Zimbabwe Organic Sector Strategy 2019 – 2029

Organic Agriculture - Zimbabwe's Future

zoppatrust

Contents

Strategy overview 2

Zimbabwe's organic sector 3

Opportunities 4

Challenges 4

Strategic activities 5

1. Building producer capacity 5
2. Improving support services 6
3. Improving the enabling environment 7
4. Addressing market obstacles 8

Roles and responsibilities 8

Strategy overview

Our 10-year vision: to develop an organized and vibrant organic sector that is highly visible nationally while competing regionally and internationally.

Our mission: To develop the Zimbabwe organic sector through stakeholder participation, achieving vibrancy and sustainability.

Our values:

Maximum participation	Visibility
Co-operation	Openness and honesty
Good communication	High quality products
Sharing experiences and ideas	Reputation for efficiency

Strategic aims and objectives

By 2026 we aim to have

1. increased the capacity of at least 80% of Zimbabwean organic producers to compete effectively in at least 60% of local and international markets.

   by:
   - increasing the quality and quantity of production.
   - improving support services (extension, finance, resource provision, information and communication, research and certification).
   - advocating for improving the enabling environment.

2. improved value chain effectiveness and competitiveness

   by:
   - identifying and addressing obstacles,
   - facilitating communication between all value chain actors,
   - empowering marginalised actors to participate to their fullest potential,

Roles

ZOPPA will coordinate the strategic activities; facilitate communications and resource mobilization and monitor implementation. Six working groups: Horticulture, Poultry and Small livestock, Pulses, Fruits and Wild Collections, Small Grains and Herbs co-ordinated by ZOPPA will address the goals with respect to their value chain.

Zimbabwe's organic sector

The organic sector in Zimbabwe has gradually expanded from the informal activities of a few individuals to a formalised sector with commercial growers and processors producing high quality products for both local and international markets. The sector could exploit many potential opportunities if the current challenges are addressed. This strategy was developed during a consultative process held between September 2015 and February 2016, by stakeholders (including representatives from government, the private sector, technical support services, academia, organic producers, farmer support organizations, civil society, importers and inspectors). The process was facilitated by the Zimbabwe Organic Producers and Promoters Association (ZOPPA) Trust and Kaite Trust, supported by Christian Aid.

ZOPPA Trust

ZOPPA Trust was established in 2008 as a national membership organisation, bringing together producers, promoters and processors for the development of the organic agriculture sector in Zimbabwe. ZOPPA lobbies and advocates for the growth of organic agriculture in Zimbabwe by coordinating activities of members, sourcing and providing information on markets, standardising production and ensuring compliance to organic standards for entry into the organic niche' markets.

Trends in the organic sector

Worldwide the organic market share has been increasing at a rate of 20% per annum and the increase in demand has also been recorded in Zimbabwe with some Zimbabwean organic companies having achieved commercial success. There has been increasing interest from formal markets but challenges relating to lack of consistency in supply and lack of consumer awareness remain.

Thousands of smallholder farmers have been trained in organic production and marketing although farmers do not know how to access the markets. Organic agriculture value chains have expanded and become distinct from traditional horticulture and field crops value chains. There is also growth of livestock value chains with different needs such as organic feeds and veterinary products.

While there are emerging technical service providers, their services have not been readily accessible.

Opportunities

- Growing markets for organic produce as demand for healthy eating grows locally and globally.
- The existence of small organised producer groups for both crops and livestock, which can potentially be organised for improved production, volumes and increased market presence/ economies of scale.
- There are opportunities for growing the organic input sector beyond the current few suppliers of organic fertiliser.
- The government of Zimbabwe policy prohibiting Genetically Modified Organisms increases the potential for the export of Zimbabwean organic products.
- There are several underutilised species in Zimbabwe with considerable potential for value-addition to develop novel products such as wild fruit flavourants.
- There are opportunities to be explored within the tourism market including restaurants selling more traditional organic Zimbabwean foods.
- Zimbabwe's workforce has a reputation for being hardworking, trustworthy and reliable making Zimbabwe a good country to engage for imports.

Challenges

Finance obstacles - Agriculture finance facilities are expensive in terms of repayment and interest terms and also organic agriculture proposals are considered risky.
Poor water availability - Water resources are declining due to climate change and poor management. Irrigation is expensive and there is confusion about water rights.
Lack of extension support - The government agricultural extension services lack training and an absence of organic agriculture content in the agriculture curriculum in schools and colleges mean there is little extension support for farmers.
Weak organic inputs market - Some organic inputs are available but there are no recommendations on dosage of organic inputs for soil fertility management and pest and diseases control. Pesticides made from local plants are not available on the market.
Market challenges - competition from imports and high product prices pushed up further by input costs are obstacles. The wider national market does not see organic status as a selling point limiting sales to a few high-end niche markets. There is a lack of market information along the value chain. Certification and traceability are weak. Buyers often dictate unfair terms while lack of supply consistency has reduced

confidence in markets. Lack of information on markets both local and exports restrict producers.

Transport issues - Transport infrastructure is poor. High vehicle maintenance costs and lack of producer coordination increases transport costs which are passed on to consumers.

Certification challenges – Most stakeholders do not understand certification standards. The standards are not enforced or policed by the authorities. Organic certification services are expensive due to limited service providers and demand from too few producers.

Challenges for export markets – Unpredictability in terms of policy changes, bureaucracy, high transport costs and duties on imports makes Zimbabwe less competitive regarding organic food.

Weak online presence. The lack of reliable and up-to-date information about the sector in Zimbabwe online makes it difficult to develop contacts and build relationships.

Limited information sharing along the value chain causes wasted resources through duplication of efforts.

Domination by the older generation. Most enthusiasm for the organic sector comes from long-standing producers while the young generation is not so keen.

Strategic activities

The following activities will be carried out:

1. Building producer capacity

- Supporting a coordinated production system based on market research to achieve supply consistency.
- Encouraging service providers to set up demonstration plots and other awareness-raising activities to help farmers to improve production.
- Strengthening producer associations to provide relevant services.
- Instituting farmer mentorship programs to boost production.
- Introduce incentives such as a fellowship for farmers to motivate and promote organic agriculture.
- Strengthen existing organic producer structures to encourage more and diverse producers to participate in the sector.
- Enticing young producers by offering training, information, introducing labour-saving technologies and promoting organic agriculture as a viable and lucrative business opportunity.

2. Improving support services

These services include extension, finance, resource provision, information and communication, research and certification. The following will be addressed by this strategy:

i. Extension

3. Capacity-building agriculture extension services and developing an advisory service on soil fertility, pest and diseases management.
4. Developing a training strategy for farmers on improved production methods, running organic enterprises as a business and instilling a sustainability mind-set.

ii. Water resources development and access

5. Improving water access and management through introducing technologies (such as water-harvesting and drip irrigation), facilitating finance for water provision, lobbying the authorities to improve water access, engaging traditional leadership and mobilizing communities on water management.

iii. Certification

- Capacity-building stakeholders in standards knowledge, application and compliance to achieve a standardisation differentiating organic products from conventional ones.
- Developing simplified organic standards handbooks, online resources and apps.
- Capacity-building producers and strengthening of certification services on different types of certification required by different markets.
- Reducing the costs of certification by encouraging more farmers to get certified initially through encouraging producers to set quality standards and eventually graduate to certification.

iv. Information and communication

- Disseminating the information on different media platforms down to grassroots.
- Organising regular discussion forums to mobilize and empower producers to demand better services.
- Organising awareness-raising road shows, radio programmes, television presentation, online and print publications.
- Getting the organic discourse into mainstream organic platforms.
- Packaging information in different formats (such as audio, video, print and photographic, podcasts and mobile phone technology); simplified and translated into the vernacular for specific audiences.

- Creating platforms of information sharing between researchers, extension officers and service providers.
- Creating a monthly (print and electronic) publication publicising news, trends, activities and a calendars of events.
- Developing a regularly updated database of producers and product availability.
- Organizing media tours to communities and individual organic farmers, media training and regular media briefings and press conferences.
- Developing a website capable of uploading information in many forms (video, audio, pictures) to become a platform for members to: access publications and contributions; exchange experiences and best practices; access an online marketing facility exposing and linking members to regional and global organic agriculture movements.

v. Research

- Researching issues of immediate concern to producers such as: organic inputs dosage, analysis of purity and nutrient content of organic fertilizers, validation of the effectiveness of pests and disease treatments and viable/ sustainable cropping/ intercropping patterns.
- Investing into research on the properties of under-utilized local products and improving frameworks for traceability, certification and analysis of the products.
- Developing relevant participatory research programmes with farmers.
- Facilitating the repackaging of research information by extension officers, documentation of such information and dissemination for implementation by farmers.

3. Improving the enabling environment

The following activities will encourage better support from government through policy and policy implementation:

- Engaging with the Ministry of Agriculture to add a section on organic agriculture to the new agricultural policy since the current one is still a draft.
- Participating in consultations on policy between Ministry of Agriculture and the Agriculture Development and Research Authority.
- Identifying strategic policy-makers to lobby and interacting directly with relevant government departments to showcase breakthroughs, and needs of the sector as well as policy gaps.
- Taking advantage of existing platforms to raise profile of organics such as the Standards Association of Zimbabwe.

- Raising awareness of producers of the local and international developments in the organic sector especially familiarization with Organic 3.0[1].
- Achieving representation on all relevant councils such as the Food and Nutrition council, to increase appreciation and recognition of organic agriculture.
- Empowering organic farmers' associations to fully participate in forums and influence sector wide changes.

4. Addressing market obstacles

An effective marketing strategy for both local and export will be achieved through:

- Doing a SWOT analysis of available markets and developing alliances with those best matching the sector needs (such as those which promote visibility and absorb large quantities of products).
- Conducting in-depth market research including on demand and consumer tastes, product development and processing potentials.
- Encouraging producers to invest in product development including improved packaging.
- Capacity-building for relevant stakeholders (including producers, processors, extension officers) on marketing.
- Engaging buyers, processors, traders and exporters to enter into out-growers' schemes and contract farming.
- Improve the quality of products especially for export markets and supporting white label[2] production for export and local markets to add value to the organic market.

Roles and responsibilities

The implementation of this strategy will be done in a participatory manner with responsibility taken by the ZOPPA membership.

ZOPPA's role

ZOPPA is at the centre of developing the organic sector thus its role in this strategy is:

- Facilitation and coordination of the strategic activities
- acting as an information hub
- facilitating resource mobilization for implementation

[1] The third stage in the development of the international organic sector. http://www.ifoam.bio/en/organic-policy-guarantee/organic-30-next-phase-organic-development

[2] Products produced by one company then rebranded and sold by another

- monitoring implementation.

This will involve convening meetings for different groups of stakeholders, linking different groups, bringing in required knowledge, introducing new technologies, making sure that activities are done on time, and holding regular planning meetings and strategy reviews.

Value chain working groups

In terms of implementation of specific activities, ZOPPA will co-ordinate through six working groups which are related to specific value chains, which aim to be inclusive of diverse groups of stakeholders. These working groups are: Horticulture, Poultry and Small livestock, Pulses, Fruits and Wild Collections, Small Grains and Herbs. Each will address the strategy areas: (production capacity, enabling environment, support services and market obstacles) with respect to their value chain. Each working group will aim to address constraints for their respective value chain and will receive information and technical support from ZOPPA.