa and China being the major buyers of the golden leaf.

Cotton production is estimated at 66.5 million kg compared to 130.3 million kg in 2017/2018 season. Soya bean production is at 60 068T compared to 59 772T in 2017/18 season. Groundnut production decreased by 44% from 127 202 T in the 2017/18 season to 70 902 T this season.

Production of pulses and tubers remains very low. This season, sugar beans increased by 55% from 21 320t to 9 528T while cowpeas decreased by 23% from 16 380 T to 12 655 T. Sweet potatoes decreased by 73% from 321 662T to 88 248 T. The huge decrease in the production of tubers and legumes is a result of erratic rainfall at the beginning of the season and long dry spells in January when these crops are normally planted.

This winter seasons cropping has been disastrously affected. The shortage of water and the intermittent and erratic supply of electricity have considerably reduced the total hectareage for wheat and barley plantings. About 17 000ha of wheat were planted against a target of 75 000 this year. Shortages of diesel and its high costs have compounded the problem even where producers have the ability to provide backup power in the form of generators. The low water levels in Kariba dam, poorly maintained electricity distribution grid, together with the ever increasing vandalism and theft of ZESA infrastructure has been a major limitation to growth and development in the agriculture sector.

LIVESTOCK OUTPUT ESTIMATES

Generally, the body condition for all livestock classes ranged from fair to good in all districts. Pastures were available in most districts, except in some districts in Matabeleland North, Matabeleland South and Masvingo. Water for livestock was available in most districts as a result of Cyclone Idai induced rains which improved the water situation in most water bodies in Mashonaland provinces, Manicaland and parts and Masvingo and Midlands provinces. However, there are some areas in Matabeleland North, Matabeleland South, parts Masvingo and Midlands provinces may experience inadequate supplies before the next rainy season

Dipping is generally erratic due to a critical shortage of dipping chemical., with priority in the allocation of the chemicals being given to areas that were severely affected by the outbreak of Theileriosis with over 50 000 cattle deaths reported in areas like Goromonzi, Chivhu, Bindura, Buhera, Hwedza, Gutu, and Mhondoro-Ngezi.

The national calving rates remain very low and are ranging from 38% in communal areas to 45% in the large scale commercial sector against a national target of 60%. The number of beef cattle slaughtered increased by 2% from 261 191 in 2017 to 266 220 in 2018. Annual milk production has continued on an upward trajectory since 2015 as the national dairy herd continues to grow. Total production in 2018 rose by 13.6% to 75.4 million litres up from 66.4 million litres in 2017.



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The major tick-borne diseases reported were Babesiosis, Anaplasmosis, Heart water and Theileriosis. The diseases case was fatality rates were for Babesiosis 36%, for Anaplasmosis 21%, for Heart water 35% and for Theileriosis 66%. FMD originating from Mozambique was detected in the north-eastern part of the country (Rushinga) for the first time and eventually spreading into seven of the nine Mashonaland Central districts, Mashonaland East's Mudzi and UMP districts and some few locations in Hurungwe and Makonde districts in Mashonaland West province.

The poultry industry significantly rebounded in 2018 following a significant decline induced by the outbreak of Avian Influenza in 2017. Broiler Day Old Chick production averaged 7.6 million chicks a month with a total annual production of 90.8 million in 2018. Large scale average monthly egg production declined by 15 % to 1.2 in 2018 compared to 2017 while in contrast production in the small scale sector grew by 5% to 1.8 million dozens.

Cumulative pig slaughter figures for 2018 were 173 694 which is 12% higher than the 2017 figure of 155 181. The goat kidding rate stands at 98% against 120%. The sheep lambing rate stands at 65% against the national target of 100%.

PRODUCTION VIABILITY AND INPUTS AVAILABILITY

Seed companies have confirmed that seed is readily available for the coming season but uptake is very low compared to other years. On average a 10kg bag of maize seed is costing \$379.50. The fertiliser industry confirmed that they have stocks enough to cover half of the season's requirements and are confident that they will be able to meet the demand by importing to fill the gap. Like in the seed situation fertiliser companies have confirmed that uptake of inputs for the 2019-20 summer cropping season is low compared to the same time last year. Most farmers are expected to turn to Government inputs schemes due to high costs. Fertiliser prices are averaging \$600 for a 50kg bag of AN and \$450 for a 50kg bag of Compound D.

Most crop chemical supplies import their products and they have been finding it difficult to meet demand as they always fall short of the much needed foreign currency. However, uptake is very low because they are expensive and some farmers cannot afford them.

Stock feeds are available on the market however, prices of most raw materials increased sharply in 2019 translating into increases in prices of all stock feeds compared to 2018.

Cost of raw water for irrigation has been revised upwards and the new ZINWA charges are now \$18.60/megalitre for Communal farmers, \$12.40/megalitre for A1 farmers and \$31/megalitre for both A2 and commercial farmers

CONCLUSION

Zimbabwe has opportunities requiring minimal additional investment to realize medium-term growth targets. In particular, measures are needed to increase transparency in the productive sectors, strengthen property rights, reduce expropriation concerns, control corruption, and liberalize the foreign exchange markets. Regeneration of civil society and a renewed engagement with political actors in a positive social contract will accelerate political reform. Given the vast natural resources, relatively good stock of public infrastructure, and comparatively skilled labor force, Zimbabwe has an opportunity to revive its economy.

Antonnette P Chingwe



Commercial Farmers Union Of Zimbabwe Congress 2019

Chief Economist



Commercial Farmers Union Of Zimbabwe Congress 2019



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COMMODITY OUTPUT TABLE

TOTAL PRODUCTION OF MAJOR AGRICULTURAL PRODUCTS in ZIMBABWE (000 tonnes)																					
	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019*	
Grains and Cereals																					
Maize	2,043.20	1,476.24	498.54	754.00	950.00	750.00	945.00	697.00	417.10	781.25	819.25	895.00	833.00	798.00	1,200.00	742.20	511.82	2,100.00	1,700.00	776.00	
Wheat	250.00	314.00	186.50	120.00	121.65	134.00	170.20	64.55	25.55	45.00	41.00	48.00	33.70	24.00	58.70	60.00	62.00	75.00	80.00	100.00	
Sorghum	61.91	60.74	23.82	59.56	124.00	111.00	108.40	81.50	103.00	113.50	73.60	50.54	64.70	76.00	105.00	39.70	36.30	182.01	77.00	40.00	
Barley	32.00	32.00	58.00	50.00	36.40	43.00	53.50	32.00	24.50	33.15	40.50	25.80	37.70	46.20	18.70	18.00	18.00	11.00	11.00	11.00	
Small Grains (millets)	31.00	43.20	14.20	41.50	71.70	30.60	72.30	49.90	55.00	43.32	50.90	36.10	43.70	43.00	45.00	45.00	40.15	106.77	56.00	34.00	
Traditional Export Crops																					
Tobacco Flue Cured	236.13	202.54	165.84	81.81	69.00	73.39	54.25	73.39	48.72	57.00	123.00	132.00	148.00	166.60	216.40	199.00	202.20	188.90	252.00	259.00	
Cotton	353.00	280.50	195.67	159.50	364.20	196.30	207.90	255.00	223.02	210.09	149.90	195.00	342.00	133.00	114.00	105.00	32.89	74.00	130.00	67.00	
Oilseed Crops																					
Soya beans	149.94	175.08	72.41	70.26	71.00	54.00	54.80	67.60	51.20	43.30	57.30	59.00	70.50	76.90	80.00	57.90	47.83	35.74	59.00	60.00	
Groundnuts	190.89	171.78	58.56	86.50	64.10	57.80	83.10	126.80	116.55	44.46	136.70	97.50	108.20	130.00	132.00	88.90	73.71	139.50	127.00	70.00	
Sunflower	9.20	30.30	4.63	16.90	20.20	7.40	16.70	31.10	33.40	16.25	11.80	8.23	6.90	10.00	12.00	21.00	3.26	10.39	8.00	8.00	
Plantation and Industrial Export Crops																					
Tea	21.80	21.73	22.88	22.54	20.72	16.87	15.43	15.11	13.00	10.00	10.00	11.00	10.50	24.50	24.00	14.00	10.17	7.83	46.00	38.00	
Coffee	6.54	7.26	6.60	5.52	7.20	3.96	2.70	1.86	1.32	0.50	0.40	0.40	0.30	0.40	0.50	0.60	0.45	0.50	0.56	0.60	
Paprika	7.30	8.80	9.80	14.20	10.80	3.20	3.80	1.01	0.74	0.26	0.34	0.69	0.81	4.50	5.00	5.50	5.50	7.00	7.00	8.00	
Flowers	17.86	17.86	21.89	22.80	20.17	16.27	14.33	10.17	8.00	5.00	7.50	7.50	11.00	11.00	12.00	15.00	14.10	12.00	14.00	16.00	
Citrus	39.32	39.32	33.64	43.19	47.77	34.23	26.31	26.45	19.00	15.00	29.75	30.00	35.50	37.00	39.00	43.00	193.76	198.06	200.00	240.00	
Fresh Produce	10.22	10.22	7.51	9.64	10.24	7.28	4.95	5.33	4.00	3.00	3.20	4.50	6.50	7.00	8.00	11.00	10.00	13.00	14.50	15.00	
Sugar	538.00	515.00	581.00	502.74	422.30	400.00	446.65	400.00	380.00	280.00	300.00	333.00	372.00	420.00	445.00	412.00	544.00	490.00	600.00	750.00	
Livestock																					
Dairy	187.05	176.77	153.13	114.08	97.64	94.55	92.50	87.36	47.72	37.00	47.00	56.00	55.90	54.60	56.00	57.00	65.00	57.00	66.40	75.40	
Beef Slaughters (nos)	605.00	630.00	720.00	450.00	450.00	450.00	300.00	250.00	200.00	180.00	200.00	261.00	256.00	242.20	245.00	261.69	288.71	263.00	266.00	285.00	
* Estimates																					

LABOUR AFFAIRS AND ADVOCACY AND LOBBY REPORT- 2019

Introduction

The farmers are not operating in a vacuum and they are directly and indirectly affected by the exogenous factors which are the socio-economic, political, technological and legal factors in their farming operations. The running of any business in the country has been made difficult by clear cut challenges of the economy which is on the decline. The Commercial Farmers Union is continuously involved in labour related activities in the agricultural sector in quest to have harmonious, reasonable and positive industrial relations in the agricultural industry. The CFU is involved in wage negotiations, training, and provision of advice, education, and assistance in disciplinary actions of employees, resolution of illegal strikes and representation of members in their areas of need. This year has seen renewed efforts at the formation of a joint agricultural employers association and we are certain with in the coming year we will have established an effective body.

Labour Affairs Report

The Labour Affairs Department has been involved in various activities which always makes them ever busy. In the year that we have passed, it is important to note the following issues:

1. **Remuneration:** The wage have not remained static in the Agricultural industry, due to fastest changes of prices in goods and services the industry embarked on negotiations to try and cushion employees on economic hardships by salaries adjustments. The Commercial Farmers Union together with other employers' association members has been participating in wage negotiations for different sectors which were adjusted. The wage trends are noted in the table below:

Sector	Period			
Horticulture	Feb 2018: \$89	March 2019: \$131	July 2019: \$213	October 2019: \$ 365
General Agriculture	June 2018: \$80	May 2019: \$135	July 2019: \$195	October 2019: TBA
Kapenta	Sept 2018: \$153	Dec 2018: \$205	July 2019: \$ 300	October 2019: \$450
Tea	Sept 2018: \$145		August 2019: \$240	October 2019: TBA
Timber	Oct 2012 : \$150	In dispute until	August 2019: \$265	October 2019: TBA
Sugar Cane		May 2019: \$150	August 2019: \$250	October 2019:\$400
Agro	Nov2018: \$121	May 2019 :\$190	July 2019: \$265	October 2019: TBA

1.1 **Wage Affordability:** Wages affordability is being affected by the continuous wage increase and adjustments in the industry. Such wage adjustment are not necessarily commensurate with the production and revenue received. It remains an area of concern in the current unfavorable economic conditions.

2. **Disputes:** The notable cases of disputes of rights and interests related to labour had been recorded and resolved amicably.



Commercial Farmers Union Of Zimbabwe Congress 2019

2.1 **Dispute resolutions:** The Labour disputes referred to Commercial Farmers Union were in some instances resolved with domestic remedies. In worst case scenarios some disputes were referred to NEC and some referred to Ministry of Labour where the CFU legal affairs department was going to represent farmers at conciliation where most cases were then settled *in- toto*.

3.1 **Training:** Knowledge is power and it has been of paramount importance that farmers should also be equipped by information. The training at **Art Farm**, was done in conjunction with the NEC, and GAPWUZ, the CFU legal consultant attended a training session at ART farm and also assisted in the training of workforce and management on the Collective Bargaining Agreements and the code of conduct.

4. **Enquiries and legal advice: [Advisory Role]:** The enquiries from the members were continuously trickling in through telephoning, messaging, emails and visits by the members. All inquired cases were dealt with, all the members being advised accordingly and satisfactorily in accordance with the provisions of labour law.

5. **Non-compliance:** It has been noted with concern that some of farmers are non-complying with labour related regulations. Issues of non-compliance with the Collective Bargaining Agreement in the following areas; *Wages and allowances; Hours of work; Payment of wages during holidays; Accommodations allowances for non-accommodated employees; NSSA Deductions; Failure to follow the prescribed procedures on employee dismissal and terminations; Exemptions on minimum wages across all sectors; Illegal collective job action by the employees and workers committees and management of fixed term contracts.*

6. **Illegal Collective Job Action: Strikes:** It has been an unfortunate year for the farmers as the wave of illegal strikes hit the commercial farmers and has seriously impacted on affected the farms.

Recommendations:

- Intensification of Labour trainings and workshops.
- Membership recruitment exercise
- Intensification of Labour inspections by Commercial Farmers Union.

Conclusion: Conclusively, the Legal affairs have been and are still involved in membership and non-membership servicing on labour related issues in the agricultural sector. The path in doing the mandate is not that smooth as myriad of challenges are encountered in the process, however with challenges faced the organization is doing its best to make sure the industry is well catered for.

Luxmore Nhutsve
Labour Consultant



7. IN MEMORIUM

The Commercial Farmers' Union remembers those members that have passed away during the last year and extends its heartfelt condolences to their next of kin.

Psalms 116:15

Precious in the sight of the LORD [is] the death of his saints.

8. 2019 CONGRESS SPONSORSHIP

The Commercial Farmers' Union would like to extend its sincere appreciation towards all those who have contributed in cash or in kind to the Union's Annual Congress for 2019. Without the generous support of these organisations, institutions, individuals and staff it would not be possible for the Union to host such an event.

Please accept our heartfelt appreciation.

MR ANDREW PASCOE

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