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# ZIMBABWE AGRICULTURAL COMPETITIVENESS PROGRAM

FIRST QUARTERLY PROGRESS REPORT, YEAR FOUR  
(OCT – DEC 2013)

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# ZIMBABWE AGRICULTURAL COMPETITIVENESS PROGRAM

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(OCT – DEC 2013)**

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# ACRONYMS

ACE	Agricultural Commodity Exchange
AMA	Agricultural Marketing Authority of Zimbabwe
AU-IBAR	African Union Inter-African Bureau for Animal Resources
CAADP	Comprehensive Africa Agricultural Development Program
CALR	Centre for Applied Legal Research
CFU	Commercial Farmers Union
CIBER	Competitiveness Impacts of Business Environment Reform
CIG	Commodity Industry Group
COP	Chief of Party
COTR	Contracting Officer's Technical Representative
DAI	Development Alternatives Inc.
DCOP	Deputy Chief of Party
DLVS	Department of Livestock and Veterinary Services
DOHOPA	Domboshawa Horticulture Producers Association
DR&SS	Department of Research & Specialist Services
DVS	Department of Veterinary Services
EMA	Environmental Management Agency
EU	European Union
FaaFB	Farming as a Family Business
FACHIG	Farmers' Association for Community Self-Help Investment Groups
FFFR	Fertilizers and Farm Feeds Remedies
FMD	Foot and Mouth Disease
FPMAZ	Fresh Produce Marketers Association of Zimbabwe
FTFMS	Feed the Future Monitoring System
FY	Financial Year
GlobalGAP	Global Good Agricultural Practices
GMO	Genetically Modified Foods
HPC	Horticulture Promotion Council
ISO	International Standards Organization
ITC	International Trade Centre
LCS	Livestock Competitiveness Strategy
LITS	Livestock Identification and Traceability Systems
LMAC	Livestock & Meat Advisory Council
LTTA	Long Term Technical Assistance
MABC	Matabeleland Agri-Business Chamber
MABF	Manicaland Agriculture Business Forum
MAPA	Murehwa Agricultural Producers Association
MAMID	Ministry of Agriculture, Mechanization & Irrigation Development
MDM	Mechanically Deboned Meat
M&E	Monitoring and Evaluation
MMATA	Mbare Musika Apple Traders Association
MPPA	Manicaland Poultry Producers Association
MoL	Ministry of Labour
MoF	Ministry of Finance
MoU	Memorandum of Understanding

MWAGCD	Ministry of Women Affairs, Gender & Community Development
NCFE	National Contract Farming Framework
NGO	Non-Governmental Organization
OIE	World Organization on Animal Health
PIB	Pig Industry Board
PMP	Project Monitoring Plan
PPAZ	Pig Producers Association
RIA	Regulatory Impact Analysis
RDC	Rural District Councils
SADC	Southern Africa Development Community
SAZ	Standards Association of Zimbabwe
SI	Statutory Instrument
SIRDC	Scientific and Industrial Research and Development Centre
SMA	Stockfeed Manufacturers Association
SNV	<i>Stichting Nederlandse Vrijwilligers</i> (Foundation of Netherlands Volunteers)
STTA	Short Term Technical Assistance
TAMIS	Technical and Administrative Management Information System
USAID	United States Agency for International Development
USG	United States Government
VETGOV	Veterinary Governance
WABAZ	Women's Alliance for Business Associations in Zimbabwe
WRS	Warehouse Receipt System
ZAA	Zimbabwe Abattoirs Association
ZADF	Zimbabwe Agricultural Development Fund
ZAWA	Zimbabwe Alliance for Women in Agriculture
ZCFU	Zimbabwe Commercial Farmers Union
ZEPARU	Zimbabwe Economic Policy Analysis and Research Unit
ZFU	Zimbabwe Farmers Union
ZNFU	Zimbabwe National Farmers' Union
Zim-ACP	Zimbabwe Agricultural Competitiveness Program
Zim-AIED	Zimbabwe Agricultural Income and Employment Development Program
Zim-ASSET	Zimbabwe Agenda for Sustainable Socio-Economic Transformation
ZPA	Zimbabwe Poultry Association
ZWPFT	Zimbabwe Women Poultry & Small Stock Farmers Trust

# CHAPTER I: HIGHLIGHTS AND OPERATING ENVIRONMENT

## 1.1: ZIM-ACP IN BRIEF

Zim-ACP is designed to provide support to Zimbabwe's agribusiness sector, by strengthening representative farmer organizations on how they can improve the business environment for the agricultural sector. It aims to do so via three interlocked components:

**Component 1** - supporting and strengthening representative farmers unions, commodity associations and agribusiness associations and assisting them to develop their analytical and advocacy capacity,

**Component 2** - increasing the efficiencies in agricultural markets, developing and applying improved technologies and enhancing the capacity of market institutions; and

**Component 3** - enhancing the capacity of business service providers to deliver quality, demand-driven trainings and technical assistance at a firm and farmer level.

## 1.2 QUARTERLY HIGHLIGHTS:

LMAC's readiness as a private sector representative body and its past advocacy efforts were recognized. LMAC was incorporated into and made the Vice-Chairperson of the Livestock Policy Hub (LPH) which was launched on December 16, 2013. Zim-ACP packaged the findings and recommendations from past studies and stakeholder dialogue meetings into material for dialogue on regulatory/administrative procedure reforms as outlined in **Annex 1**. As a result, Zim-ACP's work with these organizations received further recognition within MAMID. At the launch of the Livestock Policy Hub, the Secretary for MAMID and the Principal Director of the Department of Livestock and Veterinary Services acknowledged and lauded the technical support Zim-ACP provided to LMAC in the review of Animal Health Act and the Fertilizer, Farm Feed and Animal Remedies Act.

On October 23, 2013, SAZ held a stakeholder consultative meeting on the initiative, spearheaded by the International Standards Organization (ISO) in collaboration with the World Organization for Animal Health (OIE), for the development and adoption of ISO Food Products WG6 Animal Welfare. Once there is international agreement on the proposed standard, Zimbabwe farmers and producers would be able use the standard to access markets. The meeting acknowledged the review of the Animal Health Act, supported by Zim-ACP in FY 2012 and FY 2013, which incorporated Animal Welfare.

HPC was accepted as a GLOBALGAP member for 2013 and 2014. HPC adopted the LocalGAP standards for Fruits and Vegetables, a subset of the GLOBALGAP. LocalGAP is a capacity building program, in which enrolled producers will be assisted through regular and guided assessment by Farm Assurers to comply with the GLOBALGAP standard and eventually achieve certification. Participating in the program demonstrates that a producer and the industry are responding to consumer concerns regarding food safety, animal welfare, environmental protection and worker safety. This enhances chances for accessing markets that demand these standards.

Leaders of LMAC and its association members (ZPA, SMA, PPAZ, ZAA) had an audience with the newly appointed Deputy Minister in the MAMID responsible for Livestock. They briefed the Minister on the challenges facing the Livestock and Meat CIG which included overbearing regulations and payments of statutory levies and fees for the same services to multiple regulatory agencies. The Deputy Minister acknowledged the role of the private sector in promoting the economic wellbeing of the sector and called for greater participation, by the private sector, in reviewing and contributing to formulation of policy conducive to improved productivity and competitiveness.

The ZFU 73rd Annual Congress Review and Report carried an article outlining and appreciating Zim-ACP's technical support to ZFU. He highlighted that the Union is now better informed of the need to adhere to its gender policy and mainstream gender in all its programs and activities. Findings and recommendations from USAID/Zim-ACP studies have been used as evidence in lobbying government. Since the capacity building in service provision, the Unions signed MOUs with agribusiness service providers and have since launched an Agribusiness Chamber, a platform for direct engagement with the agribusiness service providers.

### **1.3 OPERATING ENVIRONMENT**

The overall operating environment during the Quarter was generally subdued as a result of the country taking a long time to accept the election outcome. The new government was established and sworn in September, 2013. Although new Ministers were announced and sworn in by October 2013, government's economic policy direction remained unclear until the adoption of the Zimbabwe Agenda for Sustainable Socio-economic Transformation (Zim-ASSET). Zim-ASSET's objectives are focused on economic recovery and growth and sustainable food security. Agriculture, mining and tourism are identified as the prime drivers for the economy. Government programs were only recently outlined on December 19, 2013 with the announcement of the 2014 National Budget.

Both the Zim-ASSET and National Budget recognized stakeholder consultations, Public-Private Partnership dialogue and collaboration as central to the design and implementation of appropriate policies and strategies. This is enshrined in the CAADP Compact signed on November 22, 2013.

While still fluid, the evolving policy environment validated Zim-ACP investment in broadening and enhancing the role of the representative bodies as strategic partners in the formulation and implementation of agricultural policy and strategies at both national and provincial levels. The much anticipated increase in funding for agriculture at the start of the 2014 agricultural season in October 2013 did not materialize. The Bankers' Association of Zimbabwe called for farmers' representative bodies to come up with innovative business and organizational models to give confidence to the lenders. This gave heightened impetus to the installation of the Zim-ACP supported membership database by ZFU and ZCFU. The financial lenders would be able to use the database to identify genuine farmers registered with the unions. The lenders would want the unions to hold their members accountable for loan repayments. The databases give profiles that can be applied in credit rating of farmers applying for loans.

In the 2014 Budget Statement and the Zim-ASSET document, the government put priority on the re-establishment of the Agricultural Commodity Exchange (ACE) and Warehouse Receipts System (WRS) operationalization in 2014. In December, MAMID drafted the Memorandum of Principles that were submitted to Cabinet for approval for drafting a bill to be presented Parliament. If approved, the draft Bill will be presented for Parliamentary debate during the course of 2014. This development heightened interest in farmers' unions to increase the awareness of what ACE and WRS would entail for their members. Zim-ACP will work with the unions on this.

In his speech at the opening of Parliament, the President announced one of the Bills to be presented for Parliamentary debate would be for the current SAZ to be made into a statutory Standard Authority to oversee and regulate the development and implementation of safety and quality standards in the country.

One of the mandates of the Authority will be to ensure that imports into Zimbabwe adhere to the country's established food safety and quality standards. This is a development that would need to be monitored so that it does not entrench anti-competitive behaviour.

The agriculture sector, as with all other economic sectors, is being required to review its Acts and regulations to harmonize them with the requirements and provisions of the new Constitution adopted in July 2013. This is highly prioritized by government. MAMID is seeking stakeholder contribution and participation. Zim-ACP is priming its partner organizations to seize the opportunity to identify and submit the regulations requiring a comprehensive review supportive of improved competitiveness. These include all regulations in Stage 1 and those identified in the Horticulture and Livestock CIGs competitiveness strategies as requiring review.

While the activities in the Quarter were scaled down in line with the funding, undertaking these planned activities had to be subdued as the FY 2014 Work Plan is still pending USAID approval by the end of the Quarter.

## 1.4 PROGRESS TOWARDS INDICATORS

Zim-ACP continues to make progress on most of its indicator targets. As illustrated in table 1.4.1 below, out of 13 indicators the project performed well against most of its indicator targets. Zim-ACP expects to meet the annual targets set.

**Table 1.4.1 Indicator Achievement Table Summary**

Indicator Summary	Year 4 Target		Actual for Quarter 1		Comment on Indicator Achievement to date
4.5.2-43 Number of firms (excluding farms) or Civil Society Organizations (CSOs) engaged in agricultural and food security-related manufacturing and services now operating more profitably (at or above cost) because of USG assistance	4		0		No achievement in the quarter. Target should be met as CSOs are expected to report on impact in the coming quarters.
ACP 1 Value of resources leveraged through partnerships with agribusinesses, agribusiness service providers, NGOs etc	\$200,000		0		No achievement in the quarter. Partner organizations are presenting funding proposals to the donor community and private sector which are expected to yield positive results in the coming quarters.
4. 5.1-24 Number of Policies/Regulations/ Administrative Procedures in each of the following stages of development as a result of USG assistance in each case:  Stage 1: Analyzed Stage 2: Drafted and presented for public/stakeholder consultation Stage 3: Presented for legislation/decreed Stage 4: Passed/approved Stage 5: Passed for which implementation has begun	Stage 1	5	Stage 1	0	During the quarter 10 regulations were analyzed and have moved to stage 3. Annual target expected to be met in coming quarters.
	Stage 2	12	Stage 2	0	During the quarter 10 regulations were analyzed and have moved to stage 3. Annual target expected to be met in coming quarters.
	Stage 3	8	Stage 3	10	Significant achievement for the quarter. Annual target already surpassed.

	Stage 4	3	Stage 4	0	Expect to meet the annual target of 3 from the 10 regulations presented for legislation during this quarter.
	Stage 5	3	Stage 5	0	Expect to meet the annual target of 3 from the 10 regulations presented for legislation during this quarter.
ACP 5 Representative bodies of farmers and agribusinesses and commodity associations effectively advocating in public forums and Parliamentary committee meetings	105		17		Under-achievement for the quarter. The set annual target is expected to be met. Work has been planned to capacity build partner organizations to compile position papers using findings of studies done.
ACP 2 Improvement in services to members by representative bodies of farmers, commodity associations and agribusiness organizations (as measured by increase in new members and retention of current members)	50,000		5,770		Achievement very small for the quarter. Producer associations expect members to renew their subscriptions in numbers after harvest and sale of the dryland crop in Q3
4.5.2-37 Number of micro, small and medium enterprises receiving business development services from USG assisted sources	4,000		2,198		Remarkable achievement for the quarter. The set target will be surpassed if businesses receiving business development services continue to increase in coming quarters following the adoption of recommendations from the services identification consultancy work done in FY 2013.
4.5.2-28 Number of private enterprises, producer organizations, water users' associations, women's groups, trade and business associations and community-based organizations that applied new technologies or management practices as a result of USG assistance	12		8		Remarkable achievement for the quarter. Expect to surpass the target.

USAIDZIM 2 Number of project beneficiaries in relevant leadership positions	512 300 male 212 female	512 331 male 181 female	No achievement in the quarter. The figures are expected to change following elections of leadership in partner organizations scheduled for Q4		
GNDR-4 Proportion of target population reporting increased agreement with the concept that males and females should have equal access to social, economic and political opportunities	45%	-	No achievement in the quarter. Change in gender perceptions to be assessed in trainings planned for coming quarters.		
ACP 3 Number of Clients reached by market facilitation institutions/systems supported by USG assistance	780	550	Remarkable achievement for the quarter from work in the livestock and horticulture sectors.		
4.5.2-11 Number of food security private enterprises (for profit), producers organizations, water users' associations, women's groups, trade and business associations, and community-based organizations (CBOs) receiving USG assistance	12	3	Expect to meet the set annual target		
4.5.2-7 Number of individuals who have received USG supported short-term agricultural sector productivity or food security training	60	9	Work is planned for coming quarters.		
ACP 4 Number of market facilitation institutions/systems that, as a result of USG assistance are in each of the following stages: Stage 1: Undergoing capacity/competency assessment; Stage 2: Undertaking capacity/ competency strengthening; Stage 3: Functional	Stage 1	2	Stage 1	0	
	Stage 2	3	Stage 2	1	Achievement on standards. Process of strengthening is ongoing.
	Stage 3	3	Stage 3	0	Work on standards has been planned for coming quarters

# CHAPTER 2: PROJECT ACTIVITIES

## 2.1 COMPONENT 1: ORGANIZATIONAL STRENGTHENING AND ADVOCACY CAPACITY DEVELOPMENT

### COMPETENCE IN FARMER REPRESENTATIVE BODIES

#### 2.1.1 Strengthening Organizational Capacity of Farmers' Organizations

Over the past three years, Zim-ACP's efforts have supported and strengthened representative farmers unions, commodity associations and agribusiness associations and assisted them in developing their analytical and advocacy capacity. Technical assistance was offered in building the capacity of their leadership in lobbying and advocacy, services provision, leadership and governance skills, presentation and facilitation skills and gender mainstreaming. Organizations that benefitted include ZFU, ZCFU, ZWPFT, FACHIG, LMAC, HPC, MPPA and MABC.

During the reporting period, Zim-ACP conducted follow-up and mentorship meetings with partner organizations to check on progress made in the implementation of their action plans. Most organizations proved to have been strengthened in different ways and were proactive in lobbying and advocacy, services provision, and gender mainstreaming as explained below.

#### Organizations Proactive in Lobbying and Advocacy

One of the success indicators in lobbying and advocacy is when organizations provide public education/build public support through meetings and/or the media. Domboshava Horticulture Producers Association (DOHOPA) a horticulture commodity association affiliated with Zimbabwe Farmers Union (ZFU) had its marketing secretary, Mr. Claudious Marimo featured in both print (Herald) and electronic (Talking Farming on ZTV, and Star FM on Radio) media. In his presentations he motivated horticulture farmers to join their ZFU national horticulture association, highlighting the services they are providing which include representation to government for an improved business environment, market linkages, production skills, etc.

ZCFU held a successful Annual 19th Congress on October 16-17, 2013 which was attended by over 500 delegates running under the theme "Strategies and Innovative Ideas for Agrarian Transformation". Dr. Made, the Minister of MAMID, opened his doors for consultation with farmers unions. He called on the unions to submit to him and his two Deputy Ministers evidenced-based position papers recommending strategies to address challenges facing the agriculture sector. Zim-ACP presented and motivated farmers for greater advocacy to improve the agricultural enabling environment using well-researched evidence-based position papers, drawn from numerous studies done by Zim-ACP. In response to increase for guidance on drafting the position, Zim-ACP compiled the findings and recommendations into a paper of guidelines for advocacy and lobbying. The ZCFU president Mr. Wonder Chabikwa lobbied the MAMID Minister for facilitation of easy access to credit for farmers and regulations that would protect farmers in contract farming. On the first aspect, the Minister's position is that farmers represented by ZCFU should stand on their own without such appeal to government. The farmers should be in a position to engage and convince the commercial banks. The Minister also urged the unions to contribute ideas through the proposed National Contracting Framework.

Following their Annual National Congress, ZFU published a special edition to cover the services that they are providing, development partners they have been working with, as well as proceedings at the Congress. They wrote an article (attached as Annex 1) on the good work being done by USAID/Zim-ACP in supporting, strengthening and assisting their leadership to develop analytical and advocacy capacity.

Lobbying for an improved enabling business environment requires evidence-based research papers.

During the reporting period, ZCFU, FACHIG, ZFU and ZWPFT requested for Zim-ACP's technical assistance in development of position papers using the studies Zim-ACP commissioned in the past three years. Table 2.1 below lists all the studies supported by Zim-ACP. This follows the open door policy that government has presented in which they have openly asked farmer unions at various forums to come up with concrete strategies that will improve the sector.

**Table 2.1: Summary of Supported Studies Informing Zim-ACP Regulatory Analysis for Improved Agriculture Competitiveness**

	<b>Study/ Assessment</b>	<b>Year</b>
<b>Regulatory Assessment Studies</b>		
1	Review of Zimbabwe's Agricultural Regulatory System: Stakeholders' Perspectives	FY2011
2	Cost Benefit Analysis of Live Cattle Imports from Botswana	FY2013
3	Cost of Compliance with Regulations in the Livestock Sector	FY 2013
<b>Competitive Analysis of Value Chains (Competitive Impacts of Business Environment Reforms- CIBER Assessment)</b>		
1	Competitiveness Impact of Business Environment Reform (CIBER) for Poultry	FY 2012
2	Competitiveness Impact of Business Environment Reform (CIBER) for Pigs	FY 2012
3	Competitiveness Impact of Business Environment Reform (CIBER) for Horticulture	FY 2012
4	Competitiveness Impact of Business Environment Reform (CIBER) for Grains and Legumes	FY 2013
5	Competitiveness Impact of Business Environment Reform (CIBER) for Beef and Dairy	FY 2013
6	Competitiveness Impact of Business Environment Reform (CIBER) for Cotton	FY2014
<b>Regulatory and Economic Impact Analysis</b>		
1	Value Added Tax [Chapter 23:12] wheat grain, soya meal, point of lay pullets	FY 2012
2	National Budget SI 154/11 reduction in the duty on galvanized wire, crude soy oil	FY 2012
3	Cotton Production and Marketing SI 142	FY 2013
4	Value Added Tax [Chapter 23:12] removal of Vat on Soybean and Live birds	FY 2013
5	Matabeleland Drought Mitigation Policy	FY 2013
6	Suspension of 5% duty on solvent extracted soya meal imported from non-SADC countries	FY 2013
7	Analysis of Impact of Land Unit Tax on Farm Viability	FY 2013

8	Regulatory and Economic Analysis of the Proposed AMA Poultry and Poultry Products Development SI	FY 2013
9	Regulatory Impact Analysis of Proposed Changes to the Animal Health Act	FY 2013
10	Regulatory Impact Analysis of Proposed Changes to the Fertilizer, Farm Feeds & Animal Remedies Act	FY 2013
<b>Assessments of Market Facilitation Institutions</b>		
1	Feasibility Assessment and Investment Plan for revamping the Livestock Identification and Traceability System in Zimbabwe	FY 2012
2	Capacity Assessment of Quality Standards, Food Safety, Plant and Animal Health Management and Control Systems for the Horticulture and Livestock/Meat Industry Groups	FY 2013
3	Competitive and Membership Organizational Analysis of Tree Crops Commodity Industry	FY 2013
4	An Assessment of Market Requirements for Selected Zimbabwean Horticulture Produce in Domestic and Regional Markets for the Development of Standards, Business Development Services and Training Needs for the Horticulture Commodity Industry Group	FY 2013
5	ICT Agricultural Market Information and Sustainability	FY 2013

On December 4, 2013 with Zim-ACP support, senior representatives from ZFU, ZCFU, MABC and MPPA shared and reviewed their advocacy and lobbying work, and the challenges and potential strategies for enhancing the enabling environment in Zimbabwe. They shared experiences in lobbying government, on service provision to members and the challenges ahead on implementing their action plans developed through the Leadership capacity building workshops and how other SADC agribusiness chambers have successfully operated. In light of the changed political environment with MAMID welcoming stakeholder dialogue and consultation, the leaders agreed to establish strategic coalitions in approaching the new government. All representatives expressed their interest in the recommendations of the Cost of Compliance study, and reiterated their commitment to lobbying the government on compliance regulations.

Annex 2 shows the meetings where partner organizations have effectively advocated on behalf of their Members.

To enhance partner organizations' lobbying capacity in the cotton commodity industry group, Competitiveness Impact Business Environment Reform (CIBER) hands-on capacity building sessions were conducted during the quarter. Ulrich Ernest, an international expert, imparted the skills to economists drawn from our partner organizations (ZFU, FACHIG, HPC and LMAC) and local consultants Dr Jackqeline Mutambara and Kingstone Mujeyi. The trained focal person is expected to use their understanding and skills of the CIBER tool do analysis within their organization and more importantly to champion the adoption of the findings and recommendations.

### **Organizations Providing Services to members**

Following capacity building for service provision in Q3 and Q4 of FY 2013, the various partner organizations signed MoUs with agribusiness service providers during the Quarter. Table 2.1.1 lists the MoUs signed by each farmer representative organization.

**Table 2.1.1 Services Provision MoUs Signed with Services Providers in the Quarter**

	<b>Parties Involved</b>	<b>Agreement</b>
1	ZCFU Manicaland and Muchena Community Forestry Nurseries	Provides constant, adequate supplies of high quality exotic forestry seedlings to farmers—environment management assistance. These grow faster to meet the short term needs. We will encourage them to consider Indigenous trees for long term. Each tobacco farmer to set aside half hectare for tree plantation.
2	ZCFU National and International Business Support Services	Provides fertilizers at 40 percent discount to ZCFU members
3	Manicaland Poultry Producers Association and Nutrition for Africa	Provides poultry feed to members at a negotiated discount of 12 percent. The benefits were to be realized from Q2
4	Manicaland Poultry Producers Association and Surrey Group	Surrey, an abattoir and wholesale buyer, committed to purchase live birds from MPPA members in batches of 3,000 birds at \$2.10/kg The benefits were to be realized from Q2
5	ZFU Mashonaland West and Packzone Investments	Provides technical support, product guarantee and discounts ranging from two percent to 10 percent on specified farming products to members The benefits were to be realized from Q2
6	ZCFU Mashonaland Central and CB Foods	Guarantees the purchase of 80,000 MT of maize at the end of 2013/2014 growing season at the prevailing price when crop is harvested. A stop order system will be used for repayment.
7	ZCFU Mashonaland Central and RJ Gumbo and Associates	RJ Gumbo & Associates agreed to provide legal advice on all contractual issues between the organization and contractors as well as collect debts from any client members who may default. The firm is acting as the insurer of the crop. The farmers paid \$10/ha for the legal services.
8	ZCFU Mashonaland Central and Nyiombo Investments	Provides fertilizers as a loan to the organization's members who have been contracted to grow maize. Repayment will be at harvesting. A total of 167 farmers have benefitted and this is for 300 hectares.
9	ZFU (Mashonaland East Horticulture Association) and Ngatirime Pvt. Co	Guarantees contract farming of sweet potatoes for markets in Singapore and locally. The project has started with 120 farmers benefitting.
10	ZFU and Nico Orgo	Provides fertilizer at a discount rate of 5-15% according to quantities purchased.
11	FACHIG (Muzarabani district) and	SAT donated selected equipment for expressing oil from oilseeds and processing honey and the Farmer's

	SAT	Association will provide the building for housing the equipment, security and daily management of the equipment. After 3 years the equipment will be officially handed over to the farmers association. The producers are selling the products locally.
12	FACHIG and ARDA seed company	For production of seed cowpeas and a guaranteed market at 60c per kg. 300 farmers have benefitted in the reporting period. The price is within the offered market price range. The farmers will not meet the transport costs since produce will be collected at district level.
13	DOHOPA and Selby	Provides seedlings for cherry peppers and goose berries. In the reporting period, 600 farmers received the seedlings. Market of produce is guaranteed.

Farmers are recognizing the services that their organizations are providing. In the quarter 5,770 members renewed their membership. Table 2.1.2 shows the disaggregation by organization and province.

**Table 2.1.2: Members paying subscriptions between October and December 2013**

Organization	Subscribing Members		
	Male	Female	Total
ZFU Manicaland	160	108	268
ZFU Masvingo	190	380	570
ZFU Matabeleland North	648	792	1440
ZFU Mashonaland East	790	1510	2300
ZFU Matabeleland South	412	763	1175
ZCFU Mashonaland Central	10	7	17
<b>TOTAL</b>	<b>2210</b>	<b>3560</b>	<b>5770</b>

Farmer representative organizations failed to attract reasonable membership during the reporting period. Producer associations expect members to renew their subscriptions in numbers after harvest and sale of the dry-land crop in quarter 3.

ZFU successfully launched their Agribusiness Chamber on December 12, 2013 at an event attended by over 100 delegates representing public and private sector agribusiness stakeholders. The resolution for formation of this Chamber was made by ZFU leadership at their 73rd Congress. This development follows the Zim-ACP facilitated services provision capacity building workshop through which the leaders directly networked and brokered services with agribusiness firms. The Agribusiness Chamber provides a platform for union leaders to interface with the corporate world and for the latter to have firsthand information on farmers' needs. Agribusiness Chamber members include Bankers, Micro Lending Groups, Insurers, Seed Houses, Fertilizer & Chemical companies, Commodity Trading Companies/Processors, Retailers, Agricultural Equipment Manufactures & Suppliers, line Ministries (MAMID, MOL, MOF, etc), NGOs, Donor Organizations, Commodity Producers' Associations.

## **Leadership Skills Enhanced**

Following the Zim-ACP capacity building workshops, FACHIG held feedback meetings with their members attended by 72 leaders, 78% of whom were women. The Executive Director reported that following the training there was no request for per diems or allowances by leaders as was the case in the past.

## **Websites and Databases Developed**

The STTA for website development was completed this quarter and provided ZFU, ZCFU, and FACHIG with training manuals on editing articles, evaluating content, and uploading photos to their websites as part of the pilot program (Annex 3). Zim-ACP put in place a system to track the number of people who have visited the websites and what they viewed. We will track this data and report end of quarter two.

During the Quarter, databases for FACHIG, ZFU and ZCFU were uploaded. For ZFU, work started on transferring 80,000 records from the old database to the new database. They started to populate the database with details of members renewing or paying their subscriptions. However, this was slowed as the unions have not yet updated their data at District and Provincial levels. Databases for FACHIG and ZCFU Mashonaland Central have been installed, are functional and the focal persons for updating have been trained.

### **2.1.2 Strengthening CIG Agribusiness Representative Bodies for Advocacy, Lobbying and Service Provision**

#### **LIVESTOCK**

##### **Small Scale Rural, Peri Urban and Urban Broiler production Study**

Zim-ACP completed a study this quarter on broiler chicken production. From information gathered on broiler slaughters from abattoirs and day-old chick (DOC) production between January 2009 and November 2012, there is evidence that the small to medium scale broiler producers are the dominant broiler meat producing sectors. They are also the sectors that have achieved sustained growth over the same period. Whereas the large scale sector grew five-fold from 390 MT to 2100 MT per month between January and September 2010, it has remained relatively static at 2000 MT since then. The growth in chicken production in the small to medium scale sectors has however remained strong throughout. From a low of 654 MT in 2009, they grew by 286% in 2009, 39% in 2010, 23% in 2011 and 27% in 2012.

The results were shared with stakeholders at the SADC Poultry Liaison Forum held on December 12, 2013. The report (attached as Annex 4) showed that on average 35,000 smallholder farmers (less than 500 broilers) are in production at any given time around the country. 60 percent of these producers are women. This group of farmers accounts for 52% of day old chick sales sold in the country each year.

The study is the first concrete evidence of the importance of the smallholders in the broiler value chain. As a result of the study it is now feasible for the poultry sector to more accurately attribute impacts of policy on the smallholder sector, a key constituent in livestock policy. ZPA adopted two key recommendations. One is increased training in improved feed management practices to reduce wastages and improve daily weight for the birds to be market ready at around six weeks instead of eight weeks. The second was to institute a food safety and quality assurance scheme that is uniform for the industry. Members of the ZPA were encouraged by the study and have decided to fund a similar study, starting in Q2, of the smallholder table egg production sector. Again the active participation of members of the ZPA in data gathering indicates strengthening of ZPA to independently undertake research for evidence-based policy advocacy post Zim-ACP interventions.

LMAC and the poultry industry will use the findings to improve services to small-scale producers to boost productivity of the sector as part of an industry competitiveness strategy. LMAC forwarded the findings to Agricultural Marketing Authority (AMA) and DLVS inform that any increase in levies such as abattoirs inspection and services fees in the sector impact largely women who make up 60% of the small-scale or informal producers. The study findings suggests that DLVS's services for disease control and management, e.g. for Newcastle disease outbreaks should also be focused at urban and smallholder producers.

### **Livestock Policy Development**

In September 2013 a meeting was convened by the DLVS and the AU-IBAR to introduce the VETGOV program being funded by the EU Africa-wide. A key facet of the program is the establishment of Livestock Policy Hubs (LPH) in participating countries. The Hubs are private-public sector dialogue forums to discuss livestock policy and make recommendations to policy makers. It was proposed that Zimbabwe set up a Livestock Policy Hub to help develop a livestock policy and to come up with national livestock development strategy. The LMAC decided that such a forum would make it easier to address most issues of concern to the industry identified in the CIBER studies, the draft Livestock Competitiveness Strategy, the Cost of Compliance Study, Cost and Benefits of Imported Live Cattle from Botswana, among others. The September 2013 meeting nominated the Principal Director of the Department of Livestock and Veterinary Services as the chair of the Hub and the Livestock and Meat Advisory Council, in recognition of its role as the champion of private livestock sector stakeholders, was nominated the deputy chair.

On December 16, 2013 a meeting of livestock value chain stakeholders sponsored by the VETGOV program was convened to launch the LPH. This was followed on December 19, 2013 by a planning meeting to draft a work plan and come up with a budget for the first 6 months of the LPH. In his opening remarks at the Launch on December 16, 2013, the Secretary for MAMID lauded LMAC for its positive role in lobbying the government to review agricultural policy and, in particular, legislation which hinders competitiveness in the Livestock and Meat Commodity Industry Group. This is a significant development and achievement for LMAC through USAID/Zim-ACP technical assistance, given that at Zim-ACP's onset the Ministry did not accept LMAC as a legitimate representative of the livestock stakeholders. The LPH, which is in tandem with the Zim-ASSET program and the CAADP Compact process, provides opportunity for LMAC and its affiliated associations (Zimbabwe Poultry Association, Pig Producers' Association of Zimbabwe, Stockfeed Manufacturers' Association, Abattoirs' Association, Cattle Auctioneers' Association, as well as the Zimbabwe Association of Dairy Farmers) to influence the development of policy in the livestock sector.

LMAC Position Paper on Livestock Policy and Strategies (attached as Annex 5) was completed in late December 2013 and following approval by LMAC was forwarded to the LPH leadership in January 2014. The acceptance of LMAC to be deputy chair of the LPH is a welcome development in the recognition of a LMAC as a legitimate representative body of private sector stakeholders for the Livestock and Meat CIG. It is anticipated that the private sector will be using the opportunity to influence the design and implementation of policy favorable for improved competitiveness of the CIG.

### **Study on Sources of Non-Competitiveness of Local Mono-gastric Feeds Manufacture Relative to Zambia and South African Feed Industries**

The recent increase in complete feed imports for pig and poultry sectors from Zambia as well as increased interest shown by South African feed firms to engage distributors of feed in Zimbabwe shows that the country is non-competitive relative to the two countries. The Stockfeed Manufacturers Association of Zimbabwe (SMA) resolved to fund a study to gather evidence to guide policy towards the development of a competitive feeds and livestock sector in Zimbabwe.

The study is currently undergoing review and will be published in January 2014. The results of the study will become part of the LMAC Livestock Competitiveness Strategy and the stakeholder issues paper on the national livestock policy. That the SMA is willing to fund the study from its own resources is a key outcome of Zim-ACP interventions which has demonstrated the importance of evidence-based policy advocacy.

### **Livestock Competitiveness Strategy**

The idea of formulation of livestock competitiveness strategy (LCS) gained momentum at the July 12, 2012 Agricultural Competitiveness Conference convened by Zim-ACP at the Cerebration Centre, Harare. Following the CIBER studies in the livestock value chains it was suggested that the next logical step was to incorporate the findings into a stakeholder collaborative action strategy. A draft document has been compiled and has been shared with stakeholders at various fora.

The draft LCS includes proposed private sector supported initiatives for improving productivity by linking smallholder producers to established large producers who will be offering technical advice. ZPA, AAZ, and PPAZ are already implementing some of these initiatives. For example PPAZ and Pig Industry Board are forming a joint venture program to supply improved pig breeding genetic to smallholder pig producers. The AAZ members accepted to fund a livestock development officer to coordinate private sector initiatives in productivity improvements. LMAC Board of Trustees agreed to resuscitate the Livestock Identification and Traceability System (LITS);

### **Other Advocacy Work**

LMAC effectively organized or participated in meetings in which it made presentations on the state of the Livestock and Meat CIG, challenges faced and advocated for policy and regulatory reviews to improve the sector competitiveness as follows:

- (i) At a meeting held with the Department of Livestock and Veterinary Services (DLVS) and Economics and Markets (MAMID), LMAC and representatives from the chicken and pork value chains raised health and SPS concerns over the increase in the importation and retailing of Mechanically Deboned Meat (MDM) and other meat products. MDM is a raw material in sausage making. It is an unstable product that can develop high microbial content if the cold chain is not maintained as is the case particularly when divided into smaller blocks retailed in both formal and informal meat markets. LMAC's statistics on the large quantities persuaded DLVS to increase its surveillance, inspections and registration of entities wishing to import MDM which should be for processing purposes and not retailed. MAMID is considering an LMAC recommendation to review the duty on MDM as it is a raw material in meat processing, and the duty should be reduced from 10 percent to 5 percent in 2014 to make it affordable for processing and reduce incentives for retailing.
- (ii) Mr. Solomon Zawe, the LMAC Chairman, participated at the first Public-Private Sector Dialogue Breakfast Meeting hosted by Alpha Media Holdings and the Open Society Initiative for Southern Africa. The aim was to provide a platform for cabinet ministers, business leaders, civic society and academia to dialogue on challenges and strategies for promoting economic growth in Zimbabwe. The panelists for the first discussion session were Dr. Obert Mpofu – the Minister of Transport, Communication and Infrastructural Development, Mr. Patrick Chinamasa – the Minister of Finance and Dr. Joseph Made – the Minister of Agriculture, Mechanization and Irrigation Development. The LMAC Chairman raised industry concerns on the cost of regulatory compliance, weakness in border control resulting in smuggling of meat products into the country and poor rural infrastructure as some of the factors inhibiting competitiveness of Zimbabwe agricultural produce relative to imported produce. MAMID Minister acknowledged the challenges and encouraged public-private dialogue to improve the sector. He reiterated his request for the private sector to proffer solutions addressing the challenges. The Minister accepted the proposal that MAMID should base its policy interventions on evidence generated from objective analysis.

- (iii) Recognized by MAMID as the private sector voice for the livestock value chain through their work on the livestock competitiveness strategy, MAMID representatives met LMAC for inputs on the crafting of the National Contract Farming Framework (NCF) for Zimbabwe. LMAC provided the following feedback in support contract farming: 1. identified side-marketing as a major constraint to contract farming; 2) recommended reducing financing costs; 3) identified the potential for contracting for short cycle production processes such as poultry, cattle feedlotting and pig weaner finishing operations; 4) recommended the Ministry look at insurance companies operations to ensure farmers are protected; 5) recommended government oversight to ensure adequate input provisions from contractors; and 6) recommended a spot market to provide price reference for contracted crops. Recommended that the Contract Framework should be very clear on the price discovery mechanism advocated.
- (iv) As LMAC's role in the livestock sector is increasingly getting recognized by regional Private Companies. Representatives from Parmalat, a South African dairy processing firm, met with LMAC and the Zimbabwe Association of Dairy Farmers (ZADF) seeking LMAC's advice on investment in Zimbabwe's Dairy Sector. Parmalat was exploring investment opportunities in the Zimbabwe dairy industry. ZADF provided an overview of dairy production in Zimbabwe as well as institutions supporting the development of the sector including ZADF, ZDIT and the Dairy Partners Forum. ZADF also outlined the program to promote milk consumption by school children.
- (v) In October 2013 the EU Delegation in Harare invited LMAC to identify areas of possible assistance to the livestock sector. LMAC submitted the following:
- a) resuscitation of the Livestock Identification and Traceability System (LITS.) This is important for meeting food safety and traceability requirement for accessing regional and international markets;
  - b) development of Good Agricultural Practices and implementation of brand marketing strategies in the poultry, pork and dairy sectors. This is a marketing strategy for competitiveness in existing and new markets
  - c) development and implementation of Good Manufacturing Standards in the stock feeds industry. This is needed to assure livestock producers that the animal feed meeting food safety and traceability requirements in food and meat product markets;
  - d) measures to control Foot and Mouth Disease (FMD) whose outbreak trigger livestock and meat product importing countries to ban imports for the affected zones and even the whole country.
  - e) measures to control New Castle disease in non-commercial poultry flock. New Castle disease outbreak lead to massive death of flocks and prohibition of marketing poultry and poultry products from affected zones and countries.

The EU accepted LMAC proposal with the funding to be provided in the first quarter of 2014.

### **LMAC Organizational Sustainability Strategy**

On November 29, 2013 LMAC convened a meeting of leadership of associations that fall under its administration including ZPA, PPAZ, SMA and ZAA, as well as CEO's of major livestock value chain firms to discuss sustainable funding models for the LMAC and its member associations. Since its partnership with the USAID/Zim-ACP, LMAC and its member associations have developed a broad range of support services for their stakeholders including policy research, policy position papers as well as information collection, collation and dissemination. There was general agreement that these services

have contributed to the LMAC's recognition as the main voice for the livestock industry effectively engaging counterpart institutions within the public sector in the development of livestock policies and strategies for the country. The recognition culminated in the LMAC being given the vice-chairmanship of the Livestock Policy Hub, a public-private sector forum for debating livestock policies. As part of its strategy for organizational strengthening and effectiveness for lobbying and services provision LMAC developed a budget to employ a public relations officer/ junior economist, the employment of a livestock development officer, as well as an association secretary. The Public Relations Officer will attend meetings, assist the Senior Economist, assume administrative duties and maintain the website. The Association Secretary will organize meetings, record minutes, follow-up on actions that arise, manage Association correspondence, update the membership database, and follow-up on debtors. There has also been substantial discussion on enhancing livestock development. The Livestock Development Officer will compile a summary of the status of livestock development activities across the country and spearhead the coordination of extension and training in partnership with the public sector. While LMAC and member associations agreed to contribute to a fund to accommodate these post in addition to that of a substantive Senior Economist commencing in July 2014, Zim-ACP advising LMAC to re-look at whether it will be able to sustain such an expansion.

## **HORTICULTURE**

During the reporting period, HPC consulted stakeholders on the horticulture competitiveness strategy. HPC met a total of 470 (153 male, 31 female) smallholder horticulture producers in 6 meetings organized by the ZFU Horticulture Commodity Associations. The smallholder horticulture producers prioritized provision of (i) up-to-date regular information on market prices and trends, (ii) up-to-date horticulture extension advice particularly on marketing. The development of industry-wide accepted quality standards and a code of conduct for out-grower arrangements and marketing of produce were prioritized as these would eliminate unfair practices in accessing markets. This entails all stakeholders agreeing and abiding by the code of practices.

Twenty-one people (4 female, 17 male) representing lead horticulture wholesalers, retailers, services providers and producers attended the Horticulture CIG champions' meeting held on October 23, 2013 that reviewed the second draft of the horticulture competitiveness strategy. The stakeholders agreed that a private sector body, such as the HPC, was best placed to coordinate the private sector roles in the implementation of the competitiveness strategy instead of a public sector body, such as the Horticulture Development Authority being suggested by MAMID to be responsible for the development of the horticulture industry.

HPC presented a paper on 'Horticulture farming and marketing challenges, and the role of AMA' on October 24, 2013 at the AMA Stakeholder and Consultative Workshop attached as Annex 6. The presentation informed the participants on constraints to competitiveness in the CIG, HPC work on the horticulture competitiveness strategy, and quality standards development. The meeting agreed with HPC's proposal for the industry to adopt the LocalGAP standard based on GLOBALGAP.

HPC has been on a drive to improve membership by recruiting smallholder commodity associations. During the reporting period, they assisted ZFU Mashonaland East Horticulture Commodity Association in linking their farmer members with potential buyers of horticultural produce in Goromonzi, Chivhu, Murehwa, Seke and Hwedza. Buyers included Ariston Holdings, Ngatirimei Agri Experts, KENTERM and Fresh Trade companies. The buyers introduced their programs to the farmers and how they wish to work with the farmers throughout the growing season and guarantee them a market. Farmers welcomed the programs and were willing to organize themselves into groups in order to benefit from economies of scale, but raised concerns that in the past some contracting firms failed to collect produce with some changing the terms during the course of production. It envisaged that the proposed code of practice dissuade such conduct.

HPC was identified as a key contributor to the Scientific and Industrial Development Research Centre (SIRDC) study on beverages and food agro processing value chain commissioned by ZEPARU. HPC

provided SIRDC with the Horticulture CIBER Assessment Report that outlines the challenges facing the industry. HPC also provided SIRDC with information on the vision for the horticulture competitiveness strategy to integrate smallholder horticulture growers in high value markets through quality standards development and provision of market information services. The study findings, to be released in early 2014, will be packaged into a policy document to be presented to the Ministry of Industry and Commerce.

The MAMID consulted HPC on the proposed National Contract Farming Framework (NCFF). As horticulture production is mainly through contract arrangements, HPC recommended the following:

- Buyers provide required training for farmers;
- Commodity Associations assist in supervising contract arrangements for their members;
- Levies provided for by the Farm License and Levies Act to be used to strengthen commodity associations;

On December 19, 2013, the Fresh Produce Marketers Association of Zimbabwe (FPMAZ), a HPC association, and the Mbare Musika Apple Traders Association (MMATA), requested HPC's assistance to draft a position paper on apple and onion imports and surtaxes. Demand is estimated at about 30,000 metric tons of apples while local production is around 7,000 metric tons. Both FPMAZ and MMATA allege that due to the lack of transparency in the import permits process, apples in excess of the 30,000 are being imported resulting in over supply. Currently, a 25% surtax meant to discourage imports is applied even when there is no local produce on the market. Formal traders pay the full surtax. However, it is alleged that informal or unlicensed traders avoid the surtax and other costs by under invoicing sales. Further allegation are that much of the apples imported by the informal traders for sale at Mbare Musika would be third grade or even rejects not allowed for sale within South Africa. FPMAZ and MMATA proposed that surtax payments be required only between February to July when locally produced apples are harvested and on the market. FPMAZ and MMATA want MAMID to provide tighter oversight on the issuing of import permits and stricter quality standards checks, at border, on South African produce. The Fresh Produce Marketers Association of Zimbabwe and Nyanga Deciduous Fruit Growers Association endorsed the proposals at meeting in Nyanga on December 5, 2013 attended by 23 participants (2 female, 21 male). The HPC position paper is attached as Annex 7.

### 2.1.3. REGULATORY REVIEW AND REFORM

During this quarter, Zim-ACP received requests for technical assistance to generate evidence for advocacy for regulatory review. Annex 8 gives detail of the regulations reviewed in the quarter and future work to be done. Table 2.1.3 lists the regulations reviewed in the quarter.

**Table 2.1.3: Regulation/ Policy/ Administrative Procedure reviewed in the quarter**

	<b>Regulation/ Policy/ Administrative Procedure</b>
1	Environmental Management (Hazardous Substances, Pesticides and Other Toxic Substances) Regulations, 2011
2	Environmental Management (Atmospheric Pollution Control) Regulations, 2009
3	Environmental Management (Hazardous Substances, Pesticides and Other Toxic Substances), 2009
4	Environmental Management (Hazardous Waste Management) Regulations, 2007
5	Environmental Management (Environmental Impact Assessment and Ecosystems Protection) Regulations, 2007
6	Environmental Management (Effluent and Solid Waste Disposal) Regulations, 2007
7	Agricultural Marketing Authority Statutory Instrument 140 of 2013
8	Regulation on Mechanically Deboned Meat imports
9	National Contract Farming Framework (NCFF) and SI 142 of 2013

### Cost of Compliance with Regulations in the Sector

There has been an increase in new regulatory requirements in the livestock value chain which is having significant impact on cost of doing business. LMAC and its member associations have campaigned against individual elements of these new regulations with mixed degrees of success. The cost of compliance study undertaken by LMAC with the support of Zim-ACP that costs of complying with regulations on the beef, dairy, poultry and pig value chains have negative impact on viability and competitiveness of the industry. It shows the cost of compliance to be:

- \$112 per beef animal slaughtered;
- \$0.06 per liter of milk produced;\$0.08 per broiler produced in the large scale sector and \$0.22 per broiler produced in the small scale sector;
- \$0.05 and \$0.14, respectively, per 30-egg tray produced in the large-scale and small scale sectors; and
- \$10 and \$17, respectively, per pig produced in the large-scale and small scale sectors.

Of major concern is the higher impact of the regulations on the small scale production sectors which has negative implications for economic empowerment and poverty alleviation.

In addition to informing the development of the draft LMAC Livestock Competitiveness Strategy, the results of the cost of compliance study were tabled at two key meetings helping further understanding between the public and private sectors:

- a) LMAC and chairs of its member associations discussed concerns about regulatory burdens at a meeting with the Deputy Minister for Livestock in MAMID. It was agreed that the private sector needs to consolidate their concerns in position papers and work with the Livestock Policy Hub to assist with development of livestock policies and strategies. MAMID lauded LMAC as a Partner for Public-Private Sector Dialogue and acknowledged the levy issues and requested private sector ideas to ensure fairness on levies.
- b) Zimbabwe Herd Book Beef School met on October 23, 2013. This was motivated by the need for beef producers to form an association to spearhead advocacy on behalf of farmers. This led to participants at the Beef School to launch the Red Meat Forum which will be administered by LMAC. The forum will be an apex platform bringing on all representative bodies and individuals with interest in red meat (cattle, goats, sheet) to share perspectives on issues affecting their value chain and agree on strategies for addressing policy issues and the development of the industry.

With the conclusion of the Cost of Compliance study, LMAC, with Zim-ACP support embarked on sensitizing regulatory agencies to the findings and to garner buy-in for legislative recommendations as described below:

- (i) LMAC presented a summary of the Cost of Compliance Study to one of the key regulators, Environmental Management Agency (EMA), on November 8, 2013. EMA has the most multiple charges faced by beef, poultry, and pig farmers, and by processors at abattoirs levels. The stakeholders consider the charges and fines for effluent discharge as derived from countries in Europe where the water tables are high. Dairy operators are charged for discharging boiling water, emissions of steam and fumes from boilers. The stakeholders want to engage EMA for a review of these effluent levels in accordance to local conditions.

- (ii) It often takes three trips to make one single payment of fees for testing water and effluence as the office where payment is made is at another location from where the EMA laboratories are located. The level of fines for non-compliance (level fourteen) which attract a fine of \$5,000 are the highest of all fines compared to other regulations. Stakeholders want dialogue on the fee structure and charges and for EMA to work with farmers on education and mitigation strategies instead of EMA's inclination toward punitive measures. Charges, fees and fines should be based on the size and type of operation instead of being blanket charges. EMA welcomed the findings indicating this was the first time evidence has been brought up on the cumulative impacts of cost of regulations. EMA committed its high level staff to represent it at LMAC meetings henceforth. This was a landmark breakthrough for LMAC who have unsuccessfully lobbied for EMA representation at their meetings for the past three years.
- (iii) On November 21, 2013, 34 males and 16 females attended the Matabeleland Agribusiness Chamber (MABC) stakeholder consultation feedback meeting on the overall findings and recommendations of the Cost of Regulatory Compliance Study. The stakeholders representing ZFU, ZCFU, Pig Producers, Cattle farmers, Abattoirs, Department of Livestock and Veterinary Services, SNV validated and endorsed the findings and recommendations. The stakeholders requested that bank charges on cash transactions at livestock auctions be added to the final cost to the farmers. Stakeholder consultations should include consumer representatives as they are affected by the cost buildup within the value chain just like the producers. It was agreed that, as in South Africa, government should apportion part of levies for the development of the respective value chains, to include training and market development, especially for cattle from the Matabeleland Provinces.

The Registrar for Fertilizer, Farm Feeds and Remedies in the DR&SS (Department of Research and Specialist Services) adopted and incorporated some of the proposed changes contained in the White Paper for the reviewing of the Fertilizer, Farm Feeds and Remedies Act submitted to MAMID. The adopted amendments pertain to updating the registration of both locally produced and imported animal feeds to improve feed safety and quality. At its meeting on October 31, 2013 the Stockfeed Manufacturers' Association (SMA) accepted the amendments as accommodating their concerns captured in the White Papers. The Registrar was to submit the amendments for legislative decree by the Minister of MAMID through publication in the Government Gazette. This would be the first step in the implementation of recommendations in the white paper and evidence of Government's adoption of the private sector driven advocacy. The remaining three broad topics to be amended through the Act of Parliament are (i) re-organization of the Act to achieve clearer objectives; (ii) establishment of rights, responsibilities, powers and duties according to international best practices; and (iii) creation of better penalties for deterrence of non-compliance.

### **Agricultural Marketing Authority Statutory Instrument 140 of 2013**

On September 23, 2013 the Government gazetted Statutory Instrument (SI) 140 of 2013 under the Agricultural Marketing Authority (AMA) Act. The stated objectives of SI 140 are to

- a) regulate the participation in the production, buying or processing of any grain, oilseeds and products by producers, buyers or processors;
- b) promote orderly marketing and fair trade practices in the grain and oilseeds industry;
- c) promote production of grain and oilseeds, including contract farming; and
- d) provide a mechanism for enforcement of contractual obligations to protect the investment of farmers, contractors and suppliers.

The measure requires farmers, buyers and traders of grains and legumes to register and pay fees to the AMA. The measure affects the livestock sector through increasing the cost of doing business in the Stockfeed value chain, a major cost driver in the production of livestock products. The LMAC is concerned about the implications of the regulatory measure on cost of production for its stakeholders.

Zim-ACP drafted a position paper (attached as Annex 9) in response to the SI 140 of 2013 which highlighted the negative impacts the new regulation will have on stockfeeds processors, grain and legume farmers, and informal traders. These include the following points:

- In the statutory instrument there is no mention of AMA SI 147 of 2012. Processors are required to register under SI 147 for a fee of \$500 per year and as in SI 140 are required to submit returns on their trading activities. It is not clear whether the new SI will replace SI 147 or will be in addition to it. If the latter is true then this will be duplication and will mean processors will have to pay \$1500 or triple the burden under SI 147 for pretty much the same regulation;
- Most of the small grains (rapoko, munga), nyimo and cowpeas are not traded under contract arrangements. These are usually traded by informal traders who buy a few bags at a time. The \$1000 buyer registration fee would effectively stop trade in these commodities to the detriment of poor farmers who are mostly from the drier areas of the country;
- It is not clear from the SI whether farmers have to register as a grower for each commodity separately;
- Given that even in the best seasons during the 1980's smallholder farmers who produced surplus maize that was marketed were less than 20% of all smallholder producers, making all farmers register and pay the \$1 as growers would be unfair;
- Finally, in terms of section 39 of the AMA Act, there is need for prior consultation with affected classes of persons before imposition of a levy. Processors who are required to be registered under the FFR Act as well as the Companies Act will have to pay a \$1000 dollars registration "fees or levies", without being given opportunity to make representations. The financial burden of requiring a processor that has registered and paid fees to another body within the same Ministry to pay fees over a similar registration is unreasonable and grossly unfair.

LMAC's position as outlined in the preceding sections of this report were presented to a team from the Economics and Markets Department in the MAMID who were tasked with coming up with a framework for promoting contract farming. The results of the consultations by this task team are due in January 2014.

## **2.2 COMPONENT 2: IMPROVING MARKET FACILITATION INSTITUTIONS**

### **2.2.1 Quality Standards**

With Zim-ACP support, HPC was accepted as a GLOBALGAP member for 2013 and 2014. Membership commits HPC's members to respond to consumer concerns on food safety, animal welfare, environmental protection and worker safety. HPC adopted the LocalGAP standards for Fruits and Vegetables, a subset of the GlobalGAP. The LocalGAP is a capacity building program, in which enrolled producers will be

assisted through regular and guided assessment by Farm Assurers to comply with GlobalGAP standards and eventually achieve certification. Horticulture producers on the program increase their chances for being contracted to supply buyers demanding compliance with standards related to food safety, animal welfare and legal issues. Thus the adoption of LocalGAP serves to integrate smallholder horticulture producers into the high value markets, both locally and in the SADC region. HPC will access GlobalGAP technical resources to train Farm Assurers who are responsible for working with and assessing farmers implementing the LocalGAP.

HPC will collaborate with growers' associations, SAZ, key industry firms sourcing produce from smallholder growers, buyers (wholesalers and retailers) and consumers as the demand for quality standards is a key success factor.

### **2.2.2 ICT-based Market Information Systems**

During the course of the Quarter, HPC and LMAC circulated two monthly market updates to 200 and 350 industry stakeholders, respectively, including producers, retailers, wholesalers, exporters, researchers, academics and selected government departments.

## **CHAPTER III: MONITORING & EVALUATIONS**

### **ACTIVITIES**

#### **3.1 ACTIVITIES UNDER M&E**

Monitoring and Evaluation (M&E) efforts on Zim-ACP ensure that program activities and results are tracked and reported to management and USAID/Zimbabwe in a timely, verifiable manner for their input and guidance. Zim-ACP M&E data is entered in TAMIS, a user-friendly, automated information management system that provides structure for organizing, planning and sharing. TAMIS houses all program performance data and facilitates reporting on program indicators.

##### **3.1.1 Monitoring Program Events**

All program events organized by Zim-ACP during the reporting period were monitored. These events included stakeholder consultation forums, meetings, workshops and training sessions. Monitoring ensures that an attendance register is completed by all event participants and an evaluation questionnaire is applied as needed. An attendance register captures details of participants such as name, sex, organization and contact details. This record allows for tracking of the number and type of stakeholders participating. Analysis of this record allows program management to take corrective action when some key groups or sectors (women, small scale producers, industry representatives etc.) are underrepresented from events. Table 3.1.1 shows the workshops and meetings organized by Zim-ACP during the reporting period.

**Table 3.1.1: Workshops/Meetings facilitated by Zim-ACP**

Date	Workshop/ Meeting Title	Attendance			Average Rating (percent)
		Male	Female	Total	
November 13, 2013	Matabeleland Stakeholder Consultative Meeting on Cost of Compliance with regulations Study Findings	34	16	50	88.5
November 21, 2013	Manicaland Stakeholder Consultative Meeting on Cost of Compliance with regulations Study Findings	43	9	52	90.1
November 11 to 15, 2013	Cotton CIBER Hands-on Capacity Building Sessions	3	6	9	*
December 12, 2013	ZFU Services Provision Follow-up and Mentorship	9	3	12	*

NB

\*Means no evaluation of workshop was done.

An evaluation questionnaire is administered to get feedback from participants on the content, organisation and facilitation of the event. Data from the evaluation questionnaires is collated and used to produce an evaluation report for management feedback on the success or otherwise, of the event as well as for planning future events.

### 3.1.2 Evaluation Studies

#### Adoption of learned management practices

An assessment was conducted to establish the number of supported producer organizations applying learned management practices during the reporting period. Ten farmer unions; commodity and agribusiness associations trained in lobbying and advocacy, leadership and governance, services provision, gender mainstreaming and market analysis and voluntary standards, were assessed. Six farmers unions and commodity associations (ZFU, ZCFU, DOHOPA, FACHIG, MPPA and ZWPFT), and two agribusiness associations (LMAC and HPC) applied at least one of the learned management practices as explained in the Component 1 section. The others have done activities that we cannot directly attribute to our efforts as Zim-ACP. However we anticipate some adoption in the coming quarters.

#### Impact studies

The impact of the program is assessed in terms of long-term changes at the producer organizations as well as at the business enterprise level. The logic is that when producer organizations and business enterprises benefit from improved and relevant services provision as well as an improved regulatory environment and market systems, long-term positive changes will occur in terms of:

- Increased profitability of business enterprises and improved financial performance of producer organizations (ability to cover their operating costs); and
- Ability of producer organizations and business enterprises to leverage resources through partnerships.

### **Profitability**

Zim-ACP has a FY 2014 target of 4 supported producer organizations operating more profitably (at or above cost) because of USG assistance. For the reporting period, profitability was assessed on the 10 producer organizations (ZFU, ZCFU, FACHIG, ZWPFT, LMAC, HPC, DOHOPA, MAPA, MABC and MPPA) that received capacity strengthening from Zim-ACP. Assessment of profitability of producer organizations is conducted as part of a broad organizational capacity assessment covering issues of leadership and governance, service delivery, lobbying and advocacy, gender and environment integration.

Organizational Capacity Assessment Tool is used to assess the organizations at the end of each fiscal year. A ranking tool with scores ranging from zero to four is used to summarize capacity of the organization in a particular area. Zero mean the element is non-existent and four that components and elements are fully operational and demonstrating signs of sustainability and evolution.

During the quarter interviews with key informants of the partner organizations were done to assess any change in the profitability of organizations compared to the previous quarter. All the assessed organizations indicated that while they benefitted immensely from capacity building by Zim-ACP in areas of website development, hand holding on linkage with service providers, training on leadership and governance, lobbying and advocacy, gender and environmental mainstreaming; they were still operating below the level of operational self-sufficiency. (Operational self-sufficiency is defined as the margin, positive or negative, of recurring revenues above/below operating expenses (salaries, rent, utilities, supplies, and all consumables).

Despite the challenges, LMAC has successfully taken over the payment of the Program and Stakeholder Support Assistant (Vimbai Chigavazira) at the expiry of her contract with Zim-ACP on December 31, 2013. The payment of the Program Stakeholder Support Assistant was a Zim-ACP responsibility because of the signed MOU that we have with LMAC. There was a plan for LMAC to take over payment after a year. LMAC has offered Vimbai initially a six months contract while waiting for LMAC and LIT (Livestock Identification Trust) to decide on the proposed budget for 2014. At the meeting held on December 13, 2013, LMAC Executive Council agreed on the need to revise the monthly subscriptions from stakeholders to ensure that LMAC has adequate staffing capacity to maintain and enhance its services. A subscription system based on levels of production of stakeholders was tabled and after discussion, it was agreed that the Administrator draw up a more comprehensive financial proposal for consideration by members in January 2014.

### **Value of Resources Leveraged Through Partnerships**

During the reporting period Zim-ACP tracked the resources leveraged by partner organisations and supported business enterprises through relationships with agribusinesses, agribusiness service providers, NGOs etc. This is a project impact indicator looking at the ability of a producer organization to attract resources (credit or grant) as a result of working with Zim-ACP. The data for this indicator was collected from the 10 producer organizations that Zim-ACP is working with, (ZFU, ZCFU, FACHIG, ZWPFT, LMAC, HPC, DOHOPA, MAPA, MABC and MPPA). None of the organizations reported to have leveraged any resources during the reporting period.

## CHAPTER IV: ENVIRONMENTAL ISSUES

The Zim-ACP Environmental Mitigation and Monitoring Plan identified activities on policy and regulatory review as requiring mitigation measures to minimize adverse impacts on the environment. Environmental mitigation measures agreed for Zim-ACP include:

- Creating awareness on environmental issues among producer organization leadership and management including environmental management obligations under Zimbabwean law
- Ensuring that consultants engaged to conduct research and analysis of proposed regulatory reforms include an analysis of the possible environmental effects and recommendations to mitigate these impacts

### **Environmental work in partner organizations**

Due to awareness raised during Zim-ACP facilitated capacity building workshops on environmental management, ZCFU Manicaland went on to sign MoUs with Muchena Community Forestry Nurseries. This is for provision of constant and adequate supplies of high quality exotic forestry seedlings to farmers. The move is to improve environmental management by having enough exotic wood grown in mainly tobacco farming areas for fuel to cure tobacco.

HPC has been approved to be a member of GlobalGAP and is on course towards adoption of LocalGAP quality standards for the horticulture commodity industry group. The standards will, among other components, promote best environmental management practices to be adopted by farmers in production of the crops.

In FY 2014 Zim-ACP will continue to encourage partner organizations to adopt best practices in environmental management.

## CHAPTER V: GENDER ISSUES

Zim-ACP aims to mainstream gender through ensuring that both males and females participate in program activities, their voices are heard, and their concerns are taken on board in the regulatory reform processes, in assessment and development of needed market institutions/systems, and in training and capacity building activities. Zim-ACP's objective is to build the capacity of partner organizations to strive towards gender equality and female empowerment as they work towards building a competitive agriculture private sector. Zim-ACP recognizes gender equality as a fundamental human right and key to effective and sustainable economic development.

### **Partner organizations mainstreaming gender**

Following capacity building on gender mainstreaming, FACHIG requested for technical assistance in the development of a gender policy for their organization. Dr. Chingarande, the gender consultant assisted FACHIG to go through the process of conducting a gender audit and developing a gender policy. Annex 10 is the FACHIG gender policy.

Due to the fact that all producer organizations clearly pointed out that women had a challenge of low self-esteem and lack of confidence in themselves and in fellow women, as a follow up activity, the consultant developed a manual to unleash the power within women for leadership. The manual, entitled 'Unleashing the Power Within: A Manual for Women Empowerment', is attached as Annex 11. This manual was designed to groom women in all producer organizations for leadership both at home and outside. The aims of this manual are to:

1. Guide participants in determining their own personal strengths and weaknesses as (potential) leaders;
2. Encourage participants to acknowledge and harness their knowledge, attitudes and skills and to move towards the actualization of their leadership potential;
3. Introduce participants to the concept of the Road towards Self Transformation which stresses the importance of self-awareness, self-acceptance, self-responsibility, and assertiveness; and
4. Expose women to various barriers to their empowerment and to recognize the power hidden in them that they need to unleash to be empowered women. For empowerment to take place, five major dimensions need to be emphasized: confidence, voice/assertion, decision making, organization/planning and vision, and ability to motivate others.

In the quarter under review, an Apex advocacy platform for women in agriculture, Zimbabwe Alliance for Women in Agriculture (ZAWA) was formed. It is a platform to consolidate efforts from a broad spectrum of women farmer representative organizations including FACHIG, ZFU, ZCFU, WASAA, WFS and ZWPFT. As women in the farmer representative organizations they saw it fit to build coalition and strengthen the voice of female farmers as they lobby and advocate for an improved enabling environment. This was born following capacity building efforts of Zim-ACP and the "Women in Agriculture" workshop co-hosted by Zim-ACP and Zim-AIED in 2013 which made them realize that challenges influencing the competitiveness of women in agriculture are common to all women farmers regardless of the organization to which they are affiliated. This is an opportunity for Zim-ACP to mentor the Women in Agriculture Forum leadership as envisaged in the FY 2014 Work Plan.

## **Gender mainstreaming in program activities**

Zim-ACP aims to contribute towards gender equality by encouraging the involvement of both men and women in the program at various levels, as participants in training courses, meetings, workshops and discussion forums; and as presenters, facilitators or researchers. Table 3.1.1 shows that on average, 28 percent of participants in workshops and meetings organized during the Quarter were women. Zim-ACP will continue making an effort to encourage the constitutional 50:50 representation of men and women in decision making.

During the reporting period, Zim-ACP ensured that policy or regulatory review included mainstreaming gender in the analysis of proposed policies or regulations. At stakeholder consultative meeting on the Cost of Compliance Study held in Bulawayo on November 21, female participation was encouraged through the facilitator so that their views could be taken not of.

In inviting men and women to participate in events, Zim-ACP worked closely with associations to ensure that they invited not only a balance of men and women to events, but knowledgeable and confident men and women who were able to articulate their constituencies' issues and were able to report back on matters discussed.

# **CHAPTER 6: LESSONS LEARNED AND CHALLENGES**

## **Lessons Learned**

Whilst building the capacity of partner organizations is an important tool, Zim-ACP has realized the need to continually mentor focal champions in making use of position papers at every chance they get so that policy makers realize the urgency of problems affecting the competitiveness of the agriculture sector. LMAC has proved to be successful during the reporting period as their efforts were finally noticed by various stakeholders at the launch of the policy hub where they were given the post of vice chairperson in an environment where dialogue was previously downplayed by policy makers. The lesson for the partner organization is that sustained pro-active advocacy and lobbying bolstered by positive attitude and approach supported by objective evidence derive successful outcomes for advocacy and lobbying. For Zim-ACP the lesson is that sustained support should be provided.

During the Quarter it became apparent that the farmers' organizations, particularly ZFU and ZCFU, were somehow apprehensive of the entry and success of MABC and MABF in advocacy and lobbying in Matabeleland and Manicaland, respectively. It was felt that as MABC and MABF are not registered as farmers' organization, they do not have the legitimacy to speak for farmers who are members of ZFU and ZCFU. It was also felt that as these were regional advocacy platforms they should not seek to have a national outlook. These sentiments have the potential to scuttle efforts to build coalitions for advocacy and lobbying. In Matabeleland, there was contestation on the advocacy role of MABC versus that of ZFU and ZCFU. This arose after MABC had successfully managed to be recognized as an advocacy platform. As both ZCFU and ZFU participate in the MABC platform, it would appear these matters arose because of lack of clear boundaries between agribusiness bodies and farmer unions. There are also no clear boundaries between the regional advocacy bodies, such as MABC and MABF and farmers' organization which a national structure such as ZCFU and ZFU. The internal discord among platform members tended to disturb the smooth functioning of MABC as an advocacy forum. As building and sustaining coalitions

are crucial its advocacy, through the leadership capacity building, MABC and MABF accepted Zim-ACP advice to have MOUs with its anticipated members so that roles are clearly outlined. Through this experience, Zim-ACP saw how the partner organizations needed to be strongly mentored to build sustainable and viable coalitions for advocacy and lobbying.

## **Challenges**

### **Operating Environment**

The uncertainty over government policies following the delay in the installation of government ministers after the July 2013 election continued into the Quarter. Partner organization became anxious over what was likely to be government's policy thrust following the ruling party's gain over two-third majority in Parliament. This stalled implementation of planned activities as partner organizations adopted a wait and see attitude. Particularly affected were advocacy and lobbying for policy and regulatory reforms pertaining to re-establishment of WRS and Commodity Exchange. The partner organizations had been anxious on they would be affected by the response of the general economy to the new government's statements on import controls, indigenization and local economic empowerment.

Reduction in the budget had entailed more consultations on this work plan which delayed its approval. As a result there has been uncertainty over undertaking the planned activities as the budget and Work Plan remained unapproved. In addition, staff anxiety over their continued engagement on the project was not conducive for planning and executing activities.

### **ZimASSET liabilities**

While the farmer unions have heard the urgency in trying to turn around the economy of Zimbabwe through the ZimASSET policy document, their response in providing position papers and policy briefs to government was rather restrained during the reporting period and not in line with the level of urgency required. Perhaps this was to studying the new political environment and efforts in trying to remain politically correct/ or a lack of confidence in the implementation of the ZimASSET strategies. Hence the unions are taking a slow but sure step not to jeopardize their chances of advocating for their farmer members. Zim-ACP will continue pressing upon the unions that as long as they produce factual and evidence-based papers they stand a better chance of advocating successfully for their member clients.

### **Vulnerabilities of the horticulture sector**

Working to bring key players in the horticulture sector together is crucial and yet challenging particularly with well to do private companies. One voice for the health of the sector is critical especially in light of the MAMID Minister's continued statements in the press on the need to form a parastatal that will spearhead the development of the smallholder farmers. HPC's challenge was bringing together the value chain actors onto a platform where they could participate together at a level acceptable to policy makers. HPC's ability to become a member of Global GAP enabled them to start interacting with the whole industry and this has been accepted by big private companies in the sector.

### **Gender imbalance**

For the majority of stakeholder consultation meetings conducted by HPC with horticultural producers, there were generally more females than males in attendance. This becomes an issue particularly when implementation comes into play as most of these women are not in leadership positions where they can influence decisions. Again the heads of households who would have been absent from the meeting would then miss out on what was discussed and may resist the adoption of certain concepts related to the competitiveness of horticulture, impeding the rate at which progress is made and specified objectives are met.

## CHAPTER 7: NETWORKING & COLLABORATION

Zim-ACP continues to interact with and look for opportunities to collaborate with other USAID and donor projects. During the Quarter, Zim-ACP supported HPC to engage Zim-AIED in the various meetings held with horticulture producers in Mashonaland East, where Zim-AIED is active.

Zim-ACP shared with the IRD Acting Country Director views and insights on agricultural policy issues and those pertaining to ZimASSET that Zim-ACP could focus on. Zim-ACP concurred with his insight that Zim-ACP partner organization should be pro-active in shaping policies and strategies for restoring national and household food and getting MAMID to adopt market-centered food grain marketing strategies through restoring the agricultural commodity exchange.

The Country Director for ZimWorks and Zim-ACP DOC held discussion on possible collaboration in some of the activities around services provision in which ZimWorks partners could be involved in. Zim-ACP provided information on active initiatives by the ZFU through their Young Farmers' Club Agri-entrepreneurship program.

Zim-ACP is confident that in the coming quarters more opportunities will be available for greater collaboration and in fact have incorporated collaboration into its exit and sustainability strategy.

# CHAPTER X: BUDGETARY



# CHAPTER XI: ANNEXES

**(Annexes are provided as separate attachments to this report)**

Annex 1: Article on Zim-ACP in ZFU 73<sup>rd</sup> Annual Congress Review and Report

Annex 2: Advocacy Meetings attended by Partner organizations

Annex 3: Web Administration User Manual

Annex 4: Presentation on Small-scale urban, peri-urban and rural broiler production Study

Annex 5: LMAC Suggested Livestock Policy Issues, Statements and Strategies

Annex 6: Presentation on Farming and Marketing challenges in horticulture and role of AMA

Annex 7: Suspension of Surtax on Onions and Apples Position Paper

Annex 8: Quarterly Regulatory Review Matrix

Annex 9: Analysis of the new AMA Statutory 140 of 2013

Annex 10: FACHIG Gender Policy

Annex 11: Women Empowerment Manual

Annex 12: FTFMS