



Commercial Farmers’ Union of Zimbabwe Annual Congress 2020

77TH ANNUAL CONGRESS

VENUE: VIRTUAL & SABRE BUSINESS CENTRE, ENTERPRISE ROAD, HARARE

THEME: THE PAST, THE PRESENT, THE FUTURE

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1. Agenda

COMMERCIAL FARMERS' UNION OF ZIMBABWE 77TH ANNUAL CONGRESS

VIRTUAL CONGRESS, 10TH NOVEMBER 2020

9.30 - 9.45	Welcome and opening prayer Rev Kenneth Matata Gen Sec Zimbabwe Council of Churches
9.45 -10.00	Highlights of Annual tabled reports
10.10 -10.15	Appointment of Legal Advisers and Confirmation of Trustees
10.15-10.30	CFU Financial Accounts year ending 31st March 2020 and Appointment of Auditors
10.30-10.45	Resolutions 2019 resume and Membership and Licence fee 2020
10.45-11.00	Compensation Update, Chairman Compensation Steering Committee Charles Taffs
10.45-11.00	2020 Report CFU President , Andrew Pascoe
11.00-11.15	Ministry of LAWC&RR Representative
11.15-12.00	Guest Speaker, President World Farmers' Organisation, Dr Theo de Jager (to be confirmed)
12.00-12.30	Presentation of CFU Farming Oscar and Honorary certificates
	CLOSURE and VOTE OF THANKS



2. Rules of Debate

Order of Debate

- The Proposer will identify him/herself clearly.
- The Proposer will speak.
- The Secunder 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

CFU

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

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- Date A Pascoe, 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

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	1991 Dr S Hargreaves
1962 A Rattray, OBE	1992 R Ternouth
1963 E R Campbell, CBE	1993 Dr P Grant
1964 R Stockil, KBE, OBE	1994 R Winkfield
1965 A C Black	1995 D Smith
1966 Dr I McDonald	1996 M Edwards
1967 Dr H Pereira	1997 H Smith
1968 J R Southall	1998 V Hurley
1969 W Margolis	1999 N Swanepoel
1970 H R Mundy	2000 P Lombard
1971 The Hon J C Graylin, ICDCMG	2001 Dr L T V Cousins
1972 C G Tracey	2002 R Tattersfield
1973 Dr R C Elliott	2003 Dr J Jackson
1974 M E Butler	2004 D Hasluck
1975 N Spoel	2005 Dr J Grant
1976 R A Griffith, ICD, MBE	2006 D S Taylor- Freeme
1977 J R Humphreys	2007 A Masterson
1978 D K Worthington	2008 D Drury
1979 C J Strong	2009 R H Vaughan-Evans
1980 Max Rosenfels	2010 Mike Campbell & Ambassador Xavier
1981 D R Norman	2011 B Oldrieve
1982 J W Field	2012 Dr C Foggen
1983 J M Sinclair Marchel	2013 L R Bruce
1984 J W Hayward	2014 C J Taffs
1985 H J Quinton	2015 Dr D Bruce
1986 John & Jill Laurie	2016 Dr J MacRobert
1987 Dr R W Mupawose	2017 Mike Clark
1988 J Brown	2018 Pete Steyl
1989 R K Harvey	2019 Nick Brooke
1990 P Millar	2020 Ben Purcell Gilpin



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 2020/21 year commencing 1 October, 2020 to become due and payable.

Council further resolves and recommends to Congress the adoption of a payment commencing 01 October 2020 and ending 30th September, 2021 applicable to all members as illustrated in the following schedule:

CLASSIFICATION OF MEMBER	FEE PAYABLE
LARGE OPERATING LICENSE	US\$2000 per annum or US\$200 per month
MEDIUM OPERATING LICENSE	US\$1000 per annum or US\$100 per month
STANDARD OPERATING LICENSE	US\$500 per annum or US\$50 per month
ARAC SINGLE TITLE LICENSE	US\$100
ARAC MULTIPLE TITLE LICENSE	US\$200
CORPORATE (BUSINESS) MEMBERS	US\$2000 per annum or US\$200 per month
ASSOCIATE MEMBERS	US\$500 per annum

NB: RTGS rates will be available from the office on enquiry

NOTES

- Large operating license turnover greater than US\$ 1million
- Medium operating license turnover between US\$500 000 and US\$1million
- Standard operating license turnover up to US\$500 000
- Multiple site operators to be treated according to size of each operation



6. PRESIDENT'S SPEECH TO CONGRESS

The Minister of Lands, Agriculture, Water, Climate and Rural Resettlement, Honourable Dr. Anxious Masuka – represented today by the Deputy Minister, Honourable Douglas Karoro, Dr. Theo de Jager, President of the World Farmers' Organisation, joining us via zoom, Maj. Gen. Chanakira (Rtd) Chairman of the Technical Committee of the JRMC, members of the Diplomatic Community also joining us via zoom, invited guests, past presidents, trustees, councillors, farmers and friends both here present and those joining us on the zoom platform. It is an honour and a privilege for me to welcome you all to the 77th Annual Congress of the Commercial Farmers' Union of Zimbabwe, and I would like to thank each one of you for making time in your busy schedules to be a part of our proceedings today. As the year 2020 has been unlike anything any of us has ever experienced before, so to this Congress is a Congress like none we have ever had before. The Covid 19 Pandemic which has ravaged the world since February 2020 has forever changed the way most of do life and highlighted the fact that we can live quite well without much of what we thought we had to have in order to survive.

The theme of this year's congress is The Past, The Present and The Future. I would like to start by reflecting a little on the past. As an organization we are in our 78th Year of existence and have been an integral part of Commercial Agriculture since those early days. As the Commercial Agricultural sector grew so too did the importance and the role of the CFU and so too did the Zimbabwean Agriculture Sector as a whole until in the 90's we became known as the Bread Basket of Southern Africa as we experienced our heyday.

Unfortunately for us and for the nation as a whole, the unresolved conflict over land boiled over and in 2001 gave birth to the Fast Track Land Reform Programme which not only saw a number of our members losing their lives, but also resulted in the vast majority losing all that they had invested their whole lives into. Some, like myself were permitted to remain on our farms which have over the last almost 20 years been subjected to numerous down-sizing exercises and in many cases we now operate on pieces of land which are sub economic in size. We have however done our best to continue our operations in the most difficult and trying of circumstances, living with the continual fear that at any time and without warning someone could arrive and tell us that they are now the owners of the farm. Whilst the few of us on the land have struggled on, most of our counterparts who had no option but to move into town or leave the country have also over the same period struggled to survive as the ravages of inflation caused whatever savings they may have had to become worthless and advanced age or poor health made them unemployable whilst they waited for the Compensation that the Government of Zimbabwe is Constitutionally obligated to pay. Sadly, for many the wait has been just too long and they are no longer with us.

It was in the midst of the situation which I have just described that some far sighted individuals realised that the day would eventually come when things would change in Zimbabwe and so they led by John Laurie set about working together to put in place the things that would be needed to ensure that a credible compensation process would be able to be undertaken when the opportunity presented itself.

I would now like to turn to the present. The momentous events that took place at the end of 2017 which saw His Excellency E.D. Mnangagwa become the President of Zimbabwe presented the opportunity that John Laurie and his team had been preparing for, and encouraged by His Excellency's President Mnangagwa's commitment to settle the long outstanding issue of



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Compensation and his policy of re-engagement with the West, the Compensation Steering Committee redoubled their efforts to work with the Government and find a way forward. It was largely due to the efforts of this team that the signing of the Global Compensation Deed on 29 July 2020 became a reality. Whilst the signing of the agreement itself was a milestone, the process that led to its signing and the ongoing process that is vital to ensure that it ultimately successfully delivers the compensation as laid out, is of far greater importance. Since the start of the FTLRP, Zimbabwe has been characterised by division and polarisation with the Government and the farmers, viewing each other with at best great suspicion and at worst as mortal enemies.

The current ongoing process has radically changed this and is taking place in an atmosphere of inclusivity and mutual respect, with a genuine desire on all sides to work together for the benefit of Zimbabwe. It is the inclusive nature of the process, the recognition that all of us are Zimbabweans no matter what our background, class or skin colour, that we all have a role to play and that we all need each other which give me hope for the future. There is a verse in the Bible which says that a house divided cannot stand, and there is another which says where there is unity The Lord Commands His blessing. If ever we needed the blessing of the Lord on Zimbabwe it is now.

Continuing on with the present, those who attended last year's Congress may remember that the former Minister of Lands, Agriculture, Water and Rural Resettlement, the late Air Chief Marshall (Rtd) Perence Shiri in his address to us committed to the issuing of tenure documents to all former farm owners who were still farming on their original farms or portions thereof. Following last year's Congress, meetings were held to try and speed up this process, but very little progress was made, until the signing of the Global Compensation Deed and the subsequent issuing of a joint statement by the minister of Finance and Economic Development, Dr. Mthuli Ncube and the Minister of Lands, Agriculture, Water and Rural Resettlement, Dr. Anxious Masuka on 31 August. Since then, there has been a dramatic increase in activity in this regard. Yesterday, 83 Applications for Offer Letters from former farm owners who are still farming on their original farms or portions thereof without any tenure documents were submitted to the Minister of Lands and in a meeting also held yesterday there was a commitment to ensure that the Offer Letters will be issued expeditiously. My hope is that this would be the first of numerous measures that will be put in place to restore confidence that the commercial agricultural sector is a safe place to invest.

Similarly, there is a strong commitment on behalf of the Government of Zimbabwe to speedily deal with the re-instatement of Title Deeds for those BIPPA protected farmers who qualify. This is something that will go a long way towards reassuring foreign investors that Zimbabwe respects property rights and is a safe place to invest. A further current positive development is the timely payment of the second Interim Relief Payment which under the terms of Global Compensation Agreement is payable to those who wish to receive it. This is a dramatic improvement on the IR1 process.

Turning now to the future: I personally and the Commercial Farmers Union as an organisation are committed to seeing the Compensation Process through to finality, not only because we owe it to those whose resources built the organisation but now are no longer able to farm, but also because it is only the payment of compensation that will bring an end to the conflict surrounding the land and enable the full recovery of the commercial agricultural sector. Having said this, however, our core business has always been providing services to active farmers, something we have managed to continue over the last 20 years alongside our work on behalf of those waiting for compensation.



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Whilst the Compensation Process that we have embarked on is still in its early stages, progress is being made and it is starting to gather momentum. It is my earnest prayer and hope that it will be successful beyond expectation and that it will in the not too distant future bring closure to what has been an extremely painful and difficult period of our history and at the same time lay the foundations on which a thriving and highly productive agricultural sector can be rebuilt. As compensation becomes a reality, we as an organisation will be able to return to focusing exclusively on our core business. In order to position ourselves correctly and ensure that we are prepared for the future, we have with the assistance of an independent consultant begun the process of developing a strategic plan. Historically, despite having a diverse membership, the CFU has been viewed as a “white” organisation and our goal is to ensure that we are able to make the transition into an organisation with a broad based multi-racial membership and which is able to provide the services all its members require, thus becoming the Union of choice for commercial farmers.

As I said earlier, the last 20 years have been difficult, challenging and tiring for all of us and there comes a time in all of our lives when we need make some changes and let go of some things and move on to others. Today is for our director Ben Purcell-Gilpin what will most likely be his last Annual Congress as a member of staff. After 10 years of exemplary and sacrificial service he has decided that his time at the CFU is coming to an end. Ben has in my estimation been the finest director that the CFU has ever had. I will greatly miss his great wisdom and insights and his ability to handle an unbelievable work load without ever complaining. Finding someone to fill Ben’s shoes will be a tall order. We will all greatly miss him.

As I begin to draw to a close, I would like to say that after serving two years as the President of the CFU, I am becoming more convinced than ever that our creator, Almighty God is working today in the affairs of men and that he uses people to accomplish His plans and purposes and that we all have a part to play. In The Lord’s Prayer, which I pray almost on a daily basis, there is a line which says “Your Kingdom Come, Your will be done here on earth as it is in Heaven”. I along with many other Zimbabweans pray this every day and I am looking forward to the day when our prayers are answered and the way we do things in Zimbabwe looks like Heaven. If I didn’t believe that there is hope for us and that God has not forsaken us, I certainly would not have the motivation to keep going.

Finally, I would like to thank our many friends who encourage and support us. Without your support we would not still be going. I would like to thank our small but dedicated CFU Staff team who have and continue to work so diligently through the extremely difficult times we are going through. Thank you also to the CFU Council for your support over the last year and I look forward to a year of growth. Thank you also to the Compensation Steering Committee and in particular the retired Chairman John Laurie, the current Chairman Charles Taffs and all the members for their tireless and mostly thankless efforts on behalf of all of us who are waiting for our compensation.

To my wonderful wife Louise and my family, thank you for supporting and encouraging me to keep going along this journey, and last but not least, Thank you to my Lord and Saviour Jesus Christ for your overwhelming goodness to me. I am truly blessed to be living in Zimbabwe at this time in our history and I am looking forward to seeing you work miracles that will astound us all.



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My prayer is that the 2020-21 farming season will bring the abundant rains and the bountiful harvests that we all so badly need. May God bless you all.

Andrew Pascoe, CFU President

7. CONGRESS REPORTS

REGIONAL REPORTS – 2020

MASHONALAND CENTRAL 2020

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, with most areas receiving half or less of their annual average rainfall. The drought has had a dire impact on dry land row cropping resulting in yields plummeting. With little to no run off from the catchment areas dams received zero inflow, resulting in levels becoming critically low and in some cases drying totally. Thus affecting production in many irrigated farming areas as well. It only goes to show how important the development and investment into water security, irrigation and other high tech methods of production are.

Due to Government's decision to control the price of maize by issuing SI 145 of 2019, in the previous season and with uncertainty for the current maize pricing structure, many farmers reduced their maize plantings and instead pushed their soya hectares. The local soya pricing is much closer tied to import parity, thus making it a more secure option. This reinforces the facts that price controls only lead to produce shortages, and the best way forward is a free market with willing buyers and willing sellers. 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 one positive area, for those who are fortunate enough to have had access to limited storage water still available in dams. The relatively stable electricity supply, mainly due to very large volumes of water inflows into Kariba Dam, has resulted in ZESA having very little load shedding during the growing season. This in combination with a realistic producer price of ZWL\$52,534/ton for premium grade wheat has seen a large increase in winter cereal plantings. Command inputs for the winter wheat have generally been easier to obtain now that it is administered through CBZ bank. Shortages of inputs and delays in supply however have



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caused major problems for timely operations, for those farmers relying solely on Command inputs and not able to fill the gaps. Many farmers received their inputs so late that they have had to store the fertilizers for use in the next summer season. Shortages of diesel at the start of the winter production have compounded problems. Faults in the dilapidated and poorly maintained electricity distribution grid, together with the ever increasing vandalism and theft of ZESA infrastructure is one of the major limitations to growth and development in Zimbabwe, not only in agriculture but in all areas of comers, 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 expensive 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

Chairperson, Mashonaland Central

MASHONALAND WEST (NORTH) REPORT

Overview

The 2019/20 season was characterised by fluctuations that seemed to be at work at all facets of production on the farms. The district started with a long dry spell just after the normal planting time so those who had finished planting were severely affected and those who planted late had a modicum of success with their crop with the later rains.

The commitment from the Government to pay compensation has been welcomed by most farmers in the district. We now look to Government providing interested farmers with offer letters and 99-year leases so that farmers can produce food with security of tenure and the confidence to farm and invest. It needs to be understood that farming is a long-term business and needs years of planning and investment for the farm to be successful and productive.



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The demands being made on those leasing land from offer letter holders are becoming totally unreasonable and is causing a lot of uncertainty for the future of farming. This makes long term commitments almost impossible thus jeopardising food security for the country.

Marketing and delivery of crops appeared smooth with better prices being offered by the GMB particularly for wheat. The dams are generally low which affected irrigation for the winter crops being grown. A small irrigated tobacco crop has been planted due to shortage of water in the dams.

Command farming had a positive impact on farmers for the 2019/2020 season with a large amount of those farming taking advantage of the inputs being made available. We are yet to see what inputs will be made available for the 2020/2021 season as up to now there does not appear to be any available. This is worrying as those still farming should have already made their preparations for the season to come.

Crops

Generally, there has been mixed feelings shown for the past season with some particularly good, irrigated yields of tobacco and row crops reported. Dry land was average and as always the timing of the onset of the rains being a critical aspect. Winter crops are down in hectares with farmers choosing not to move their irrigated land into wheat production as the dams are so low.

Cattle

The commercial herd is down significantly in numbers and there is a perennial challenge with running a herd due to fences being stolen, keeping grazing intact and fires under control. There are however a few cattle producers left in the district that are committed to keeping their herds running and there are also the pedigree herds that are so important to our future in beef production.

Other

Unfortunately there remains to be very little production of chicken, pigs, sheep and goats. Although there is good potential for growth in these sectors this is being held back by the fact that investment is needed to boost them, and the finance is not readily available.

Security

Sadly the theft of maize from the land this year was extremely serious and uncontrollable with little help from the authorities.

General

In conclusion, 2019/20 has been a difficult season, with the farmers out there continuing production under less than ideal circumstances. There are large areas of unutilised and underutilised irrigated land that has the potential to produce this country hundreds of thousands of tons more food and exportable crops. Mash West like the rest of the country should be looking at production as our primary goal and set aside the counterproductive rhetoric and policies that are hindering the progress of agricultural production in Zimbabwe. To the farmers in Mash West and the rest of the country, well done for the production and commitment to the past season and let's hope that 2020/21 is peaceful, productive and the good rains predicted materialise for all of us, whether Commercial, A2 or A1 farmers.



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Roy Linfield

Chairman Mash West (North)

MIDLANDS REPORT

We have once again experienced a very difficult year with a number of major factors coming into play this year that have challenged us and forced us to put our heads down and work very hard to stay in business in a completely new working environment.

The newest challenge we faced this year came on very rapidly from February of this year and by the end of March we saw a complete lock down of our country due to what is now the infamous COVID 19 virus. This virus has threatened our way of life as a very infectious disease that; if not handled properly threatened the lives of many of our community and citizens of our country. The lock down slowed the spread of the virus and allowed our health system to cope with those that fell ill from the virus. For business it was a huge challenge as we saw our markets closed down and our customers unable to access our products. Our way of life changed dramatically as we were no longer able to get together in even small groups. Schools were closed and our children had to learn to cope with internet classes and being away from their friends and sporting activities. We have had to get used to face masks, temperature checks, sanitising our hands constantly and social distancing (not easy to stop handshakes, hugs and kisses.) Our elderly have been the most restricted as the disease threatened them and those with added complications the most. Five months on the nation is slowly opening up and we are starting to regain some freedoms with new rules on how we protect ourselves and interact with each other. We mourn the loss of those who have succumbed to the disease but do feel that the protective actions taken by our Government have protected the lives of many in Zimbabwe thank the Government for their decisive action.

The year also saw the nation face one of the worst droughts in decades which, following a poor 2019 rain season, has seen dam levels dwindle to nearly zero and irrigated cropping face a bleak future in 2021. Dryland crops failed almost completely with areas receiving as little as 200mm for the season. The 2020 dry season has been long and grazing for animals is extremely short with a number of months to go before we can see relief. It is going to be a costly season to the livestock industry. All sectors of the livestock industry are relying on imported raw materials and this adds to the cost of basic products. For a population already facing lower incomes and complete job losses due to the effects of COVID 19 the future looks very difficult.

The financial sector has also seen a difficult year as we saw major changes in the market. The year started with a complex situation where the country had multiple exchange rates while currency speculation drove the rate of inflation to peak levels around May/June of 800%. The introduction of the foreign currency auction system in early August of 2020 saw an immediate jump of the official market to around 45 to 1 and this has steadily increased to levels around 83 : 1 in late August. The positive effect of this has been to stall the parallel market and has allowed industry to access legal foreign currency for its import needs. This has been effective in stabilising prices to date. Some input costs such as wages had been very badly affected by this hyperinflation and are still trying to reach effective levels. We hope to see the auction system stay effective and be able to support all industry sectors leading to price stability and an opportunity for business to return to profitable levels.



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Compensation for farm improvements has been a major news item in the last few months with the Compensation Steering Committee working extremely hard to finally reach an agreement with Government at the end of July 2020. There is still a lot of work to be done but the work done by the CSC has provided hope that the issue is heading to a point where farmers, who accept the deal, can see some return for farm improvements. Hopefully the country can move forward to a point where land can be valued and agriculture can access finance to stimulate production sooner rather than later. To this end we would like to thank the members of the CSC and ARAC for all their hard work and the time they have put into this matter.

The dairy industry has struggled since last year's drought and then more so in this year's difficult economic environment. A shortage of disposable income has seen the whole value chain struggle to survive. Recent competition between processors has had a positive effect on the raw milk prices giving producers some respite. We look forward to a better 2021.

Water levels in the region are generally very low but the hope is that the winter crops that were put in will be seen through. Earlier crops are looking good but later planted Command crops are questionable both on yield results and the ability to finish before water runs out.

Labour have been struggling in the economic environment of this year and farmers have had to support their staff with supplementary food packs. The inability to pay cash has seen the rural communities struggling to spend their wage from cards, especially once Ecocash was closed. This has further demoralised the work force and the attraction of easier money in mining threatens the loss of labour for the coming agricultural season.

The poultry industry has seen shrinkage in production this last year but is still struggling with viability as prices in the market remain poor leaving producers in financial problems going forward. A shortage of local raw materials are also seeing producers struggling to get enough inputs to produce and get products to the market.

The beef industry is being severely impacted by last year's drought. Grazing is very short and animals are dropping in condition rapidly as we enter the summer season. The beef price did struggle to keep up in the hyperinflation period but has regained some of its lost ground recently.

I want to thank the CFU team for the extraordinary work they have managed to get through this last year. Andy Pascoe has led the CFU extremely well and for that we thank him. Ben Purcell Gilpin has been a rock we have all leaned on and no words can truly express our gratitude. Mike Clark and Louise are quiet in the back ground but we could not see CFU managing without them. Thank you both. To the rest of the office staff we thank you all for you hard work.

May God bless you all in 2020 with good rains and an environment for peace and prosperity for everyone.

Kevin Franceys
Chairperson, Midlands

MASVINGO REPORT



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Whether farming or not, this year was certainly a completely different situation we have all faced, especially with this Covid-19 pandemic literally turning the whole world's economies completely upside down. Our whole way of life had to be completely changed as we all adapted to the various new rules and regulations that were implemented to curb this terrible disease. In fact Sue and I spent a couple of months working from Glenlivet during the lockdown.

Fortunately Agriculture was classified as an Essential Service early in the lockdown so it was exempted from most of the rules of the National Lockdown and were allowed to continue to operate almost as normal. However, travelling required satisfying the individuals at the many roadblocks, which have been mounted throughout the lockdown. But being farmers we found a way to move through them with ease. Probably the only good side of the lockdown was the assurances given by the Minister, which gave us almost continuous ZESA power.

The international lockdown certainly put paid to what was probably the most successfully booked hunting season for very many years. Without the lockdowns our hunting fraternity would have experienced one of their greatest safari seasons, which they so desperately needed. Fortunately though, once the local lockdowns were lifted slightly, to reopen lodges, their camps were fully booked accommodating local visitors, albeit at a much lower fee.

The rainy season was certainly not conducive for cropping, especially in the marginal areas of our province. There were just too many long periods without rain, with some of the small-scale farmers planting their maize up to four times. Although there was some inflow into the major dams none really filled to more than 45% or so. Since then, the water has been drained out extremely fast to supply water for the sugar and increased winter maize crops.

The constant price increases in all farming inputs, as well as everything else, became a real battle of viability and survival in our industry this year. Unfortunately, the selling price of the commodities they produced, fell far short of catching up with these constant increases, which were all valued against the US\$ rate on the parallel market.

We said last year that "Next year would be better", but it most certainly was not. Maybe next season?

Obituaries

Sadly, this year we lost four wonderful ladies, each of whom had a huge influence in our province and particularly in their respective districts. They each left their own special legacy and will most certainly never be forgotten.

Kate Raath (Harvey) farmed in Gutu/Chatsworth with her father the late Keith Harvey and despite being a dedicated conservationist like her father, she was also a well-known artist. She passed on 25 February 2020.



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Then on 30 March 2020 we sadly lost the most well-known and incredible lady from Mwenezi/Beitbridge **Janet Cawood**. Much has been said about the fantastic team of Sam and Janet who did so much for their district and country. They are now together again but although sadly missed will certainly never be forgotten.

On 28 July 2020 we were all shocked to hear of the sudden passing of **Hester Kotze** who was another wonderful lady from Mwenezi, who also did so much for her community and will be sadly missed.

The legendary **Pat Potgieter** sadly passed away on 8 November 2019 followed by **Shirley Borland** on 26 July 2020 who had cared for him for so many years in his advancing age. Pat was one of the last successful Afrikaaner stud breeders, until he saw the light and changed to Brahman.

Des Mulock Bentley, who spent many years on his Samba Ranch in Chiredzi passed away on 28 January 2020.

Willy Swart was well-known in the beef marketing circles and the now dwindling industry certainly missed his smiling face, excellent advice and jovial antics after he passed away on 22 February 2020.

On 9 March 2020 we heard of the sad passing of another Mwenezi farmer, **Neville King**, who had moved to Bulawayo to continue his active interest in the cattle industry. He was also a large part of our local community and is also sadly missed.

Our most sincere condolences to the families of all the above and may all the loved ones they have lost now rest in eternal peace. Let us take time to think of them, remember them and pray for them and their families left behind.

Weather

Certainly a very strange rainfall pattern this year with very few flash flooding of any of the rivers. In fact the Tugwe Mukosi Dam inflow has certainly been far below its original expectations, especially after the first year when it spilled before the dam was finally sealed. Winter this year was colder than we have previously experienced with even a few days of frost being recorded. There were a few long dry spells in between the rainy periods, which severely damaged crops. However, there was sufficient late rains to assist the grazing in most areas. Initially, although water was available for irrigating the cane crops the unreliability of ZESA power was a huge problem. But then came good soaking rain and then more reliable ZESA came back and has continued.

Livestock

Last year we were getting really excited with the proposed reopening of the Masvingo Cold Storage Company abattoir, although we were concerned about exactly where the slaughter stock and subsequent beef market would come from. Sadly, although some work was undertaken on the renovation of the massive resource that has remained idle for far too long and deteriorated, the whole contract was abandoned a few months ago.



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Although most of the large breeding herds no longer exist in our province, Nuanetsi Ranch and Triangle limited seem to have the largest numbers, with a few smaller commercial operators still managing to keep going albeit on leased land.

Thankfully, we still have two excellent pedigree breeders who are keeping the superior bloodlines intact, which are most suitable for our province. Although the National Bull Sale was a success, despite all the restrictions our breeders sold more on private sales. One such sale saw 34 high quality bulls going back to the Lowveld. Dirk Odendaal keeps a keen eye on the quality of the national Brahman herds as he continues his appointment as the Brahman Breeders Society's President. Dr Japie Jackson continues his evaluation of health and standards of most bulls put up for sale both in his home province as well as all around the country.

Most of those involved in the industry in our province are speculative buyers and sellers as only relative small properties, or portions of properties, are available for lease. In order to breed and manage cattle properly, fenced off paddocks with controlled grazing practices need to be well managed, which simply cannot be achieved under the current land reform, which lacks any form of security of tenure or property rights. Recently a farmer fenced off a leased 400ha piece of land only to find the 2.4km fence stolen in its entirety a few weeks later.

Unfortunately the demand for meat has fallen with the price increases and the reduced spending power of the public, which is decreasing with the loss of jobs through the economic downturn caused by inflation and Covid-19 pandemic. The price that cattle farmers are receiving for their cattle is very low in real terms so very difficult to survive without value addition.

Livestock, and particularly beef cattle were the lifeblood of our provinces economy. We do have one dairy farmer still hanging in there but we definitely need many more. With the new impetus to redevelop agriculture in Zimbabwe we certainly hope that our provinces beef and livestock industry could recover to its past glory.

Helen Mitchell is still doing an amazing job of supplying day-old-chicks to the markets throughout our province. But she too was initially affected by the market downturn caused by the Covid-19 pandemic. Slowly, this poultry market is thankfully coming back to life again. Pig producers have also had a tough year with lower prices due to the glut as well as stock feed price increases.

Wildlife

Save Valley Conservancy

(Stephen Vos)

Habitat and wildlife management and the impact of Covid

Like most tourist areas Savé was and remains severely impacted. Cancelled bookings led to retrenchments to an extent, short time and overall budget cut backs. The Special Species Protection



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Unit (SSPU) which is responsible for rhino, pangolin and other endangered species anti-poaching had the budget cut back to essentials. My priority was to keep the brave APU folks compensated without cut backs to ensure morale and service is maintained under trying conditions. With help from donors and individuals salaries for SSPU will remain intact until year end at least. A number of Covid rapid relief grants have been applied for, these offers are heavily oversubscribed to it remains to be seen if any are successful.

There has been an increase in local tourism as a result but that market is limited. There have not been any reported cases of Covid in and around the Conservancy to my knowledge to date. Measures were put in place early as a safeguard. Through SOAZ proposals are underway to address the issue of allowing foreign tourists to enter Zimbabwe.

Poaching

To date in 2020 4 dead rhino have been found, old carcasses mostly, some buried, and investigations are under way with MFFU, ZimParks and ZRP. Two contacts occurred earlier this year with rhino horn poaching gangs with the SSPU achieving success against the poachers. Meat poaching has rapidly increased. This has been attributed to lock down where static human populations look towards sustenance by way of poaching. This includes timber poaching. The SSPU ranger density remains low relatively speaking at 1:64 square km. The intention is to boost numbers over time through various means and strategies. A relief program for ranch scouts is also underway to assist distressed properties.

Weather

Seasonal rainfall averages continue around the 500mm mark. It is interesting to note that during Idai over half the rain measured was due to Idai in that short period of time. The storm travelled south along the eastern boundary of the Conservancy. No fatalities occurred and there was some bridge and road damage. Graze and browse remains good, some areas will conduct limited back burning to maintain grazing.

Community

Most members continue with in house community work on a limited scale due to Covid. On a Conservancy wide scale AWCF continues with a robust program, SVC has partnered with TUSK to roll out the PACE education program to surrounding schools, the target being 96 schools at least, however Covid has impacted the scope and timing of that project. Its early too report now but there is significant funding due to be signed up for more community work. A USD\$20 000 upgrade of the Gudo Community clinic has been completed and is due for official opening soon, thanks to a donation from a family foundation in the USA enabled by our Chairperson Mr W Schenck, a most generous donation.

Projects

Four elephant bulls remain under collar, as well as 14 giraffe. A planned elephant translocation was due to take place in 2020, Covid stopped that, so a new strategy is being worked on. The Conservancy is heavily over populated by elephant. Carrying capacity is set at 900 to 1000, by year



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end the population will be around 3 000. The bush, trees etc are be significantly impacted. So the case to move elephant through philanthropic funding is urgent and important. This will include a parcel of plains game and predators.

Longer term communications with the EU remain over the roll out of funding for the SVC South (Chiredzi North). This year a feasibility study, underwritten by the EU, was supposed to have been completed by August, again Covid impacted that work, but the bureaucracy is moving again. This project will address issues raised by and agreed to in principle by the SVC and communities, as agreed by the signing of a Public Private Community Partnership signed in August 2019. Time is of the essence as encroachment, HWC and PAC issues remain. Due to the multi stakeholder nature of wildlife and community work, time sometimes seems to stand still, tangible progress is often slow. The wheels are moving though. The aim to connect with GLTFCA remains with a view to social upliftment of the Lowveld region and ensuring that there is a safe place for our precious flora and fauna to thrive. Overall I am confident of the future of Savé. H.E. the President dwelled on the importance of the 3 large conservancies in Zimbabwe as being part of the future success of Zimbabwe during his speech at the Wildlife Economy Summit held in Vic Falls in 2019.

Sugarcane Industry

(Stephen Schwarer)

The sugar production for the year is estimated at between 445,000 and 455,000 tons sugar. Production to date is 235,000 tons sugar from just over 2 million tons cane (54% of estimate final) Both mills are expected to shut down at the end of November. Covid 19 has obviously brought with it complications in operations, which have been minimised due to strict adherence policies including testing of drivers and operational staff.

Water remains an issue at this time, the industry is on 85% of normal allocation. The Manjirenji-Siya system has sufficient waters to February 2021, while the Mutirikwi – Tugwe system has waters for the next 13 months. Protracted negotiations with ZINWA regarding a catchment specific price have seen ZINWA simply issue invoices at their predetermined rate which has not been industry approved. They are also trying to delink the price of water to the volume by changing the historical formulas. It appears that the sugar industry will accept a US Dollar based price multiplied by the auction system rate per M/l allocated.

The supply of inputs such as fertiliser has been adequate and the crop for harvest in 2021 looks promising. Labour has seen consistent increases in wages, which are now sector specific as reported in your newsletter.

NRZ is struggling to maintain its fleet of loco's for the industry which is affecting mainly bundled cane from Mkwazine and some exports and it is hoped that the maintenance program will be intensified to ensure rolling stock availability at all times.

Access to Land



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With the majority of us unable to farm any more in our home country, Zimbabwe, since we lost our farms during the FTLRP many of our young farmers have left the country to follow their dreams elsewhere, which is a great loss. One such young man from Mwenezi is now farming in South Africa and we congratulate Henna du Plessis for his well-deserved award of Young Farmer of the Year 2019 in South Africa. It also amazes me just how many of our progeny from our province are now practicing veterinarians, albeit all of them scattered around the globe.

We have all been through a very difficult period over the last 20 years since we lost our homes and investments, but at last we do see hope since the signing of the Global Compensation Deed (GCD) on 29 July 2020. There has been a complete change on the administration side of agriculture and are encouraged by the continuing good work of the newly appointed Joint Resource Mobilisation Committee (JRMCM). They are tasked with seeking finance for the compensation of improvements and land as well as getting agriculture back on track to its former glory and maximum productivity.

The Interim Relief (IR1) payments to our members, which should have been completed by 31 May 2019 has still not been completed and has been a bureaucratic nightmare. We certainly hope IR2 will be easier and much more efficient. We all need to sincerely thank **Wendy de la Fargue** for her massive efforts in keeping the wheels turning in her constant push for the payments.

Although we were encouraged with the gazetting of Statutory Instrument 62 of 2020 early in the year, which apparently gave access to land and return of title to farmers covered by respective Bilateral Investment Protection and Promotion Agreement (BIPPAs) and indigenous owners, we still await clarification on whether our Mauritian and South African farmers fall into this category. Of course the word "indigenous" remains very contentious.

We can only hope that with the new initiative that secure land with property rights will be made available to all Zimbabweans for long term, meaningful investments.

Masvingo Region and CFU

Once again we have been keeping in contact with all the farmers in Masvingo Province via the very useful WhatsApp platform and I sincerely thank you all for your contributions. Being a farming group I am pleased to say that we have generally managed to stay out of politics completely sticking more to farming and topical issues.

One day a week up here in Harare for me is devoted to the production of the CFU Calling, which for those who do read it, would have been kept fully informed on what your CFU team in Harare has been doing. It has been an extremely busy and very exciting year indeed under **President Andy Pascoe** and **Director Ben Gilpin** who both have been an absolute pleasure working with. I have had absolute admiration and huge respect for them both.

Thank you for electing **Rob Beverley** as my Vice-Chairman again as he is always a fund of very wise information and out of the box thinking and who keeps me on my toes. With us just being on Council



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is a constant reminder of the different compensation requirements for cattle and wildlife ranchers in the Lowveld, whose main investment is in land, and development thereof. Although we have held no meetings in the province we certainly appreciate all the emails, phone calls and personal visits to the office to keep us updated with your needs etc.

Our Compensation Steering Committee (CSC) has done an amazing job this year and it has been very impressive watching them in action in the few meetings I have attended with them. Theirs has been a long and difficult task, which was headed by **John Laurie** for 17 years before he stood down as Chairman. His clear thinking and incredible diplomacy managed to steer us on the right path, which is now followed by **Charlie Taffs** and his team. Since the signing of the GCD most of that team have been absorbed into the Joint Resource Mobilisation Committee (JRMCM), which now has the huge task of raising the money as well as working on a development strategy to get agriculture back on track. Experts in different fields are always called in to attend these meetings too. Everybody in the team is worthy of a massive thank you as it has not been easy and they have all done it without any financial reward.

Patrick Ashton is another solid member of the CSC team, as well as heading ARAC and also being part of the incredible Farm Families Trust (FFT), headed by **Barry Munro**, who do their best looking after the medical requirements of the needy.

Once again to mention Andy Pascoe who has spent so much time working towards the GCD and now on the JRMCM, as well as running our Union, I often wonder just how he finds any time to keep running his own farming operation. 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 sincerely thank his wife Louise and their family for their consideration of putting up with the disturbances to their family life, which are caused by his solid commitment.

We can only pray for a better year next year and that we can all move forward together as farmers and a stronger united nation.

Keep strong and united.

God bless you all.

Mike Clark

Chairman, Masvingo Region

MATABELELAND REPORT

Matabeleland has suffered from three years of drought, with the South being hit worst. Most dams are reporting near empty or empty. The Capital of Matabeleland, Bulawayo's dams are reporting dry or almost dry, resulting in huge water cuts (ie one week on one week off). Huge queues form in the western suburbs as residents wait to fill buckets at boreholes. Health issues are also a concern as



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water has not been tested, companies are also having to cut back or temporarily close due to water shortages.

Large losses have been reported around the provinces on livestock, mainly in the south, as cows with calves at foot or in calf cows are unable to sustain themselves. The price of stockfeed makes it unaffordable to most producers and roughage ie grass was approximately 50% down on cutting compared to last year due to lack of growth.

No assistance has been given to communal producers by NGO's compared to previous seasons. In the resettlement and communal areas many plot holders are abandoning plots and returning to their rural homes. Most Zimbabweans in the Northern and Southern provinces are either working in South Africa or gold panning to survive.

Market produce producers are complaining of low prices at markets as the buying power of the man in the street is not there and most struggle to make ends meet. Most workers on farms are refusing to work unless they are paid in Rands or US\$, this has created huge problems for farmers as they are unable to access foreign currency. This has resulted in worker moral being at an all-time low.

General – People are despondent as they see no light at the end of a long dark tunnel and corruption is out of control.

Mac Crawford

Chairperson, Matabeleland

COMMODITY ASSOCIATION REPORTS– 2020

CROP PRODUCERS ASSOCIATION REPORT

Commodities are dominated by the contracting companies, with lesser volumes being marketed outside the contracting system. Of the contracting players, one is dominant, and is in a position to invite growers, with growers competing to get on the books of this particular contractor.

Maize

Maize was in short supply nationally in the first quarter, and by February 2020, imports of maize were allowed. Total planted area including small-scale was almost 1.6 million Ha, with an official harvest of around 907,000 MT.

There appeared to have been little appetite to grow maize as a self-funded crop in a controlled environment (GMB was legislated as the sole buyer of maize by SI 145 of 2019. A ZWL quoted price was not attractive to self-funders, because of fears of rapid local currency depreciation. This had the effect of many farmers growing maize either for contract or sufficient only for own needs, whether on-farm consumption or on-site processing into stock feeds or converting to silage. GMB price at end of February was ZWL 6958, officially said to be equivalent to USD 389 at the time, but in reality, closer to USD 300. GMB price in May was ZWL 12,329.00 per MT, equivalent in late April to about USD 310. By late May, this ZWL amount was worth about USD 200 due to the declining value against the USD. By 21 July, government had announced a maize price of ZWL 16,856 and soon after, a 30% top offered, making the price ZWL 21,000 as of first week of November. Safex price as of early November 2020 is USD 320 -330 per MT.



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Command Agriculture did encourage the planting of maize, with growers attracted by the inputs provided up-front and the prospect that these inputs could be paid for in grain. It took a bit of faith to believe that a pragmatic price offered for the crop at harvest. Supply of inputs has become the key factor in growing of maize, as it has for other crops. Fertilizer is the major cost of the maize budget. Command inputs were seen as a mixed blessing: seed is always from Seed Co without the possibility of using tried and tested varieties from other seed companies. Crop chemicals as supplied by Command are observed to be of variable quality (particularly glyphosate). Fertilizers are possibly the most significant benefit from Command, and diesel the least reliable.

A “One Stop Shop” was set up at Min. of Agric (MLAWCRR) to apply for import permits, but the process, although simplified somewhat, was still complex. It is noted that most of the maize imported in 2020 was probably GMO. The GMO status of imported consignments had to be declared, and “GMO positive” had to be milled under supervision.

Fall Armyworm (FAW) continues to threaten maize production, but the effect of the pest was eclipsed by the poor rains that fell in most areas. FAW compounded any yield losses incurred by drought, as it appears to thrive in drier conditions. Despite that, FAW does seem to be controllable with the insecticides that have been registered for its control, plus unseen natural enemies are starting to adapt to and control the pest. A closed period for 3 months over winter would help control FAW by denying it a means of survival over the cooler months. Winter-grown maize as grown for food security is a risky strategy for season-to-season control of FAW. In a mild winter, FAW would survive better with a potentially large starting population at the beginning of the summer maize season.

In other counties, Bt Maize is used to address FAW control and is used as part of an IPM (Integrated Pest Management) program. Bt Maize is GMO, and government would have to make a policy turnaround to allow GMO varieties to be grown in Zimbabwe. Bt Maize could potentially make a great difference to food security. FAO has applied subtle pressure to allow GMO to be adopted, to the point where DR&SS (part of Min. of Agric., MLAWCRR) plans to conduct strictly controlled field trials on Bt Maize in the 2020-2021 season. This would be a break-through for GMO technology in Zimbabwe.

Small and medium-sized stockfeed companies struggled to secure meaningful volumes of maize from GMB and faced hassles buying maize direct from farmers due to SI 145. It makes sense for smaller stock feed companies to register contracts with farmers to supply maize, but most small companies were not in a position to supply inputs.

Soyabeans

Most soya is contracted. There was not much in the way of uncontracted crop on the market. The total planted area to soya beans was 34,700 Ha according to AMA. Yield projected by Min of Agric is only 43,000 MT, which may be understated. Small and medium stock feed companies struggled to get hold of soyabeans and offered around USD 400 – 420 / tonne to attract the crop, with limited success. Oil expressers offered a similar price. Imports of soya beans and soya cake reached Zimbabwe and kept the market price near import parity.

Cost of stockfeeds was a widespread complaint. Many emerging NGO-backed, small-scale poultry businesses were severely set back by the unaffordability of feeds, of which soya makes up a large part. LMAC in discussion with CFU is seeking to make soya available at a reasonable price. LMAC



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supports the forming clusters (syndicates) of farmers to supply verified off-takers, such as stockfeed companies and oil expressers.

Pests and diseases were not especially problematic. The practice of looking out for and collecting soyabean looper carcasses and storing them in freezers should be revived, as this is an environmentally – friendly, chemical-free way of controlling the pest.

Wheat

A respectable – sized wheat crop was planted in a mostly favourable season. About 15,500 ha was planted by farmers growing for contractors. A further 10,000 Ha at least were planted under Command (at least 6,000 ha) or privately funded, by CFU or other large scale commercial farmers. Command claimed 70,000 ha of wheat were planted, the Wheat Board claimed about half that. That would make about 25,500 Ha by large scale commercial farmers, and another 10,000 ha by medium and small scale-farmers.

Shortage of irrigation water was the biggest constraint. Govt was determined to have a historically large wheat crop and a Command Agric program for wheat was put in place. The fertilizers provided under Command surely motivated many, especially younger farmers to plant wheat. A Food Security rate was set by ZINWA at ZWL 179.67 per megalitre for water which was favourable, bringing welcome relief to the crop budget. Electricity was in most parts reliable, a great improvement on the previous year, and efforts were made to set a reasonable tariff.

SC Nduna suffered badly with leaf rust in places, and the same variety saw an upsurge in Bacterial Leaf Streak. SC Select had better tolerance to both diseases. The Glendale -Bindura areas generally had more disease than other areas. Aphids were generally less of a problem than in previous years, probably correlated with lower temperatures.

The price announced in local currency prices for wheat were fairly attractive. For Standard Grade, Utility 1 and 2 it was \$43,778.84, but Premium Grade paid \$52,534.61. Between Premium and Standard, the main difference is protein content, which must be > 11% to qualify as Premium.

GMB contracted the independent testing agency SIS for falling number and protein testing, and besides Aspindale, testing was available at Chegutu, Concession and Banket. Unexpectedly heavy rains fell in certain areas (especially Kwekwe, Gweru) at time of harvest, causing lowering of falling number and protein content. However, even Utility 2 grade is getting a good price, the same as Standard grade.

Sorghum

The sorghum price tracked slightly higher than maize. The corresponding prices were ZWL 12,865; 16,153 and 21,913. Production for 2019-20 season 103,000 MT.

Sugar Beans

Production was according to Min of Agric 12,660 MT, with a planted area 22,000 Ha, showing a disappointing average yield of 0.57 tonnes / ha. It is figures like these that show that food security requires an industrial approach, and that production comes from well-equipped, determined and experienced farmers.

Tobacco

Projected crop size at start of the season was 218 million kg. The actual crop will be around 183 million kg, which is down on last year's 259 million kg.



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Industrial Hemp – CBD Oil.

Statutory Instrument 218 of 2020 AMA Agriculture Marketing Authority (Industrial Hemp) Regulations was been released.

AMA will be the licencing authority. Farmers would need to apply for a General Cultivator's Permit, at a cost of USD 200, which authorises the cultivation of industrial hemp, its processing and selling. The security regulations for cultivation site are stringent and record keeping requirements are rigorous

Stewart Wilson

CFU, Commodities

HORTICULTURE REPORT

The establishment of the HDC was a necessity for the horticultural industry to streamline the communication channel between industry players and Government. The goal we set out to achieve was to establish an effective and recognised independent body to represent the interest of both the members and the industry at large.

The Deputy Minister of Agriculture appointed the interim board who were mandated with the task above. This was successfully achieved and culminated in our first AGM for HDC which was held in Harare on 21st of August 2020. At this meeting new board members were appointed in line with the constitution and I am pleased to report that there was a great mix of young and more experienced association members who were appointed as the first official board covering trade members, producers, and farmers unions.

During 2020 the HDC strategy was developed with the interim board and finalized by the current board. This is a very powerful document that we anticipate will have buy in from all stakeholders. Many thanks to Palladium (funded by UKAid) for funding the consultant who worked with us to develop the document. This document will be circulated shortly. Palladium also funded the development of our HDC Policies and Procedures and corporate governance manual. Unfortunately Palladium are closing down but I am pleased to report that the Dutch are picking up the slack and have pledged to support the HDC through the next phase.

Great progress has been made and the HDC has officially been recognised as the key apex body of the horticulture industry and has been appointed to assist with the GOZ national horticultural recovery plan. The HDC will be working closely with the Horticulture Working Group under the office of the Vice President. With the lines of communication well established we look forward to growing our membership base and finding solutions to the various challenges facing the industry. We believe that GOZ is committed to make a success of the industry and we must embrace this positive move.

The HDC had to move from the initial premises in Belgravia and we are currently accommodated at Citchem in Bluffhill Business Park. Big thanks to Citchem for this gesture in our time of need!

In closing I would like to appeal to all horticulture farmers to join your relevant associations or just join the HDC as a non-associate member. Linda Nielsen is our very capable CEO and she can be contacted on nielsen@zol.co.zw. Regular updates are available for members.

Liam Philp

Horticulture Representative



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CATTLE PRODUCERS ASSOCIATION REPORT

The rainfall over the country was very uneven, but in general the country experienced another drought, surface water is short and the grass in the veld had very little bulk. Regenerative farming practices using livestock could increase water retention and bulk if practiced. Rampant fires also added to a shortage of our cheapest food source.

For the 3rd year running official slaughtering are down in 2020. Reasons are thought to be lower national herd numbers, poor producer prices and the many selling costs the producer incurs if he sells his animals through the official market. Unofficial marketing and slaughtering are becoming the norm in rural areas.

The Zimbabwe Herd Book is reporting an increase in the number of new registered pedigree breeders especially in the Braham and Boran breeds. The Nguni Society has been resurrected with a total of five new breeders. The Society has decided to revert to its Zimbabwe breed name the Nkone.

The National Bull and Heifer Sale and National Breed Sales have become a National event, not only a sale, where breeders, buyers and friends meet and talk about their cattle and farming in general. COVID 19 placed restrictions on large gatherings of people, and the Zimbabwe Boran Breeders Society made history when they held the first online cattle sale in Zimbabwe. The sale had its teething problems but breeders were satisfied with prices offered. There were 5 overseas registered buyers of which 2 actually bought cattle online. Bull prices were up 25% on the 2019 sale. The National Bull and Heifer Sale only allowed 50 buyers into the live auction. The sale had a Live Stream online format; this was also a first in Zimbabwe. Prices were firm and slightly up on previous years. The firming of pedigree prices indicates the commercial breeders are in the cattle business for the long term and appreciate excellent quality stud animals.

Numbers of the National Herd have not increased and in some areas are decreasing due to drought, fire, stock theft and diseases. These issues need to be addressed if we hope to increase the National Herd. Diseases like Foot and Mouth and Theileriosis can be controlled and managed if we as producers, government and Veterinary Department pull together and work together as Zimbabweans.

In conclusion Ladies and Gentlemen, cattle breeding is a long-term business with high investment costs for low long-term reward. There are many passionate cattle producers in Zimbabwe large and small scale. If we are serious about resuscitating the National Herd, security of tenure will go a long way to instilling confidence in long term and intensive cattle production.

Mark Hook

Cattle Producers Chairperson

AGRICULTURAL RECOVERY AND COMPENSATION (ARAC)

ARAC's initial focus this past year had been primarily on the interim Relief offered by GoZ but secondly, more importantly, supporting and influencing CSC's engagement with GoZ to achieve an agreement. This culminated in the signing of the Global Compensation Deed (GCD) on 29th July 2020.



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ARAC's new task is to support and influence the creation of the all-important **ROAD MAP** for Zimbabwe. This is currently undergoing its preliminary stages and should by now, or at least by 15th Oct come out with a preliminary draft itinerary.

To place matters in context I would just like to remind all that the CFU has two constituencies, those OFF and those ON farms. The CFU has been instrumental in guiding the CSC regarding compensation for former farmers and at the same time providing a basic but pivotal structure for farmers who remain ON the Land. ARAC has for many years focused purely on matters affecting Former Farmers, allowing more freedom for CFU HQ to concentrate on more traditional issues. For many years the CFU has managed to remain in existence by downsizing both premises and Staff. In this respect I now speak of the CFU staff; it is to their great credit that despite redundancies and effective pay cuts (due to the collapse of our currency) our staff has managed an ever increasing work load. Credit must go to Ben Gilpin for heading up this team; he has given his all. ARAC holds only a limited brief regarding the operations CFU undertakes for its current ON farming members. However it is appropriate to applaud the Director Ben Purcell-Gilpin for his unstinted loyalty and the extreme hard work he has put into maintaining a semblance of normality both representing farmers on the various statutory bodies and promoting Zimbabwe Agriculture both locally and internationally. Ben has decided to retire shortly and in this regard he will be sorely missed.

With this in mind I would appeal to ALL operational Farmers to ensure they rise to the occasion and ensure that Ben's successor is given all the support he will need. In particular I speak to those Current Farmers who enjoy the fruits of the CFU's influence within GoZ bodies but who have been reluctant to contribute. YOUR CFU is an essential link in the chain to the future success of your very own enterprises. You may not recognise it, but the reality is that the CFU has demonstrably reduced the increased costs of many of your inputs, and this saving is perhaps as high as 20 times the cost of your subscription to the Union. What better investment can you have? I urge you to play your part, pay your subs and join in with the traditionally Zimbabwean Farmer unity. I cannot think of any honourable reason not to contribute your share.

Returning to purely ARAC matters, I wish to compliment the ARAC Committee Members for always making themselves available for meetings over the Past year. In particular I would mention and applaud those who despite their infirmities have made such a grand effort to attending at short notice. In the final stages of the Draft Deed debate, some robust opinions were expressed. At several joint Council/ ARAC meetings Andrew Pascoe allowed a full expression of all views. Let there be no doubt about it all Councillors were fully briefed and allowed a free vote. Ultimately, CFU Council voted unanimously to support Andrew's signing of the GCD, having given extensive thought to the broader implications

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. It is absolutely essential that CFU continues to represent us. Our President, Andrew Pascoe can only do this if he is funded sufficiently.

ARAC was created within CFU to focus on Compensation issues, as Chairman of ARAC, I was appointed to the Compensation Steering Committee together with the CFU President, two representatives from Matabeleland, two former CFU Presidents, one of which, John Laurie, is



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particularly well known by all. He has driven the compensation Saga for the last two decades. Despite John's infirmities and stepping aside as the Chairman of the CSC, John has attended nearly all the CSC meetings (sometimes twice a week) and remains a strong guiding force advocating particularly for those elderly and financially distress colleagues of ours. John continues daily to lobby extensively. Thank you yet again.

In this respect I should like to thank Andrew Pascoe, the CFU President for granting ARAC members, access to CFU Council on at least four occasions over the past year. The Council is the senior body and ARAC is a sub Committee. Andy's acceptance of ARAC's important contribution to the Compensation debate has made ARAC's views ever more important.

The most important development, for ARAC, this year has been the signing of the Global Compensation Deed.

Whatever the various dissenting views a few people may have, there can be no doubting that after two decades of stagnation with little or no movement, the signing of the Global Compensation Deed is nothing short of momentous. I acknowledge the agreement is not everything we might have wished for but surely we must look to the positives and lend support to our unbelievably hard working Team of CSC farmer representatives. In this regard, few farmers can have any real idea of the enormous amount of time and resources that are put in by your representatives. It's not just the meetings but the calls at any time of night or day (weekends as well), the transport and printing ink, and this apart from time spent away from private and business life. Recently, in addition to all their other responsibilities, Charlie Taffs, Harry Orphanides, John Reid-Rowland and Andrew Pascoe have all been appointed to the Joint Resources Mobilisation Committee (JRMCM) to contribute to the creation of the National and all important ROAD MAP. We do now and will continue to owe them a great debt of gratitude. These Gentlemen have all given their time freely and absorbed all their own expenses willingly. It is simply not fair on them or their families that they should be even allowed to continue funding themselves without our support. **PLEASE MAY EVERY ONE OF US PAY OUR SUBSCRIPTIONS TO ENABLE THE PROCESS TO PROCEED TO FINALISATION?**

The only way forward is to negotiate, negotiate and negotiate with the *de facto* and *de dura* authorities in the Zimbabwe Government in "Good faith". Obdurate demands will lead nowhere, and will torpedo the possibility of resolution of our twenty year old struggle.

The Deed is not like a formal commercial investment agreement from which parties can just decline to continue (or walk off the field). It is a political opportunity for the whole Zimbabwean nation, to move forward with the assistance of the World's premier funding and financial institutions, guiding a structured recovery for our entire economy.

Some have asked "What's the hurry?". Well surely we must strike while the irons hot. A week can be a long time in this environment. Image a lukewarm response to the "Olive branch" offered by GoZ. Scorning this opportunity could have set back any chance of compensation for MORE decades.

Some have asked for greater transparency. However we all know, especially those with experience, that we cannot have a multitude of voices with varying agendas and expect a swift resolution



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without some compromises that are often uncomfortable for us. The key players acting on behalf of farmers are honourable men who have dedicated the last decade or so, to finding a solution, in the best way they can. They have come through the ranks democratically and emerged as acclaimed leaders because of their particular talents. It is a pity many of their detractors have not contributed to the exercise until the last minute. It cannot have gone unnoticed in our constituency that for three years some form of Compensation has been on the table. Transparency and reasonable inquiry is fine but a lot of the commentary on social media has been unkind or pure theatrics endangering the Deed. All farmers will understand that is so easy to criticise yet so difficult to draw two formerly irreconcilable opposing sides together. This can only occur in an environment of compromise and increasing trust.

So let's look at the positives:-

1. The Global Compensation Deed value is now on the National debt
2. Dormant Title holding farming companies have now been regularised
3. The Ministry of Finance have begun the process of acquiring funding
4. The Government of Zimbabwe have made peace with the CFU
5. The Ministry of Finance has released ZWL funding to cover the Interim relief second program which is now in progress
6. Farmers who accepted some payment for their immovable assets prior to the Deed will be able to claim make up payments
7. Farmers who have managed to remain on their farms are to be offered a swift route to 99 year leases
8. There are to be no more downsizing of fully productive farms
9. International assistance has begun towards creating the all-important Road Map and this is going really well and will take some time to do properly
10. New Land beneficiaries are to be taxed
11. New tradable tenure is being established
12. New Land bank is to be established

All the above within a few weeks of the signing of the deed. To those criticising the agreement, I say "come up with viable alternative", so that we may interrogate such alternatives, as you have done to the DEED.

What the vast majority of Farmers have said to me is "I just want to resolve this issue with USD in my O/S account before I pass this problem on to my Grandchildren".

Twenty years ago the membership stood at approximately 4,000 members, owning approximately 5,300 titles. I would again urge you all to renew your CFU subscriptions to see this process through to a successful conclusion.

I am extremely proud to applaud the Intensive Farmers (largely from Mashonaland) who have shown huge unity of purpose and honour by sharing with Extensive Ranchers (generally from Matabeleland and the Low Veld) such payments as may be forthcoming equably. Thank you all, I do hope this unity will be reflect in the arrival of Subs into the CFU coffers.



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INTERIM RELIEF TWO is now well underway. Hopefully this time round we will not get the same problems we had with those who received last year.

However we can maybe anticipate some snags with NEW applicants. Last year's exercise helped identify several complications involved in proving claims. I quote from last year's report. "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."

SO PLEASE BE PREPARED

THE ROAD MAP is all important to the future of our country. The engagement is held under Chatham House Rule which means *"When a meeting, or part thereof, is held under the Chatham House Rule, participants are free to use the information received, but neither the identity nor the affiliation of the speaker(s), nor that of any other participant, may be revealed."*

So.... without revealing any identities may I say that generally huge progress has been made in respect to coalescing a consensus from the otherwise diverse opinions guided by proper internationally respected professionals? The Road Map itinerary is very comprehensive. It covers ALL the questions hitherto brought up on social Media and a lot more. The areas include:

- Resolution of virtually all the issues centered round the recovery of our nation
- Monetary Issues (Debt, Arrears, Currency, Maturity Risk)
- Land tenure issues Deeds 99 year leases Bankability Transferability AFC type issues
PROPERTY RIGHTS RECOGNISABLE BY THE UNITED NATIONS
- Raising Funding for both Immovables and land
- Legal Issues, enabling legislation needed, Illegal occupations
- Quick Payment in USD ESCROW Auditing One off payments Urgency Guarantees
- Administration arrangements Reporting Communications Perceptions

Having sat in at the back of Zoom meetings I can say that all the participants (Especially the International professionals) are completely up-to-date and familiar with our Zimbabwean Situation. There is a complete spectrum of our concerns to be resolved.

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



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I have no doubt that we have a Bumpy Road map to traverse, but with goodwill on both sides the journey will be achieved. Please make sure we have enough “Petrol”!

Tony Purkis heads up ValCon as MD and similar gratitude goes to him for his persistent leadership and patience ensuring the credible Global Valuation was finally agreed. His team, in particular Shallon Bester and Wendy De la Fargue were magnificent organising and following up endlessly on the Interim Relief exercise of last year. Hopefully they have identified the problems and can have a smoother run now

Finally

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!!

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.

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 this year’s issues.

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 of ARAC



Agriculture Information Service Department Report

INTRODUCTION

This paper serves to give developments that have occurred in the economy and the agriculture sector since the last Congress in October 2019. It also contains production data for the 2019/20 season.

CFU/HIVOS PROJECT

CFU in partnership with HIVOS has been working on a “Women at Work project.” The project was aimed at improving working conditions for farm workers, particularly women, through capacitating the employer. The project was based on the Three P-Pillar Approach; Profitability, People and Planet. The programme sought to help employers understand compliance issues in the horticulture sector and help them comply with the requirements of their various exports market and local labour laws through a series of assessments and trainings. Capacitation of employers has been through various farmer engagements that include farm awareness visits, training workshops targeted at the farmers themselves, HR personnel, compliance officers, and women representatives on farms as well as other senior personnel staff. Once employers are equipped with the knowledge on compliance the benefits of complying will cascade down to the employees’ welfare. In line with that CFU also developed a horticulture standard, Zimbabwean Good Agricultural Practice (G.A.P.-ZIM) to ensure product safety for both local and export market. CFU currently working on getting the GAP accredited by Global GAP to make it easy for local exporting farmers. CFU continuously engaged policy makers to ensure critical issues affecting the horticulture sector and agriculture at large are addressed and resolved in order to ensure viability in farming operations. The Union was also actively involved and played a leading role in the development of the Horticulture Development Council to ensure organised and effective representation of horticulture farmers.

ECONOMIC DEVELOPMENTS

The overall economy is forecasted to contract by 4.5% in 2020 against an initial projection of 3% growth due to the impact of recurring drought, currency volatility and COVID-19 outbreak. Inflation is expected to drop to 300% by year end from the 785% reached in May 2020. The galloping inflation and unstable exchange rate which characterised the greatest part of the year has undermined confidence in the financial system. There is generally lack of trust in the financial authorities and policies they make as most of the times they are made without proper consultations of the people or institutions involved. Currency woes have been the major problem of our economy and finding a lasting solution to the currency question is of paramount importance. Lack of an efficient official foreign currency exchange market had contributed to the proliferation of illegal foreign currency



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trading, which had detrimental effects to the economy and prices had tended to track the speculative nature of the alternative system. The monetary authorities went through different monetary regimes ranging from a hard peg of 1:1 with the USD, Interbank Market, Reuters System, fixed exchange rate and now the Currency Auction in a bid to achieve currency stability. On June 23 2020, the Monetary Authorities introduced the Foreign Exchange Auction Trading System which saw the exchange rate depreciating from USD1:25ZWL to USD1: 57ZWL at the first currency auction. The foreign exchange auction trading system was adopted to foster transparency and efficiency in the allocation of foreign currency. The auction market is still in its infant stages but its impact is starting to trickle down in the economy. Since the introduction of the auction system prices have relatively stabilised and there is now a possibility of convergence between the parallel market rate and the auction rate.

COVID-19

Zimbabwean like all countries around the globe has felt the impact of the COVID-19 on its economy. COVID-19 was first identified in Wuhan City, Hubei Province, China, in December 2019. The disease has now spread to almost all countries and territories around the world, with 46.8million cases confirmed cases and 1.2 million deaths globally as of 03 November 2020. Zimbabwe has not been spared as it recorded its first COVID-19 case on 21 March 2020. There was a steady increase in the number of cases in the months of April to July. In August, a surge in cases was reported, rising from 3659 on 1 August 2020 to 5378 on 18 August 2020. As of 03 November 2020 Zimbabwe had 8 389 confirmed coronavirus (COVID-19) cases and 245 deaths.

The Zimbabwean government declared the COVID-19 crisis a “national disaster” on Friday, March 27, a move allowing it to commandeer State resources towards fighting COVID-19, to use emergency regulations, and to deploy personnel for the same services. The government began a nationwide lockdown on March 30, which was slightly eased and extended indefinitely on May 16. Although the agriculture sector was spared and considered essential during the lockdown the effects of the lock down on business were felt and greatly affected viability of many operations.

According to the IMF, Sub-Saharan Africa is contending with an unprecedented health and economic crisis. While the onset of the pandemic was delayed in sub-Saharan Africa, and infection rates have been relatively low compared with other parts of the world, most countries took precautionary measures, like the rest of the world, and shut down the majority of economic activities except essential services, dealing heavy blows to the economies. Overall, the region is projected to contract by minus 3 percent in 2020. The largest impact of the crisis on growth has been for tourism-dependent economies, while commodity-exporting countries have also been hit hard.

SECTORIAL PRODUCTION

- Agriculture output is set to contract by 0.2% against a 5% growth projected initially.
- Zimbabwe’s manufacturing sector will contract by 10.8% in 2020, against the initial projection of -1.9%.
- Mining will shrink by 4.1% due to lower appetite in global consumption of minerals.



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- Hotel and distribution will drop by 7.4% due to drop in hotel occupancy given COVID-19 restrictions
- Foreign Direct Investment (FDI) is forecast to fall by 40% to US\$150.4m this year from the US\$249.5m recorded in 2019. In the first half, FDI inflows were just US\$71.2 million compared to US\$111.6 million recorded during the same period in 2019.
- The banking sector remained adequately capitalized, with aggregate core capital of ZWL\$10.74 billion, as at 31 March 2020.

OVERVIEW OF THE 2019/20 SEASON

Season Quality

The rains for the 2019/20 season started in the second and third weeks of November. The 2019/2020 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 late December and January as well as the early cessation of the season negatively affected the planted crop. The season was characterized by several dry spells of different duration lasting to up to 55 days in some places. These dry spells coincided with periods of very high temperatures with some stations including Chiredzi, Beitbridge, Zvishavane, Chinhoyi, Lupane, Kadoma, Gweru, Zaka, Hwedza having recorded record- breaking temperatures of up to 42° C during the month of December. The second half of the season however, performed better than the first half, with February contributing significantly in terms of accumulated rainfall amounts between 200mm to 600mm in some districts.

Crop and Livestock Production

The estimated maize production is at 907 628 Tonnes (T) which is 17% more than the 776 635 T produced during the 2018/2019 season. Sorghum production is expected to be 103 684 T which is 158% more than 40 215 T obtained during 2018/2019 season. Finger Millet production is expected to be at 9 799 T which is 41% more than 6 947 T produced in the 2018/2019 season. Pearl Millet Production is expected to be at 39 032 T which is 39% more than 28 047 T obtained during 2018/2019 season. Total Cereal production is estimated at 1 060 143 T against a national cereal requirement of 2 227 782 T for human and livestock consumption. There was no carry over stock at GMB from the previous season hence a larger deficit compared to last year. Zimbabwe's food security continues to deteriorate as it will need to import 1.3million tonnes of maize to cover for the deficit.

On cash crops cotton production is estimated at 101 000 T which is 52% more than 76 687T obtained in 2018/2019 season due to increased coverage of the Presidential Input Scheme. Tobacco production is estimated at 183.4 million Kg compared to 259. 5 million Kg in 2018/2019 season which is a 29% decrease. Soyabean production is estimated at 47 088T compared to 60 068T in 2018/2019 season which is a 22% decrease. Groundnut production increased by 23% from 70 902 T in the 2018/2019 season to 87 479 T this season. Sugar beans increased by 33% from 9 528 T in 2018/2019 to 12 650 T in 2019/2020 whereas cowpeas increased by 26% from 12 655 T to 18 430 T and round nuts production decreased 19% from 29 396 T in 2018/2019 season to 23 832 T. Sweet potatoes production increased by 30% from 88 248 T to 114 558 T.



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There was an overall increase in area and production under horticultural crops for the 2019/2020 season. Macadamia production for the 2019/2020 increased by 44% from 43 064 MT to 61 913 MT. Sugarcane production is estimated at 5 860 931 MT which is 5% increase from 5 562 674 MT obtained in 2018/2019 season. Coffee production increased by 9% from 531 MT in the 2018/2019 season to 579 MT this season. Tea production has increased by 6% from 37 835 MT to 40 185 MT. The production of Irish Potato has increased by 45% from 408 158 MT to 592 779MT.

On the livestock sector the national beef cattle herd declined by 5.7% from 5 774 525 cattle in 2018 to 5 443 770 cattle in 2019. The average national cattle mortality rate increased from 5% in 2018 to 9% in 2019. The national calving rates range from 34% in communal areas to 46% in the large-scale commercial sector against a national target of 60%. Grazing availability has been critical in some districts of Matabeleland North, Matabeleland South, southern districts of Midlands and Masvingo. Water for livestock has been available in most districts with shortages expected in the traditionally dry parts of Midlands and the southern provinces before the next rainy season. The number of beef cattle slaughtered at registered abattoirs decreased by 12% from 266 220 in 2018 to 235 018 in 2019. The average national off-take rate for cattle is 6% whilst off take for sheep and goats is 9% and 11% respectively, against an expected target of 15%. Total milk production rose by 6%, that is, from 75 422 158 Litres in 2018 to 79 896 215 Litres in 2019. A total of 74 million day old broiler chicks were produced in 2019, a 19% decline compared to the 91 million chicks produced in 2018. An estimated 24% increase in table egg production was recorded in 2019 (50.4 million dozens) compared to 36.4 million dozens the previous year. Pig slaughters at abattoirs increased by 11% to 192 747 in 2019. The biggest challenge in livestock production has been the high stock feed prices which are affecting enterprise viability.

LOOKING FORWARD

Zimbabwe's economy is forecast to rebound in 2021 as the country shrugs off the effects of the coronavirus pandemic and the government takes further measures to stabilize the currency. According to the International Monetary Fund (IMF), Zimbabwe's economy will rebound next year and grow 4.2 percent from a decline of 10.2 percent IMF forecast for 2020. As the domestic and global economies recover, the IMF said Zimbabwe's annualised consumer inflation, which it puts at 255 percent for 2019, will close at 622 percent this year, but fall drastically to 3,7 percent in 2021. Key drivers of next year's growth include an expected good agricultural season, improvement in exports and commodity prices, as the world economy kicks into gear again, along with a recovery in both private consumption and investment. Let's keep our fingers crossed the best is yet to come.

Best Wishes!!!

Antonnette Goora (Chingwe)
CFU Chief Economist



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AI SD Production Trend

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	2020*
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	907.00
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	110.00
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	104.00
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	9.80
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	49.00
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	183.00
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	101.00
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	47.00
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	87.00
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	6.00	9.00
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	40.00
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	0.53	0.58
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	10.70
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	18.00
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	256.00
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	17.00
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	787.00
Irish Potato																				408.00	593.00
Macadamia																				43.00	62.00
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	80.00
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	235.00
* Estimates																					



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Embracing Information and Communication Technology (ICT)

Innovation and digitalization in today's world has resulted in increased virtual arrangements taking shape during the COVID 19 pandemic. In some instances this has paved way for ease of doing business and reduction of operational costs as most people are either working from home or have reduced the number of personnel working due to the restrictions that came into being because of the COVID 19 pandemic.

For most traditional businesses, operations the year 2020 bring no joy as it was not "business as usual" due to the disruptions caused by worldwide lockdown and restrictions. However, ICT developers will remember 2020, as the year that saw the upsurge of the use of ICT tools and software's developed previously. The need to have limited physical interactions has led to the adoptions of different ICT platforms for meetings and other social interactions. This has seen an increased upsurge in the use of platforms such as zoom which was developed in 2011 and has most people only adopting it in 2020.

Agriculture has not been spared as the agri-food sector is being transformed from having wage negotiations over different business platforms to increased crop monitoring using big data platforms. Although it has been difficult for most people to adapt it is essentially the new way of doing business. Different tools have shown their sustainability and resilience for further use even after COVID 19.

In most African States connection and Connectivity challenges are still being faced which has offered risk takers and entrepreneurs to be able to take advantage of this opportunity as already a problem has presented itself for problem solving. This approach has brought together scientific knowledge and practical experience from living and working on the land to be put to use by many early adopters.

Given the situation farmers can take advantage of COVID 19 and produce like never before as a way of feeding into the food system as the ICT developments promote precision farming for increased production and productivity.

Chrispen Mununga, Economist

Labour Affairs and Advocacy And Lobby Report

Introduction

The pretence of parity of the USD and RTGs was finally acknowledged and abandoned in January 2019. This had a significant impact on the entire economy and the agricultural sector was no exception. Real wages and allowances across all sectors declined in real terms and with this slide social partners to the NEC Agriculture have had numerous rounds of negotiations to adjust wages and allowances as inflation soared. By the end of the current licensing period in September 2020, some stability had returned and the ZWL which had been around 2: 1 in March 2019 and close to 16:1 in September 2019, was now at a little over 80:1 in Sept 2020 on the RBZ weekly forex auctions. Nonetheless, the reality of the continued pricing of many commodities based on a higher exchange



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rate has left farm worker earnings below levels when the economy was dollarized and there is therefore constant pressure to renegotiate higher packages. The differentiation into multiple subsectors has necessitated improved coordination amongst employers and, several all sector employer meetings have been held to ensure coordination of efforts.

The disruption to mobile money transfers, in particular through the regulation of ECOCASH by RBZ caused considerable disruptions for farmers. We are particularly grateful to Stewart Wilson for the sterling effort he continues to put in for farmers struggling to get solutions in this regard.

CFU has played a pivotal role in these processes and endeavored to serve members across the country and sectors to improve industrial harmony. The CFU is continuously involved in wage negotiations, trainings, provision of advice and education, assist in disciplinary proceedings, dispute resolution, resolving strikes and representing the farmers in need of labour relations help. This year was adversely affected by the COVID 19. The Union has also facilitated the processing of SI 6 clearance letters for numerous former employers. Interesting statistics emerge from the aggregated data. On average in 2002 when the SI was introduced employers paid out Around ZWD 10 Million per farm. Average employment was 73 workers who each got an average amount of ZWD 140 Thousand. In real terms, with the prevailing exchange rate at 55 ZWD: 1 USD this equated to a cost of close to USD 190 Thousand per farm and a little over USD 2,500 per worker. Last year's IR1 And the current IR2 will scarcely match what employers paid individually to their compulsorily retrenched workers.

Wages: The following table give comparative wage levels across the period:

Sector	BASIC WAGE IN ZWL				
	Oct-19	Feb-20	May-20	Jul-20	Oct-20
Gen Ag	360	550	1200	2260	3175
Hort	356	559	1240	2380	3360
Tea and Coffee		620	1300	2400	3401
Agro	465	702	1551	2950	4600
Sugar Cane	400 +Cola	1200	2070	3280	5000
Kapenta	450	756	1633	3100	5000

Wage increases over the past year ranged between 880% in General Agriculture and 1100% in Kapenta. Considerable time and effort has been spent on behalf of members negotiating to keep wages within affordable limits. Unions have consistently sought to get wages instated in USD and



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negotiations have invariably also focused on the inclusion of standard hampers. Both these pressures have been resisted as the economy has stabilized and the hamper issue has been referred to individual employers to deal with at enterprise level. It is notable that now many employees on farms who previously earned below the tax threshold, are now in the PAYE Threshold of ZWL 5000. This caused considerable erosion of basic earnings and also put more pressure on employer costs.

Capping: During the period under review Capping negotiations have been concluded as follows:

AGRO Sector Capping:

Fixed term contracts shall become permanent after 3 years of continuous service with all benefits as per the CBA and Labour Act. A break of 30 days with the same employer will not be construed as a break in continuous service. The agreement is effective 1st March 2020.

HORT Sector Capping:

1. Any contract of employment that specifies its duration or date of termination shall, despite such specification, be deemed to be a contract of employment without limitation or time upon the expiry of three years of the concerned employee's continuous service and thereupon such employee shall be afforded the same benefits as are in the Labour Act (Chapter 28:1) or any collective bargaining agreement provided for those employees who are engaged without limitation of time.
2. The qualifying service period of 3 years shall commence with effect from 01March 2020 for employees who were in service of the employer as at the effective date of this agreement.

Allowances which had previously been increased in December 2019 were increased in mid-year becoming effective 1st July 2020:

Transport: Actual cost to be paid by the employer

Accommodation: RTGS 400

Fuel:RTGS 120

Light:RTGS 175

Dog Handling:5% of employee's basic wage

Fire arm:5% of employee's basic wage

During the year new allowances not previously paid were agreed as follows:

Travel and Subsistence: Actual cost to be paid by employer

Accommodation construction allowance for on-site occupation by employee: a once off payment equivalent to two weeks basic pay for the employee.



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Other allowances referred to in SI 116 of 2014 namely, Production, Danger/ Risk and Bicycle, have been referred back to the subcommittee for allowances. It will be recommended the SI is amended if agreed.

NSSA rates have been increased by action of SI 108 and SI 109 of 15th May 2020 pushing the contribution rate up to 9% from the current 7%. This will be split equally between employer and employee. The previous Maximum pensionable Salary of ZWL 700 has been raised to ZWL5000.

NEC DUES. CFU strongly resisted the introduction of percentage related dues however was not able to prevent the change. During the year the NEC did however review downwards the Industry statutory payments with a Partial Exemption of NEC Agriculture dues. Total combined dues were suspended from April and are still in place set at 3%; being a contribution of 1,5% of an employee's basic monthly wage and the balance of 1,5% being paid by the employer.

The use of Zoom to convene meetings should have reduced NEC operating costs significantly and we hope that the situation as regards dues can be controlled in future.

Tobacco Subsector: During the year the NEC was called on by employee representatives to introduce a new Tobacco Sector. The matter was roundly rejected by employers in the Gen and Hort sectors which currently cover such operations and a resolution was agreed that NEC should conduct a job evaluation and grading review across all sectors as a more appropriate way forward. The primary legislation covering agriculture, namely SI 116 of 2014 is still to be amended. The process of final consultations should result in agreements before the end of 2020.

Occupational Health and Safety: During the year the SI197 Of 2000 was gazetted. This a code of practice will in due course have a major impact on farm operations as it covers Occupational Safety, Health and Environment (OSHE) in Agriculture in Zimbabwe. NEC will soon be conducting training courses in the next year.

General Labour affairs: CFU Labour Consultant Luxmall Nhutsve continues to provide valuable service to members across the country and he had a wide ranging input in the following areas.

Disputes: Notable cases of disputes of rights and interests had been recorded and were resolved around the country. The labour disputes were being referred to CFU where in some cases they were internally resolved. However some cases were referred to Ministry of labour and the NEC Agriculture where the CFU legal affairs department attended the cases representing respective farmers where such cases were completely resolved.

Trainings: Ignorance of law has no defence and in order to ensure compliance to the regulations the trainings were done so as to equip the farmers and its workers to have an appreciation of the prevailing labour laws. Trainings were conducted for a **HIVOS project** in Midlands, Mashonaland Central, Mashonaland East and Harare. Further to that the CFU had managed to do special trainings



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on the following farms: Running Dogs [Harare], Bigtull Investments [Chegutu], Selby Farm [Harare] and Watershed Farm [Marondera], ART Farm [Harare].

Advisory Role: The labour inquiries continuously trickle in through different communication channels from the members. All the inquired issues were attended to accordingly with specific advices done satisfactorily in light of the prevailing labour provisions.

Non-Compliance with law: It is still a concern in some quotas of agricultural farms that some farmers are not complying with prevailing labour regulations. Areas with non-compliance issues are: *Wages and allowances; hours of work; payment of wages during holidays and off days; accommodation allowances for non-accommodated employees, statutory deductions; ignorance of following termination procedures in the code of conduct; illegal job actions and management of fixed term contracts.* **NB: Trained farmers have significantly improved in their compliance.**

Illegal Collective Job-Action: Strikes: A total of 7 strikes were reported where farming activities were adversely affected with some illegal strikes that hits our sector. The main reasons for strikes were low wages, protective clothing issues, payment of wages through MyCash, TextaCash and Ecocash without consultation, workers wanting to be paid in US dollars.

Recommendations:

- Intensification of labour training and workshops will equip farmers with labour regulations knowledge and help reduce non-compliance of law.
- Intensification of membership recruitment exercise
- Intensification of labour inspections by Commercial Farmers Union.

Conclusion:

In a nutshell, CFU labour affairs department continuously provides service to members and non-members on labour related issues, though faced with some challenges in terms of financing activities. COVID-19 continues to adversely affect operations, however in the circumstances and under such conditions, the department however made sure the labour needs of the farmers are continuously catered for.

Compiled By Ben Gilpin and Luxmore Nhutsve



8. 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.

9. 2020 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 2020. Without the generous support of these organizations, 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

PRESIDENT

10. APPENDICES

- Link to Speech by the President of the World Farmers Organisation
- Link to Speech By Major General (RETD) G. Chanakira <http://www.cfuzim.com/wp-content/uploads/2020/11/chanakiracongress.pdf>
- Link to Oscar Award Speech <http://www.cfuzim.com/wpcontent/uploads/2020/11/oscar2020.pdf>