



'Anti'-globalization revisited - Perspectives on Zimbabwe's (agricultural) trajectory

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Presentation

- Zimbabwe – From bread basket to aid dependency and the evolution of agriculture and food security (1980-2008)
- Revisiting the present discourses on Zimbabwe and the impacts of the country's land reform (2008-2011)
 - Present questions/reflections

I. Zimbabwe – From bread basket to aid dependency

2'19

Pre-independence	1980-1989	1990-2000	2000-2008	2009-2011
Policies				
<p>Strong State led</p> <ul style="list-style-type: none"> •import substitution industry •Protection •White enclave 	<p>Strong State led</p> <ul style="list-style-type: none"> •Infant industry protection •Tight controls through tariffs •Foreign exchange allocation •Growth with equity 	<p>IMF/World Bank led</p> <ul style="list-style-type: none"> •ESAP •Export Promotion •Trade Liberalisation •Financial deregulation •Export Retention Schemes •Cost Recovery WTO Agreements •Free market Ideology Liberalisation (goods and services) 	<ul style="list-style-type: none"> -State attempting to regain control -Closed economy -Ad hoc state intervention -Tight foreign exchange control regulations (initially) -Price controls Import control 	<ul style="list-style-type: none"> -Weak state attempting to liberalise markets -Dollarisation of the economy -Ad hoc interventions continue
Dual land structure	Willing buyer-willing seller Land reform (2.4M ha)	Compulsory land acquisition (1.1M ha)	FTLRP	FTLRP continues
State of the Economy				
Strong/vibrant	Strong/vibrant	Gradual disintegration/de-industrialisation/de-agriculturalisation	Collapsing	Slow recovery

I. Zimbabwe – From bread basket to aid dependency

7'26

A country (formerly) in transition

- GDP: US\$ 7.100M

-Growth rate: average +5%

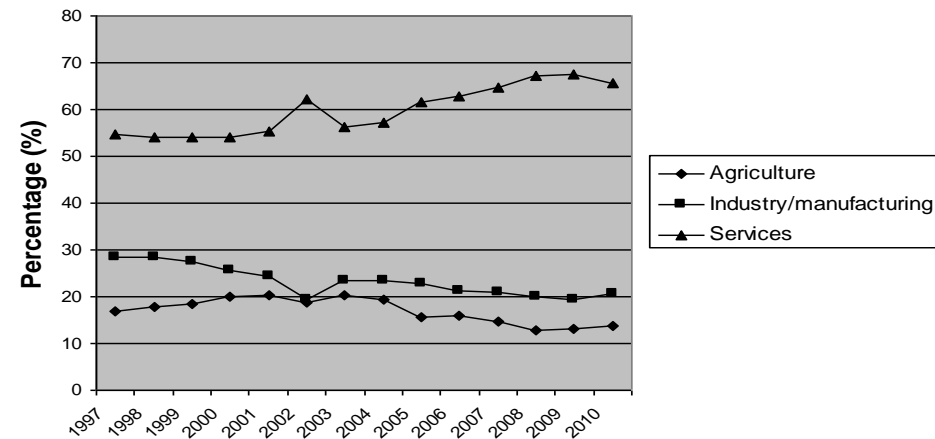
-Agriculture representing -20%

-70% pop linked to agriculture

-30% of formal employment

-Main export sector

GDP - Percentage Contribution by Major Sectors



But dual...

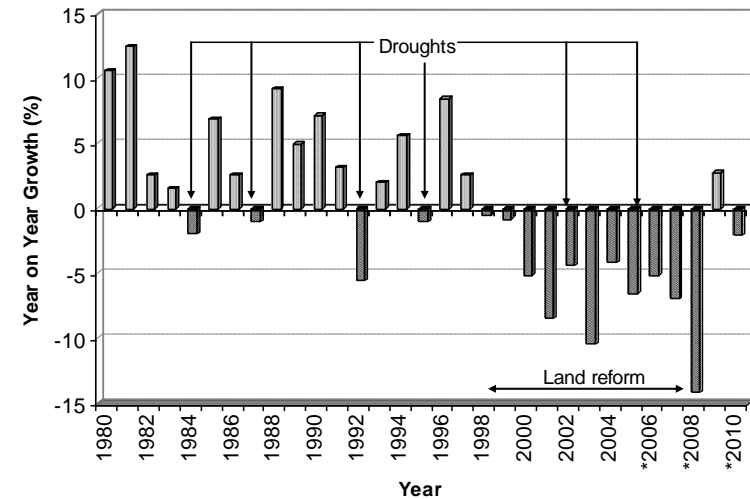
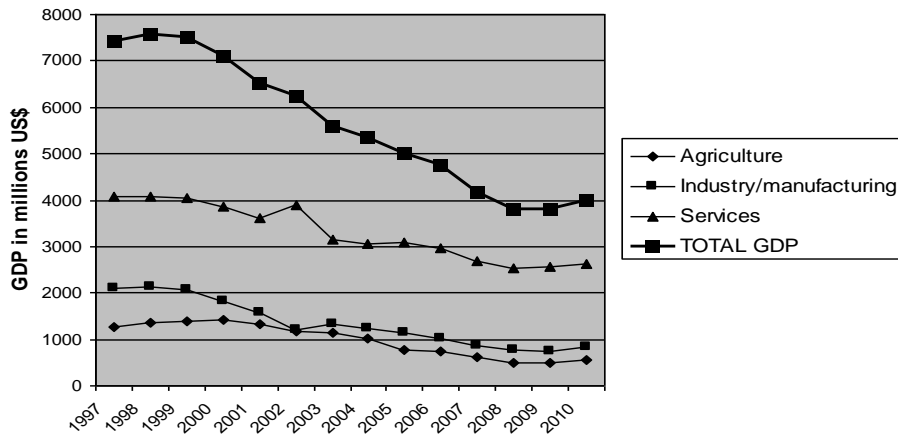
Especially in agriculture/land ownership
80% of production, 95% of export earnings

Sector	Number of farmers	Million hectares	% of total
Large-scale commercial	5600	15.5	39.1
Small-scale commercial	8000	1.4	3.5
Communal	1,100,000	16.4	41.4
National parks and urban	-	6.0	15.2
State land	-	0.3	0.8
Total	-	39.6	100

I. Zimbabwe – From bread basket to aid dependency

9'02

GDP of Zimbabwe



Between 2000 and 2008,
-GDP: - 71% of GDP (to 3.784 million US\$)
-Inflation and devaluation: +1 million % per year

Prolonged economic crisis:
Unemployment: from 30% to 80%
Massive out migration – brain drain

From a (formerly) transitional economy to a failed state (4th on Failed States Index Scores, 2010).

I. Zimbabwe – From bread basket to aid dependency

11'23

Regarding agriculture -Deteriorated state of (commercial) agriculture:

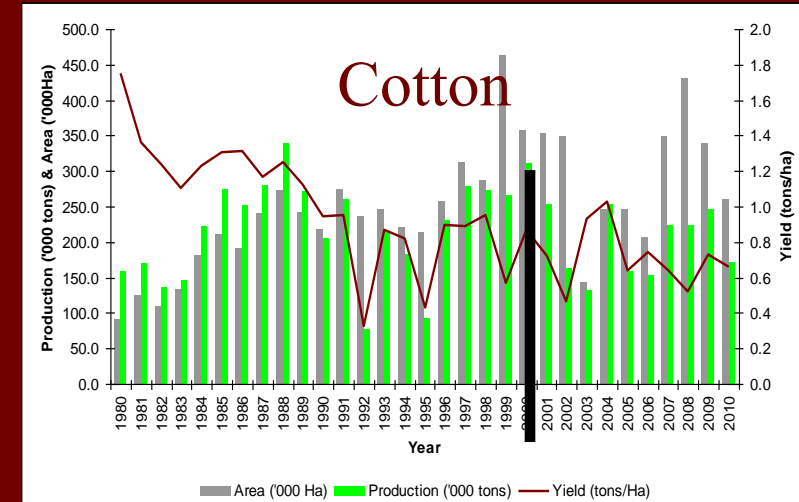
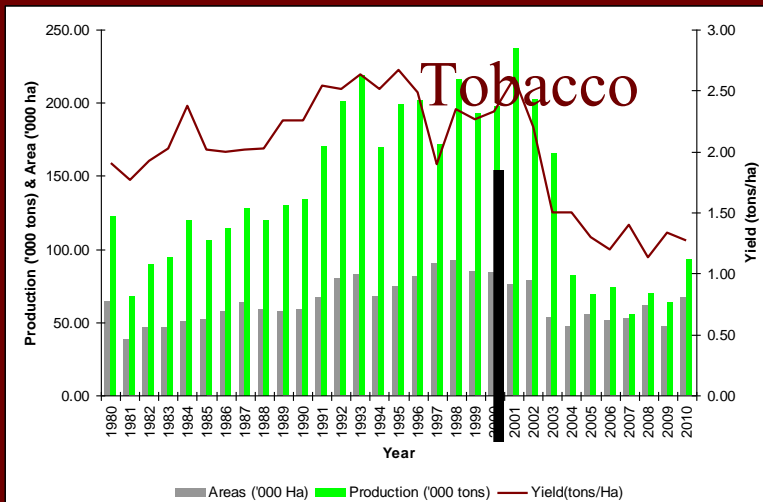
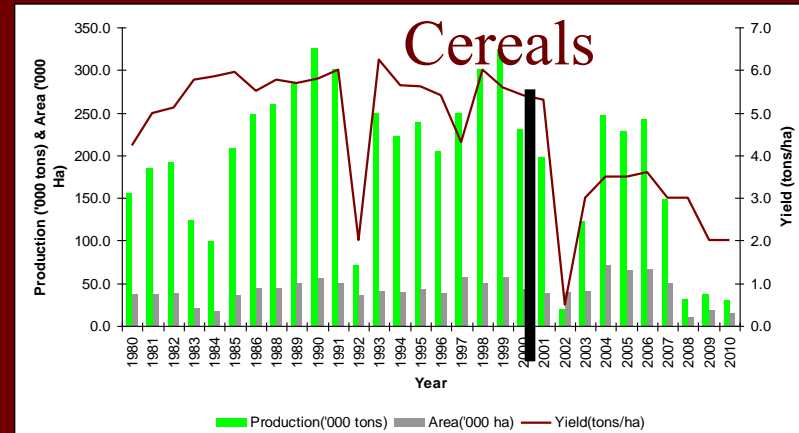
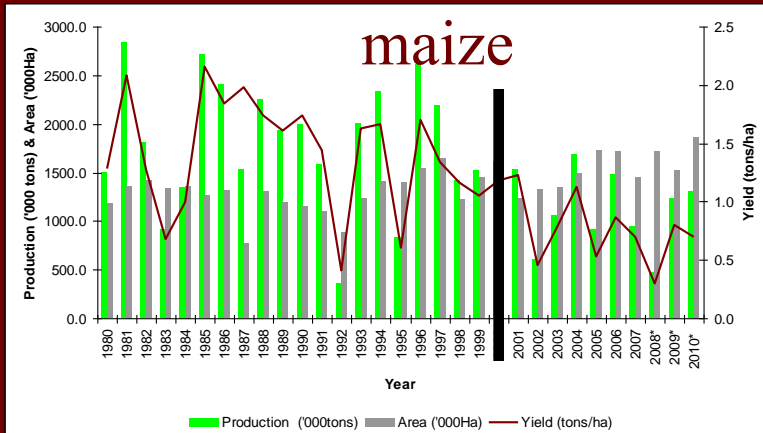
- Nationalisation of land – reinforcement of boards/State regulation
- Zimbabwe has moved from being a food surplus (and in some years an exporting nation) to a food deficit and importing country (1/3 population depending on food aid)

Between 2000 and 2008,

- Agriculture GDP: -116%
- Contribution of agricultural sector to GDP: 20.4% => 12,8%
- 400 000 jobs and represented the country's main source of export revenues and foreign exchange
- collapse agricultural (input – output) markets, credit

I. Zimbabwe – From bread basket to aid dependency

12'15



II. Revisiting the Impacts of Zimbabwe's Land Reform

(2008-2011)

12'48

The development of a new sector (on nationalized land)

Farm Class	Land Tenure	Farms/Households		Area		
		Numbers	% of Total	Hectares (mil)	% of Total	Farm Size(ha)
Smallholder	Communal	1,100,000		16.400		15
	Old Resettlement	72,000		3.700		51
	A1	141,656		5.7		40
	Sub-total	1,313,656	98	25.8	75.6	20
Small to Medium Scale Commercial	Old SSCF	8,000		1.400		175
	Small A2	14,072		1.000		71
	Sub-total	22,072	1.6	2.400	7	109
Large-scale Commercial	Medium-LargeA2	1,500		0.900		600
	Black LSCF	1,440		0.900		325
	White LSCF	1,377		1.200		871
	Sub-total	4,317	0.3	3.000	9.0	695
Corporate Estates	Company	657		1.000		1,522
	Church	64		0.041		641
	Parastatal	153		0.600		3,922
	Sub-total	874	0.1	1.641	4.8	1,878
Transitional	Unallocated			1.300	3.8	
Total		1,340,919		34,141	100	

II. Revisiting the impacts of Zimbabwe's land reform

13'58

(2008-2011)

1. The (necessary) revival of smallholder farming

The collapse of commercial farming

➡ Replaced by an heterogeneous smallholder sector

-1.1 million communal farmers (and 72,000 old resettlement area farmers),

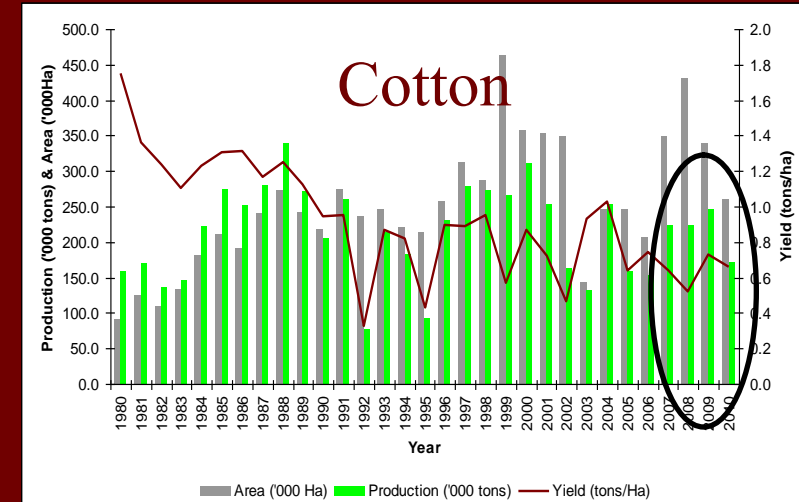
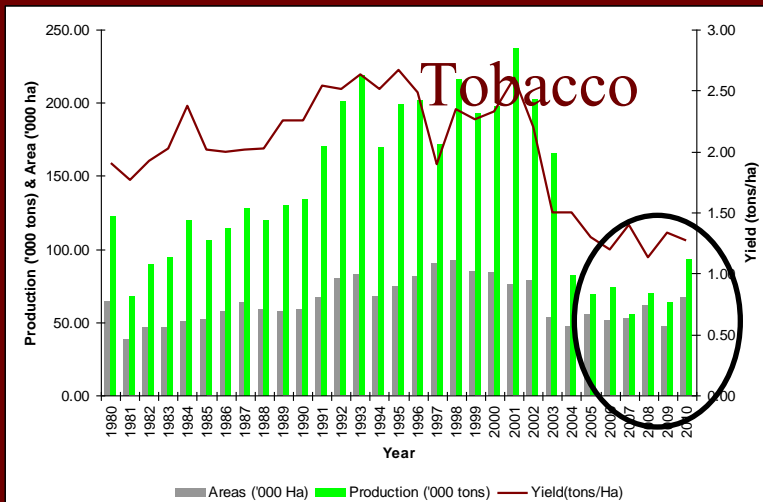
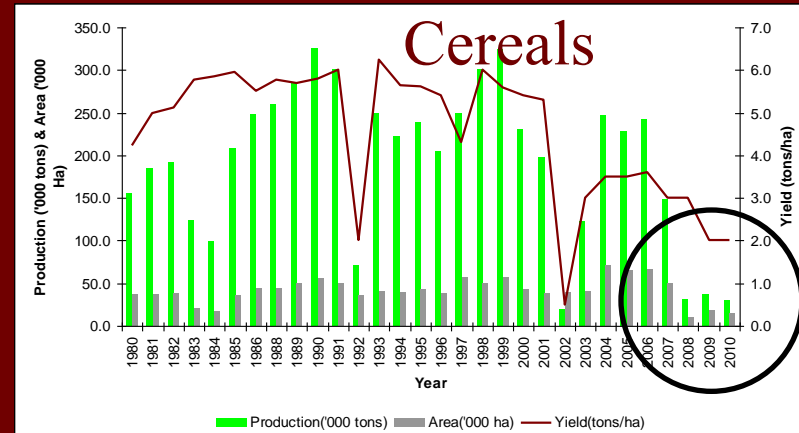
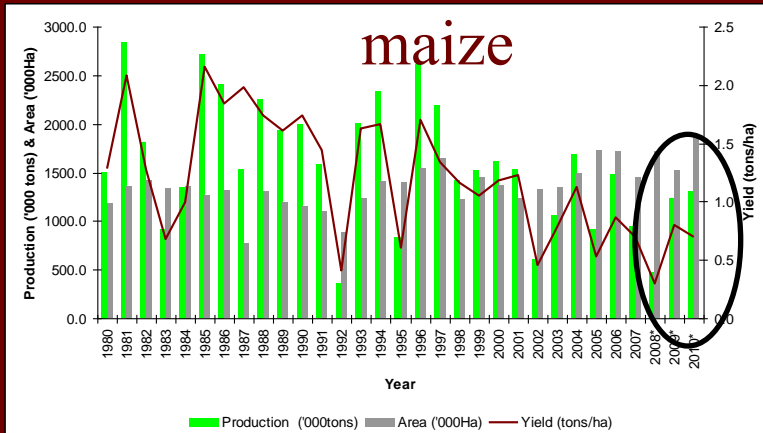
-141,000 A1 farmers

-Total: 1.3 million farmers occupying close to 26 million hectares (75% of the land)

➡ Covering 50% of agricultural needs

I. Zimbabwe – From bread basket to aid dependency

14'50

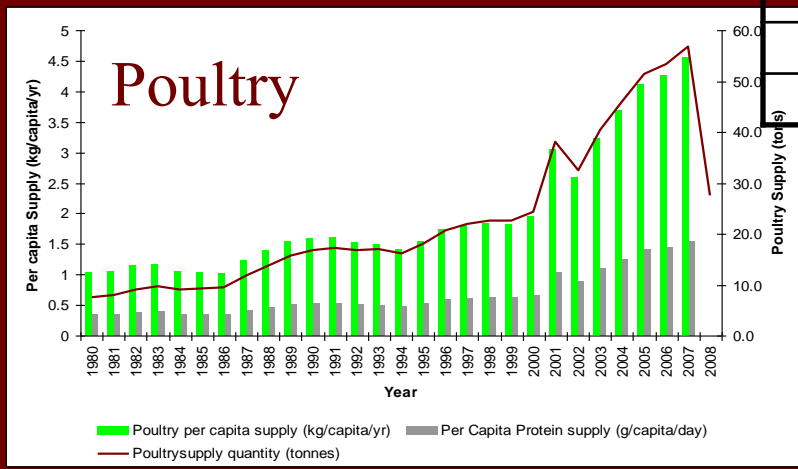


II. Revisiting the impacts of Zimbabwe's land reform

15'35

(2008-2011)

	Commercial (⁰⁰⁰)	Communa l (⁰⁰⁰)	Resettlem ent (⁰⁰⁰)	A1 (⁰⁰⁰)	A2 (⁰⁰⁰)	Total (⁰⁰⁰)
1993	1,748	2,964	308			5,02
1994	1,67	3,138	332			5,14
1995	1,617	3,07	305			4,992
1996	1,642	3,104	332			5,078
1997	1,625	3,427	323			5,375
1998	1,560.313	3,495	395			5,45
1999	1,68	3,69	468			5,837
2000	1,55	3,793	612			5,955
2001	1,291	4,398	505			6,195
2002	329	4,055	471	169	24	5,048
2003	360.	3,944	548.	169.	93.	5,116
2004	377.	3,755	535	307.	52	5,027
2005		3604	52`	324.	319	4,768



II. Revisiting the impacts of Zimbabwe's land reform

16'17

(2008-2011)

Food security actually increased

Year	Total cereal required in 000 t	Food imports in 000 t			% Self-sufficiency	Aid as % of import
		Total Imports	Commercial Imports	As Food Aid		
2001/2	1,940	448	434	14	77	3.13
2002/3	1,940	1,216	855	361	37	29.69
2003/4	1,940	830	433	397	57	47.83
2004/5	1,940	835	686	149	57	17.84
2005/6	1,940	848	755	93	56	10.97
2006/7	1,928	441	342	99	77	22.45
2007/8	1,928	789	502	287	59	36.38
2008/9	1,875	986	728	258	47	26.17
2009/10*	1,738	680	500	180	61	26.47

Year	Number of Food Insecure people	% Food Insecure People
2001/2	6,074,000	55.2
2002/3	4,400,000	40.0
2003/4	5,423,000	49.3
2004/5	2,300,000	20.9
2005/6	1,500,000	13.6
2006/7	1,400,000	12.7
2007/8	4,100,000	37.3
2008/9	1,571,799	14.3
2009/10*	2,300,000	20.9

But, little LT perspectives
 -No tenure security
 -No capital
 -No markets

II. Revisiting the impacts of Zimbabwe's land reform

18'11

(2008-2011)

2. The mushrooming of corporate farming

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III. Conclusion - The resilience of small-scale family farming and the polarization of the agricultural sector

In a context of 'anti'-globalisation ... Increased diversity of farming systems

- Smallholder farming
- Corporate farming

Only Mugabe's political game to be blamed? What alternative did he have?

Increased polarisation (from dual to polarized)

Strongly resilience of smallholder farming

BUT

- with few perspectives
- Continued marginalization of smallholder farming

III. Conclusion - Smallholder farming, a political sector

23'04

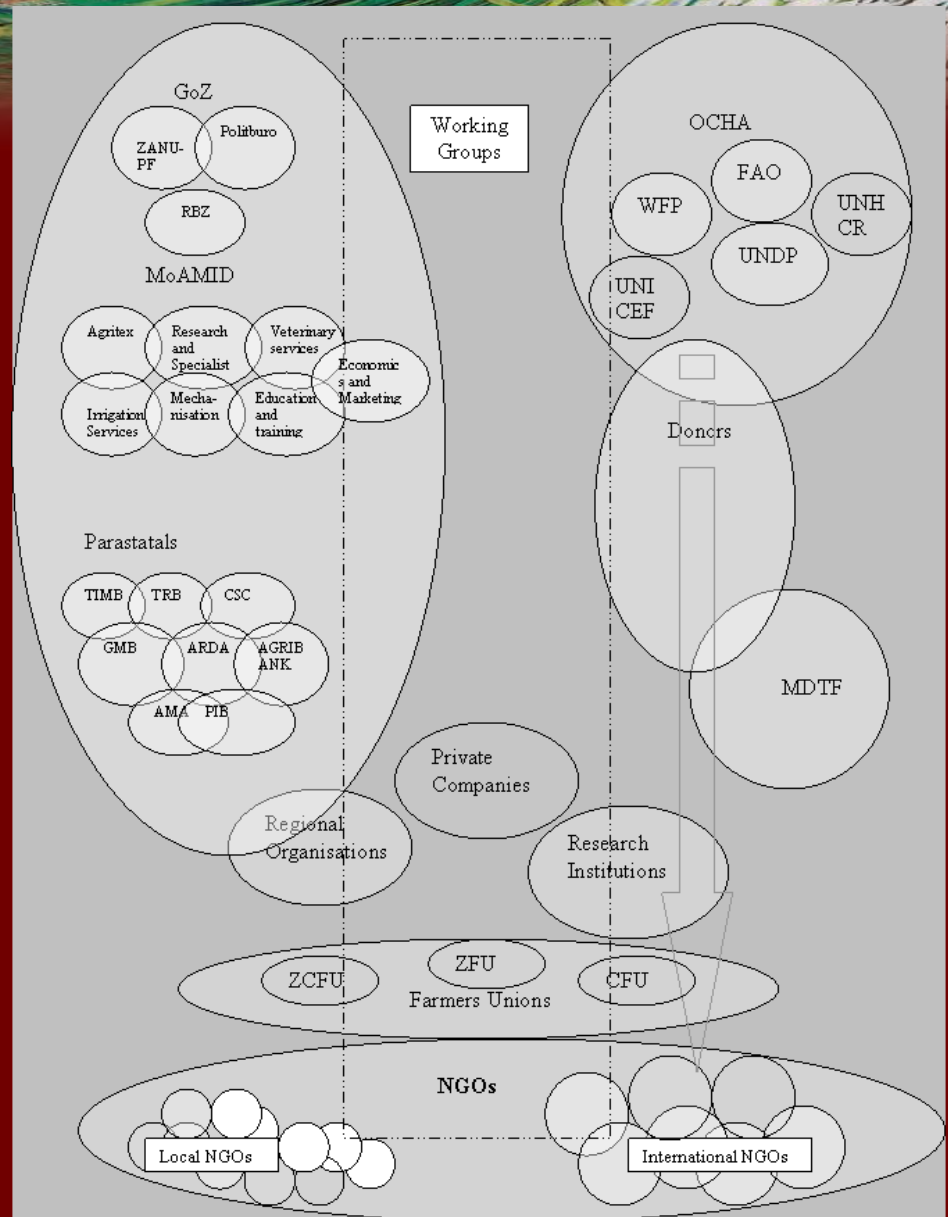
The sector/the focus on it is being politicized
- Political will?

New: Acceptance of the necessity of the smallholder sector
- Changing (perception of) role = social
(reservoir for the surplus of labour that cannot be absorbed by the urban economy)

Large-scale/corporate farming seen as engine of economic growth and development

III. Conclusion - The absence of agricultural policies/views

- No agricultural policies since the FTLRP
- No reflection on (the role of) agriculture/policies
- Project-led
 - No structural reflection
 - Ad hoc
 - Contradiction: Dual institutional channels (State vs donors)
 - Emergency vs power strategies
- Non-alignment of donors



III. Conclusion - *'Bye-bye the white – welcome the yellow'*

27'03

Look East and China

Look East Policy

- bilateral agreements, mainly with China (trade facilities, land tenure, tax, protected from indigenization Act)

Loans/grants

- US\$700M (while the WB refused a US\$50M loan) –
Agricultural machinery/telecommunications/education/...

2nd investor/trade partner in/of Zimbabwe

- Import manufacturing products (5%), export (10%)
- Mining (diamonds)
- Also in agriculture (Twinning programme - negotiations ongoing in Mashonaland east - 25-year lease renewable)
- Export of 100% cotton/tobacco (contract farming) (Sinotex signed a US\$500M deal to finance local production and purchases through a contract growing plan)