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Changing Agrarian Relations after Redistributive Land Reform in Zimbabwe

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Introduction

Zimbabwe's Fast Track Land Reform Programme (FTLRP) initiated from 2000 extensively redistributed land, mainly to peasants and working peoples (see Moyo 2011c) and, in doing so, unravelled the labour reserve economy created over a century of settler-colonial agrarian capitalism. This change has created a broader range of prospects for progressive agrarian transformation, despite the persistence of inequalities and exploitative social relations. The dominant discourses have reflected such agrarian changes, however, by narrowly focusing their attention on the immediate consequences of the FTLRP, particularly on the decline in agricultural output and formal employment which are conceived of in a linear fashion (e.g., UNDP 2010). Moreover, this narrow view is dramatised by such erroneous claims as, for example, Zimbabwe's large-scale white farms having been the breadbasket of Southern Africa, when, in fact, they constituted an irregular food exporter and importer, as South Africa met the regional food deficits (Moyo 2010). Such narrative attributes the decline merely to the replacement of skilled large-scale white farmers with alleged 'subsistence' producers (e.g., Tupy 2007) and to the loss of private property rights (e.g., Richardson 2005).

Reluctant to recognise the new farmers, this perspective vilifies their behaviour, defining them in blanket terms as 'part-time', 'weekend', or 'cell phone' farmers, who are 'unproductive' and hold land for speculation. This definition is set in

contrast to their erstwhile commercially-oriented counterparts. Anecdotal evidence is used to make vacuous claims that new farmers have destroyed the environment by wantonly cutting trees, degrading soils and silting water sources, in debates reminiscent of conservative colonial agrarian and environmental discourses (see Gore et al 1992). Ignoring Zimbabwe's agrarian history, they claim that almost all exports and 'marketed' foods were produced on a large-scale by white farmers until 1999. Yet, most small producers who supplied over 80 per cent of the nationally consumed wage-foods, such as maize and various pulses and basic meat products (see Moyo 2000), do not fit the label of 'subsistence' farmers. They also contributed significantly to exports such as cotton (80%), tobacco (10%) and paprika (over 30%) from 1980, despite the continued bias of agricultural support towards white farmers and their historical exclusion from irrigation development (see Moyo 2000). When the economy was liberalised from 1990, per capita and land productivity levels of food grains among small producers began to decline (Anderson 2007), although cotton outputs remained steady, while large-scale farmers cashed in on the export incentives and financial market de-regulation (Moyo 2000).

This pessimism, regarding the ascribed productivity deficiencies of black farmers, occludes the re-orientation of Zimbabwe's agrarian system towards improvements in the broader livelihoods of differentiated classes of farmers and its focus on social priorities. Limited research has been done on the re-composition of agricultural outputs and production relations in relation to the reconfiguration of Zimbabwe's agrarian classes, changing market relations and shifting state interventions in order to decipher the emerging accumulation trajectories. Consequently, the changing uses of land and labour by the heterogeneous farming classes with differentiated access to agrarian markets, within different agro-ecologies and contexts are glossed over, missing their diverse production outcomes. The literature fails to note that the agrarian labour regime has changed due to the creation of a diverse range of smaller capitalist farms and peasants (see also Chambati, Chapter 5), who compete with remaining large-scale farms for labour and access to agrarian markets and credit. Moreover, changing agrarian relations in a labour reserve economy which is being restructured were inevitably influenced by what was happening with urban production and labour markets.

The FTLRP and agrarian reform imposed varied changes on the workings of capital, in the domestic and external spheres, given the differentiated exposure of Zimbabwe's 15 main agricultural commodities to international and national commodity and financial markets. Few scholars have examined how Zimbabwe's agrarian markets have been reconfigured as capital adapts its strategies to the new agrarian structure, changing state policy and increased speculation and volatility

on global commodity markets, especially from 2005 (Moyo 2011b). Those who explore the restructuring of 'commodity value chains' (e.g., Scoones et al 2010), do not adequately capture the national and international reconfiguration of agricultural inputs, outputs and financial markets, nor the shifting logic and orientation of state interventions in agriculture in response to capital.

In particular, the nuances of state agrarian intervention are clouded by perspectives which assume that 'chaos' and 'politicisation' pervaded the agrarian reform, missing the substantive class and regional dynamics in which state action is embedded. Media-based reports highlighted corruption and patronage in favour of ZANU-PF-aligned elites based on populist perspectives which ground all state action and social agency in the ruling political party (ZANU-PF). The state is narrowly conceptualised as being intrinsically neopatrimonial, allegedly driven by unproductive 'rent seeking' and consumptive distributional behaviour. For instance, a mass of small farmers are seen to engage in production without state support, conceived in terms of direct inputs donation (see Scoones et al 2010), despite the evidence which suggests otherwise. Moreover, it is argued that public extension services collapsed and failed to promote progressive agronomic practises, despite the increased presence of the state locally (see Murisa, Chapter 7). These perspectives under study the emerging state-capital relations in agrarian markets and the new forms of surplus value creation and extraction, as well as their implications for the wider politics of agrarian reform.

The Government of Zimbabwe (GoZ) has insisted that the root cause of the decline in output and productivity has been the external sanctions imposed on Zimbabwe, alongside the effects of three droughts between 2001 and 2011, as well as 'sabotage' by capital. Allegedly, the white farmers dismantled key farm infrastructures and commercial banks were reluctant to fund new farmers, ostensibly for lack of title, while input suppliers and commodity merchants, who tended to go on a 'capital strike', were apparently more interested in profiteering and externalisation of earnings (Reserve Bank of Zimbabwe [RBZ] 2007a). Moreover, the government argues that it supported farmers and intermediaries in a non-partisan manner, in the face of droughts, structural constraints on credit and fiscal capacity and political isolation and sanctions imposed by western nations (RBZ 2007a). Indeed, little empirical work has been undertaken to understand the constraints facing newly settled farmers, particularly their limited access to inputs and credit.

Various constraints existed, but policy implementation was also riddled by inconsistencies and class contradictions (Moyo and Yeros 2007, 2009). The dilemma was how to finance agrarian reform in favour of peasants, at a time when the political and class struggles evoked by radical land reform were highly polarised,

while securing state autonomy in the face of political isolation, economic sanctions and other external interventions in domestic politics.

Moreover, the state's confrontation with western powers, whose strategic interests in the settler economies and security architecture of Southern Africa were being challenged, not only led to debilitating sanctions, but also unravelled historic regional economic cooperation. Together, these engendered a hostile external environment, rather than support for progressive agrarian reforms. Indeed, the manner in which the commodity, food and financial crisis of global capitalism significantly influenced agrarian change in Zimbabwe (as elsewhere) at the height of land reform is under-examined.

Consequently, the policy alternatives which are presently being proposed by key political actors, donors and think tanks focus narrowly on dispossessing some (if not most) of the land beneficiaries. They assume that the land beneficiaries are inherently incapable of producing commercially and promote privatising land tenure, ostensibly to improve access to credit. Such green revolution-type reforms are intended to integrate small farmers into dominant foreign agribusiness and to obviate state agrarian intervention (e.g. USAID 2010). Moreover, some international agencies (e.g. World Bank 2012; BBC 2011) are 'surprised' by the current scale of agricultural recovery, largely due to the empirical and analytic weaknesses of dominant discourses on agrarian change since the FTLRP.

These questions require attention in the context of a progressive vision of transforming settler-colonial agrarian relations, recognising that land redistribution on its own cannot address all pre-existing agrarian inequities. Yet the egalitarian landholding structure and the relief against the super-exploitation of labour which emerged represent social progress which cannot be understated because of the present failure to institute fully socialised agrarian relations (such as collective and/or state farms), as some imply, or because of the loss of capital accumulation at scale as others imply (see Sender and Johnson 2004). Redistributive land reform responds to the political and social imperatives of addressing the historical social injustices and debunks the presumed inevitability of an economic and agricultural 'development' system created through a functional dualism in favour of a settler dominated capitalist transition and accumulation from above.

Nonetheless, Zimbabwe's agrarian class composition and the social orientation of farming have changed substantially enough to restructure the technical organisation of agricultural production, largely around family labour processes, while enabling capital to re-orient its strategies of agro-industrial inputs supply and to adjust the market mechanisms used by agrarian merchants and finance capital to extract surpluses. Contrary to perspectives which overemphasise the (in)capacity

of new and smaller farmers in recovering agricultural output, capital continues to play a critical role in shaping agricultural production relations.

Progressive agrarian reforms in Zimbabwe ought to promote increased productivity among small producers to increase food sovereignty and other supplies to home markets and to enhance industrial diversification and employment. This improvement requires transformation of the agro-industrial system to adapt to the new technical and social relations of production, through equitable forms of inputs production and distribution and democratic systems of generating knowledge and controlling intellectual property rights. Agrarian reform requires an articulated national development strategy, which emphasises accumulation from below. Critical is the protection of producers, through trade policy and subsidies, to insulate them from the highly protected, subsidised, speculative and volatile world markets (Chang 2009; Ghosh 2008) and to balance the interests of producers and consumers (see Patnaik 2008). Such a vision requires stronger producer cooperation and activism, in alliance with working class consumers, against dominant capital which prioritises externally-oriented production and markets, while depressing commodity prices (Moyo and Yeros 2005). Realising this vision ultimately depends on the correlation of social forces, the nature of formal and informal social struggles and the substantive content and politics of struggles for democratisation.

This chapter explores the macro-processes of agrarian change that emerged during the FTLRP. After outlining Zimbabwe's agrarian history and the new agrarian structure, section three examines the agrarian policies instituted since 2000. The chapter then interrogates the emerging composition and trends of agricultural outputs and productivity, within their class and regional contexts, while identifying the accumulation trajectory underway. Patterns of access to agrarian markets, including the role of the state, are then explored, highlighting their reconfiguration, the re-insertion of diverse foreign capitals and the socially differentiated access to and utilisation of inputs. Farming contracts tied to inputs supplies intended largely for export increasingly entrench differentiated investment and productivity. Finally, the chapter examines the way agrarian politics are re-oriented by farmers' reorganisation for state support and access to markets, while defending their land (see also Murisa, Chapter 7). This examination highlights the waning agrarian radicalism within a state with limited fiscal capacity and the renewed dominance of a multi-racial and foreign capital. Western donors simultaneously use limited aid and sanctions to influence the orientation of agrarian policy as Zimbabwe is saliently re-integrated into more diverse world markets.¹

Agrarian history and land reform

Equitable agrarian reform in Zimbabwe was compromised during independence negotiations in 1979 in favour of power transfer and liberal democratic reform (Habib 2011). Settler-colonial accumulation by dispossession from 1890 created a labour reserve economy (Amin 1972), dependent on cheap domestic and foreign migrant labour (Arrighi 1973). Peasant farming, rural small-scale industry and commerce were repressed through extra-economic regulations and taxes, but this did not create full-scale proletarianisation (Bush and Cliffe 1984; Yeros 2002). Racial and class inequalities in the agrarian relations were consolidated by discriminatory subsidies to large-scale farmers (Moyana 2002) and narrow import substitution export-led strategies. The consequent rise and fall of the peasantry is well documented (Weiner 1988).

Rhodesia's agricultural transformation strategy entailed state support for large-scale farming, including individual white settlers with an average land size of 2,000 hectares and foreign and domestic estates, with average landholdings well above 5,000 hectares. From 1966, state support to large-scale irrigated estate farming, through dams, rural electrification and other infrastructures, was increased (see Rukuni et al 2006), to expand exports and reduce sugar and wheat imports (see Stoneman 1988). By the 1970s, state-owned farm estates were created, including through the Agricultural and Rural Development Authority (ARDA), which succeeded the Tribal Trust Lands Development Authority,² the Cold Storage Commission (CSC) and other parastatals. Large scale private estates before the FTLRP were largely owned by South African based transnational corporations, such as Triangle Sugar Corporation and Hippo Valley (Sugar) Estate (see EU 2007) and European and domestic white capital (e.g., Meikles, Tanganda Tea, Liebig's, Mazoe Estates, Ariston Holdings).

Domestic agribusiness conglomerates and estates included pioneer white family owners, some of which held mining exploitation licenses.³ The sugar estates had promoted the creation of white large-scale outgrower farmers called Independent Commercial Growers (ICGs), largely through Mauritian and South African immigrants, with average landholdings of 217 hectares (EU 2007). By 1971, Mkwesine Estate, owned by Triangle and Hippo Valley Estates, created black sugar outgrowers with 10 hectares (ibid). The tea estates had also created about 1,000 white and black outgrowers (see USAID 2010).

Thus, independent Zimbabwe inherited a racially skewed agrarian structure and discriminatory land tenures dominated by 6,000 white farmers and a few foreign and nationally- owned agro-industrial estates, alongside 700,000 peasant families and 8,000 small-scale black commercial farmers (Table 6.1). This tri-

modal agrarian structure was dominated by the large-scale capitalist farmers and secondarily by the estates at the expense of the peasantry. From 1980, Zimbabwe pursued a market-based land reform programme whose outcome by 1999 was limited, but relatively large in scale (e.g., compared to Kenya), while successfully meeting the limited production and livelihood targets it sought (Cusworth and Walker 1988; Moyo 1995; Cliffe 2000). This objective left the prevailing settler-colonial agrarian structure and labour regime generally intact.

The adoption of the Economic Structural Adjustment Programme (ESAP) in 1990 further encouraged renewed land concentration and foreign ownership. Furthermore, it exacerbated agrarian polarisation. This polarisation was also fuelled by increased export-oriented production on large-farms and the creation of extensive conservancies for eco-tourism (Moyo 2000). State agrarian subsidies and social welfare transfers to peasants were reduced, undermining the production gains that had been realised by the top 20 per cent of the peasantry and leading to a longer term decline in maize yields from 1991 (Anderson 2007). ESAP exposed farmers to volatile and monopolistic world markets and reinforced unequal production relations (Moyo 2000), while fuelling wider social dislocations as fiscal capacity dwindled (Bochwey et al 1998).

Increased rural landlessness and retrenchment of urban workers extended land hunger (Yeros 2002). Wage repression led to extensive strikes and protests by industrial and agricultural workers between 1994 and 1998 (Sachikonye 2003; Rutherford 2003). Unprecedented political conflicts emerged within and outside the ruling ZANU-PF, while external intervention in domestic politics escalated (Moyo and Yeros 2007). Elections, involving the newly-formed MDC, were bitterly contested from 2000, leading to increased electoral violence, authoritarian rule (Raftopoulos and Mlambo 2009) and the imposition of western sanctions. These contradictions ignited popular land occupations from 1997, affecting 20 per cent of the LSCF farms and many of these were led by liberation war veterans (Moyo 2001; see Sadomba and Masuko, Chapters 3 and 4).

By 2010, only about 300 white farmers remained in agriculture, alongside some agro-industrial estates. The government co-opted the process and gained control of it through state-led land expropriations and official allocations of land to over 150,000 families in two types of schemes under the Fast Track Land Reform Programme (GoZ 2001).⁴ Consequently, a more broadly based tri-modal agrarian structure representing competing models of accumulation has emerged (see Moyo, Chapter 2 for details), based on relatively distinct landholding size, forms of land tenure, social status of landholders and the dominant forms of labour used (Table 6.1).

Table 6.1 Agrarian structure: estimated landholdings from 1980 to 2010

Farm category	Farms/households (000s)						Area held (000 ha)						Average farm size (ha)		
	1980		2000		2010		1980*		2000*		2010*		1980	2000	2010
	No	%	No	%	No	%	Ha	%	ha	%	ha	%			
Peasantry	700	98	1,125	99	1,321	98	16,400	49	20,067	61	25,826	79	23	18	20
Mid-sized farms	8.5	1	8.5	1	30.9	2	1,400	4	1,400	4	4,400	13	165	165	142
Large farms	5.4	1	4,956	0.4	1,371	0.1	13,000	39	8,691.6	27	1,156.9	4	2,407	1,754	844
Agro-Estates	0.296	0.1	0.296	0.02	0.247	0.02	2,567	8	2,567	8	1,494.6	5	8,672	8,672	6,051
Total	714	100	1,139	100	1,353	100	33,367	100	32,726	100	32,878	100	46.7	28.7	24.3

Source: Adapted from Moyo 2011a (Table 1). NIB: The average farm size of the peasantry includes common grazing lands.

The enlarged peasantry is now dominant in terms of number of landholdings, covering over 75 per cent of all farming land. Agrarian relations among the socially differentiated peasantry continue to be defined mainly by self-employment of family labour towards producing foods for auto-consumption and selling some surpluses, as well as various non-farm work and short-term wage labour. Some peasants hire limited labour, while others provide labour services. Peasant families hold customary rights to cropping and homestead plots and common grazing areas (in Communal Areas and A1 areas), although the latter hold perpetual state permits for such land rights.

The number of middle-sized capitalist farmers who are more dependent on hired labour than on family labour has been tripled and these hold a wide range in size of landholdings (see Moyo, Chapter 2). The FTLRP substantially downsized the number, farm sizes and area of the large-scale individual or corporate owned capitalist farms. Together, these capitalist farms hold 40 per cent of the redistributed land, mostly on the leasehold tenure provided by the state. They mainly comprise former and new 'middle class' people with relatively higher levels of education, better access to jobs and more connections to the state and markets.

The main agro-industrial estates were retained, but on a smaller area as both the state-owned and privately held estates and conservancies were reduced in area (Table 6.1). The white independent sugar and tea producers were almost eliminated, while the number of black outgrowers was substantially increased. The level of foreign ownership of land was substantially reduced, but was retained among the sugar, tea and timber holdings, while the shareholdings of the conservancies were partly transferred to some black elites. The overall range of actors involved in outgrower farming, conservancies and forestry has been diversified in terms of race, nationality and class. Thus, some concentration of land, water, wildlife and woodlands resources was retained to preserve large scale, specialised and integrated enterprises, preserving some elements of the colonial land grab.

Thus, landlessness was not fully reversed, especially among farm labourers and in some overcrowded Communal Areas, creating a platform for new processes of labour exploitation and wider class and social struggles such that the exclusion of some potential land beneficiaries evokes persistent 'illegal' land occupations. While the policy of limiting access to redistributed land by former farm workers was partially motivated by the desire to ensure the availability of cheap labour supplies, the number of full-time hired labourers has declined, but short-term hired labour expanded. Such labour is provided on diverse types of farms and in diverse rural non-farm activities.

Thus, both re-peasantisation and semi-proletarianisation are simultaneous outcomes of the agrarian reforms since 2000 (Moyo and Yeros 2005). One cannot foreclose the trajectory (see O’Laughlin 2002), for unequal land and labour relations are being consolidated through new but limited mechanisms of land concentration (e.g., informal land rental markets), as well as capitalist farmers’ advocacy for the commodification of land and efforts to evict smaller landholders which are actively resisted. Social differentiation is on-going among all farming classes based on differential access to means of production (e.g., through sub-contracts), non-farm incomes, credit and state support (discussed below), while unequal gender relations and ethno-regional identity continue to influence agrarian struggles. However, expanded agrarian petty-commodity production imposes new structural conditions for capital accumulation with competing demands for state interventions within the tri-modal agrarian structure, while the space for accumulation from below remains contingent on the nature of agrarian struggles and mediation by the state.

Agrarian reform policies since the FTLRP

The FTLRP marked a major policy departure from neoliberal prescriptions on land and agrarian reform by eliminating private land ownership and land markets, while the land redistribution itself undermined the supply of cheap labour from large landless reserves. Redistribution also called into question the prevailing wisdom that agricultural growth and ‘viability’ required large-scale farms, which in Zimbabwe were pegged at a minimum of 500 hectares (Moyo 2002; Cousins and Scoones 2010). However, since redistribution provided black commercial farmers with relatively large individual plots ranging in size on average from 50 to 300 hectares, the idea of large-scale farms and the reliance on cheap labour were partially retained, presumably expecting abundant labour supplies from landless workers. Moreover, agrarian labour policy continued to be largely based on collective bargaining and flexible hiring rules, which has allowed for persistently low wages (Chambati 2011), although limited output growth constrains our measurement of the precise shares of wages and profits. Nonetheless, the FTLRP process rowed against the current of escalating land alienation intended to create larger-scale capitalist estates in Africa, drawing political opposition and western sanctions.

The new tri-modal agrarian structure necessitated agrarian policy reforms, reversing the liberalisation adopted between 1990 and 2001, given its failure to stabilise supplies and prices, particularly for poor producers and consumers. Heterodox economic and agrarian policies were re-introduced within a dirigiste

framework between 2001 and 2007, while negotiating 'normalisation' with capital by allowing it to operate in controlled markets and subsidising some agro-industrial estates and agri-businesses (Moyo 2011b). The wider goal was to promote auto-centred development, alongside addressing fuel, food and inputs shortages and price hikes. The agrarian reform strategy, particularly its specific policy instruments, did not begin as one holistic and coherent plan, but rather evolved in response to changing social and production conditions and struggles on the ground, especially as output fell and inputs shortages grew, in the face of increasing sanctions. By 2003, the state had adopted various economic plans and in 2006 issued the National Economic Development Priority Programme (NEDPP), in which it partially relaxed some market restrictions and escalated the state subsidies.

Significant coordination and implementation inconsistencies emerged from the start and a strategy of 'Command Agriculture' was introduced to direct agricultural production towards set output targets, using subsidised inputs and credit (GoZ 2003). Agricultural commodity market controls and trade protection were introduced in 2001, while inputs and food prices were regulated. The parastatal Grain Marketing Board (GMB) monopolised grain buying (GoZ 2001). Genetically Modified Organism (GMO) seeds were actively prohibited and open-pollinated seed was encouraged. Cheap foreign currency for targeted imports was provided to agro-industry. Subsidies also targeted distressed industries, including agro-industries, to improve the supply of inputs to farmers and state farms, as well as to agricultural merchants to enable crop purchases. The variety of state support schemes intended to support the new and existing farmers, state farms, agro-industries and merchants were loosely coordinated in an evolving agrarian reform programme (Table 6.2).

Inflation escalated beyond 400 per cent by 2005 and then hyper-inflation (at over 50 per cent a month) emerged from late 2006. This led to aggressive price controls which fuelled underground markets, at a time when sanctions were escalated. The price controls between 2005 and 2007 now included arresting managers of non-compliant firms. However, capital withdrew goods from formal markets, while private supplies of agricultural inputs and credit continued dwindling and informal markets proliferated.

Table 6.2: Coverage of RBZ agricultural financing schemes

Scheme/Years	Objectives of scheme	Support provided	Targeted beneficiaries	Comments on beneficiaries
Free Government Inputs 2002-2011	Support peasant production	Seed and fertiliser packs	Communal/A1 farmers	
Productive Sector Financing 2004	Provide agricultural credit when private finance declined	Subsidised loans at 25% interest vs. 300% private banks	A2 Farmers	
ASPEF 2005	Enhance food export production	Cheap credit	A2 farms, agro-industry, merchants, state farms	80% of funds targeted A2 farmers
Operation Maguta 2005	Boost food security through command agriculture	Inputs and ploughing support (maize/wheat)	A2 farms and A1 and CA in 2005/06	
Champion Farmer 2008-2009	Boost food security through capable farmers	Inputs subsidy	A2 farms	
Farm Mechanisation 2003-2008	Address labour shortages and expand cropped area	Machinery and equipment for free and on cheap credit	A2, A1 and state farms	Small proportion of large farmers benefitted
Seed supply recovery 2002-2008	Increase area and number of seed producers	Cheap credit; Subsidised forex; Output contracts	Seed producing firms to contract A2 farmers	Relied mostly on new larger-scale farms
Irrigation rehabilitation and development 2004-2011	To resuscitate and expand irrigation	Cheap credit for equipment; Subsidised water and electricity	A2 and state farms	Mostly benefitted A2 farms
ARDA recovery 2003-2006	Increase ARDA cropped areas	Cheap credit; Seasonal land leases	ARDA farms Agribusiness	Agribusiness did not invest cash

Source: Adapted from AIAS research, World Bank (2006); Scoones et al (2010)

From 2005, contract farming was being formally encouraged by the Ministry of Agriculture and the RBZ, which respectively facilitated the tobacco and soybeans contracting and the emergence of new black agricultural merchants by allowing them to retain more of the foreign earnings from exports. When the Look East Policy was escalated from 2005 to diversify sources of foreign loans and markets, at a time when western agrarian merchants had retreated and as liquidity was declining, some concessional loans were secured for imported inputs and machinery. Mechanisation subsidies to counter labour shortages and to expand the areas cropped were escalated from 2006 through such loans and subsidies in local currency.

As food shortages increased and foreign currency earnings declined, import capacity fell and inflation and interest rates escalated, expansionary fiscal interventions escalated through excessive printing of money and the opaque use of parallel currency markets by the state and businesses and hyperinflation skyrocketed. Farming increasingly depended on GoZ finance and credit, although its capacity to subsidise inputs and outputs marketing was limited (*ibid*).

The GoZ increasingly compelled and persuaded capital through various policy measures to increase their production and to support the new farmers. It appealed to new farmers' patriotism to prioritise food production for self-sufficiency (RBZ 2007a), including by introducing a clause in the A2 land lease requiring them to put 20 per cent of their land to food grains and/or beef, depending on their agro ecological location. The state also turned to large agricultural estates, justifying their retention on the grounds of their alleged superior scale economies, productivity and technological advantage and the need to preserve the 'bulky investments' (e.g. irrigation and agro-processing infrastructures) already 'sunk' into the estates (see Sukume and Moyo 2003). Sub dividing the estates and their 'integrated infrastructures' was considered dysfunctional and a source of disputes among new farmers (see Utete 2003). Land tenure insecurity on the estates apparently discouraged investment (EU 2009). Thus, the GoZ sought to encourage production on the large agricultural estates, towards expanding food and agro-fuel production, partly by "allowing" them to retain their land and requiring them to incorporate more black 'outgrowers' into their enterprises. Some remaining estates responded positively to this, *inter-alia* to avoid being perceived as undermining land reform and supporting 'regime change'.

The state had attempted to recover and expand agricultural production on public estates held by ARDA and the CSC estates from 2002, through their own efforts of increasing the area under various seeds, wheat and maize using cheap credit and foreign currency supplied by the Reserve Bank of Zimbabwe (RBZ).

Then, in 'alliance' with the Nuanetsi Ranch owned by the Development Trust of Zimbabwe (DTZ), Masvingo Province authorities and the state began in 2003 to clear some DTZ lands for maize production through a state- contracted Chinese firm. These initiatives floundered due to inadequate financing. In 2005, the RBZ was contracting locally-based food-processing and inputs supply agribusinesses (e.g., National Foods, INNNSCOR, Chemco, Seed Co etc.) to produce seed, wheat and oilseed on ARDA estates. This approach also floundered due to disagreements over product pricing and profit sharing, since the agribusinesses invested little of their own cash, but made profits from 'free' state land and financial subsidies (NERC 2006). In addition, these GoZ leases and sub-contractual production relations did not succeed because most estates required substantial repairs and construction of new dams and irrigation infrastructure, for which the businesses could not secure local financing.

But the agro-industrial estates had always been considered by the state as critical to export growth, employment promotion and agro-industrial development (GoZ 1998). In practice, the decision to preserve them was influenced by declining food and agricultural export production and rising imports, particularly after the 2002/3 drought and as world prices for food and fuel spiked. The large state-owned estates were now expected to fill the production gaps, as national import cover declined. By 2006, a renewed Import Substitution Industrialisation strategy, aimed at reducing fuel imports through local agro-fuels and cutting food imports and dependence on food aid, was emerging. This strategy was also in defence against economic sanctions from and political isolation by the West.

The agrarian reform strategy of resurrecting production on state-owned enterprises was by 2007 shifting towards attracting foreign investment from the East and South (Moyo 2011b). But the reconstitution of large- scale estate farming through the FTLRP and agrarian reform policies evoked competing accumulation strategies among various elements in the new landholding regime, while struggles over the natural resources controlled by estates escalated. A scramble over access to water for irrigation, which the remaining large estates currently dominate, raised wider regional and institutional struggles, involving the private transnational and public estates against the new sugar outgrowers (see EU 2007) and new farmers up stream. This situation called for new forms of state regulation of access to water and the expansion of dams, with the latter recently being led by foreign investors, including through partnership with the public estates. Furthermore, while the central state saw large estates as critical to meeting the import substitution and expanded forex earnings required for national development, contradictions emerged as regional politicians, bureaucrats

and farmers' organisations wanted such resources redistributed under their leadership.

Thus these simultaneously defensive and proactive agrarian policies did not extensively oust capital nor fully socialise production relations. Full change was blocked partly because of the embedded positions of some ruling party leaders and other politically influential actors in capital and because of the rootedness of some commodity production relations. The plan was opposed ideologically and in practise by big business (see Moyo 2011b). Due to conflicting class and political interests, factions of the ruling party elite and other factions of domestic capital and international capital (represented by black nationals) clashed over the allocation of thinly spread and limited public resources and subsidies. These measures affected the interests of opposing classes and politicians, with some seeking to evade or benefit from them.

Planning deficiencies were evident as the heterodox plan was not adequately coordinated, especially in relation to food production and exports. It soon faced implementation problems, including the general evasion of some controls (e.g., of maize marketing) and the countervailing tendencies of 'underground' or 'informalised' trade and petty businesses. Clearly, less of the state's inputs support went to the peasantry as new capitalist farmers were more influential in the distribution process, but a wide spectrum of farmers in various provinces did gain access. Corruption emerged within and outside ZANU-PF as various classes and actors in general competed for access to the subsidies and rents. Patronage often included or excluded both political opponents and supporters. These events widened the fractures within ZANU-PF and fuelled the violent contestation of the mid 2008 elections (Moyo and Yeros 2009).

Facing dramatic economic collapse and a political stalemate over the 2008 elections, political players engaged in negotiations over 'power-sharing' and various policy reforms ensued through SADC mediation. Agreement was reached in September 2008 (GoZ GPA 2008) and an inclusive government was formed in February 2009. By mid 2008, in the midst of negotiations, the economy was being liberalised. Controls on agricultural markets, the capital account and trade and off-budget subsidies were abandoned. Most critically, the economy was 'dollarized' by December 2008 (RBZ 2009). A new recovery plan called Short Term Emergency Recovery Programme (STERP) was issued in May 2009, following two new cash budgets in February and March 2009. But the state's fiscal capacity remained low as it operated a foreign currency cash budget with limited revenue collection and concessional loans, although some new revenues came from diamonds, now mined in joint ventures with the government.

Thus, state- subsidised inputs directed mainly at peasants were retained in late 2009 and this now involved some donors, supplemented by ZANU-PF's 'Well-Wishers Fund'. Subsidised credit through Agribank was resuscitated in 2011. Public and private financing of agriculture remained inadequate, as only 50 per cent of the estimated \$2 billion required for full scale production (Ministry of Agriculture 2011) was being met by the market and the state. Contract farm lending dominated the supply. Securing finance was increasingly being seen as a problem of 'unsecuritised' land tenure, leading some to push for privatised land tenure. Eventually, however, the political parties agreed on tradable leases. Agricultural bonds were by 2010 being raised on the market by state institutions (e.g. Agricultural Marketing Authority) and banks, but for limited amounts (ca. \$20 million) (*Zimbabwe Independent* 2011). Credit provision to salaried farmers was also being considered for A2 farmers, while the mortgaging of cattle for credit was being considered by one bank (TN Bank). However, it was evident that the supply of farm credit would remain insufficient, as the financial system was considered to be 'illiquid'.

By mid-2011, trade protection for grain and oilseed milling firms increased as imports outcompeted local industry. The liberalisation of GMO seed use, ostensibly to improve yields and the competitiveness of grain and soybean producers, was being extensively pushed by capital, some politicians and scientists, while some agro-industries called for protection from imports. A commodity-exchange market was being mooted by large-scale farmers representing blacks and the Ministry of Trade and Commerce.

Foreign investors were now being more readily entertained, but within the 'Indigenisation Policy' framework, requiring domestic control of majority shares (GoZ 2011). Some privatisation of parastatals was initiated (e.g., the ZISCO steel works sold 54 per cent of its shares to the transnational ESSAR from India), but the agricultural parastatals were starved of public funds. Foreign loans were, in 2011, being revived primarily from the east and south, mainly for agricultural machinery and other imports. The West maintained sanctions by restricting International Financial Institution (IFI) loans, while slightly increasing aid, mainly for social services, HIV/AIDS and farm inputs for vulnerable groups.

These policy shifts reflected the changing agency of diverse and farming classes, the renewed influence of capital and new public contestations over agrarian policy which was reverting to more state agricultural financing and trade protection (e.g., see GoZ 2010, Budget Speech). This changing and contradiction-riddled agrarian reform policy- making process shaped various dimensions of the agrarian relations which had been fundamentally restructured by land redistribution.

Changing agrarian production relations

Overall production pattern

Extensive land redistribution is expected to alter the structure and orientation of agricultural production, while passing through a transitional decline in output, as new farmers mobilise resources to establish themselves on the land and as markets and state interventions (particularly the financing mechanisms) adapt to change. Indeed, the output of Zimbabwe's main agricultural commodities started declining in varying degrees from 2002, with some export crops and dairy falling the most, while outputs began to rise selectively from 2006 (Table 6.3). Output declines among those commodities which had been predominantly grown by small-scale farmers, who were not affected by the land transfers, were lower than the declines among commodities grown mainly on large-scale farms and plantations, as the plantations had not been totally transferred. Moreover, the outputs of some commodities, produced predominantly for export with external financing, initially declined, but they recovered after dollarization as more merchants returned. Outputs of peasant-produced food grains targeting the controlled domestic markets were affected by their limited financing throughout the decade, as they depended mainly on the state and faced numerous droughts.

The number of farmers producing diverse commodities and the overall cropped area expanded substantially, although yields generally declined. A new uneven class and regional structure of production had emerged, since the FTLRP restructured Zimbabwe's fundamental agrarian and social relations of production, while consolidating others. However, the dominant discourse has been productionist in focus and pessimistic in its projection of future output. It teleologically expects a successful agrarian reform to emulate the output composition and 'productivity' of the former large-scale white farmers, notwithstanding the heterogeneous nature and interests of the new farming population, producing within diverse agro-ecological conditions. The dominant perspective celebrates the mono-cultural and extroverted large-scale agricultural production system created by the settler-colonial and immediate post-independence state (e.g., UNDP 2008). By underplaying the social context of production, it attributes the changing output mix mainly to the transfers of land from white large farmers to black small farmers, while its understanding of agrarian change narrowly and deterministically focuses on the subjective characterisation of the relative behaviour of former and new farmers.

Table 6.3: Agricultural production trends (crops 000 tonnes): 1990s average versus 2000s

Crop	1990 savg	2002/3	2003/4	2004/5	2005/6	2006/7	2007/8	2008/9	2009/10	2010/11	2011/12
Main foods											
Maize (% change compared to 1990s)	1,684	930 (-44.8)	1,686.1 (0.0)	915.4 (-45.7)	1,485 (-11.8)	953 (43.4)	575.0 (-65.8)	1,242.6 (-26.3)	1,327.6 (-21.2)	1,451.6 (-13.9)	968.0 (-42.5)
Wheat	248	122 (-50.8)	247.0 (-0.6)	229.1 (-7.8)	242 (-2.4)	147 (-40.7)	75.0 (-69.8)	57.9 (-80.7)	41.5 (-83.3)	53.1 (-78.5)	
Small grains	167	373 (123.4)	196.1 (19.0)	65.8 (-60.1)	164 (-1.8)	120 (-28.1)	93.2 (-44.2)	270.2 (64.0)	193.9 (16.1)	156.08 (-6.5)	108.7 (-34.9)
Edible dry beans	5.3	7.1 (34.0)	56.8 (971.7)	21.5 (305.7)	21.5 (305.7)	30 (471.7)	3.8 (-28.3)	37.3 (6.13)	17.2 (224.5)	13.1 (147.2)	10.8 (103.8)
Groundnuts (shelled)	86	86 (0)	64.2 (-24.5)	57.8 (-32.1)	83 (-3.5)	125 (45.3)	131.5 (53.5)	216.6 (154.8)	186.2 (116.5)	230.5 (168.0)	120.0 (39.5)
Oilseeds											
Soya beans	98	41 (-58.2)	85.8 (-12.4)	56.7 (-42.1)	71 (-27.5)	112 (14.3)	48.3 (-50.7)	115.8 (18.2)	70.3 (-28.3)	84.2 (-9.3)	70.5 (-28.1)
Sunflower	43	17 (-60.5)	20.2 (-50.9)	7.4 (-82.0)	17 (-60.5)	26 (-39.5)	5.5 (-87.2)	39.0 (-5.3)	14 (-67.4)	11.5 (-72.1)	6.9 (-84.0)
Key Export											
Tobacco	198	82 (-58.6)	78.3 (-60.5)	83.2 (-58.0)	55 (-72.2)	79 (-60.1)	69.8 (-64.7)	63.6 (-67.9)	103.9 (-47.5)	132.4 (-33.1)	120 (-39.3)
Cotton	201	132 (-34.3)	364.3 (81.2)	196.3 (-2.3)	153 (-23.9)	235 (16.9)	226.4 (12.6)	246.8 (22.8)	172.1 (-14.4)	249.9 (24.3)	254.9 (26.8)
Estate crops											
Sugar	438.9	502 (14.4)	422 (-3.9)	429 (-2.3)	446 (1.6)	349 (-20.5)	259 (-41.0)	259 (-41.0)	350 (-20.3)	332 (-24.4)	372 (-15.2)
Tea	10.6	22.0 (107.5)	22.0 (107.5)	22.0 (107.5)	22.0 (107.5)	13.5 (27.4)	8.3 (-21.7)	11.5 (8.5)	14 (34.9)	20* (88.6)	
Coffee	8.4	8 (-4.8)	5.8 (-31.0)	3.5 (-58.3)	1.3 (-84.5)	0.7 (-91.7)	0.8 (-90.5)	0.5 (-94.0)	0.3 (-96.4)	3* (-64.3)	
Other crops											
Citrus	90	130 (44.4)	130 (44.4)	123 (36.7)	123 (36.7)	123 (36.7)	-	-	-	-	
Vegetables & Melons	149	180 (20.8)	181 (21.5)	161 (8.1)	161 (8.5)	162 (8.7)	-	-	-	-	

Source: Moyo (2011a) derived from Ministry of Agriculture, Mechanisation and Irrigation Development (2010a, 2010b, 2011, 2012), FAO (2008, 2009), World Bank (2006), GAIN Report (2010; 2012), Zimbabwe Tea Growers Association (2010) data, *RBZ (2011) projections.

This a-historical and voluntaristic understanding of social agency has privileged the loss of skilled (white) farmers in explaining production declines, while pointing to presumed deficiencies, such as commercial motivation and organisational traits among new farmers. This is reinforced by a parochial settler-colonial stereotype of what a 'viable' agricultural production model means (Moyo 2002; Cousins and Scoones 2010). More generally, this perspective rests on the dubious teleology that a Junker path of agrarian accumulation, which organises production on a large-scale, is historically the only effective trajectory of development (see Moyo and Yeros 2005); This perspective also overlooks the crisis of social reproduction that has been provoked by this settler-colonial accumulation model (Mafeje 2003).

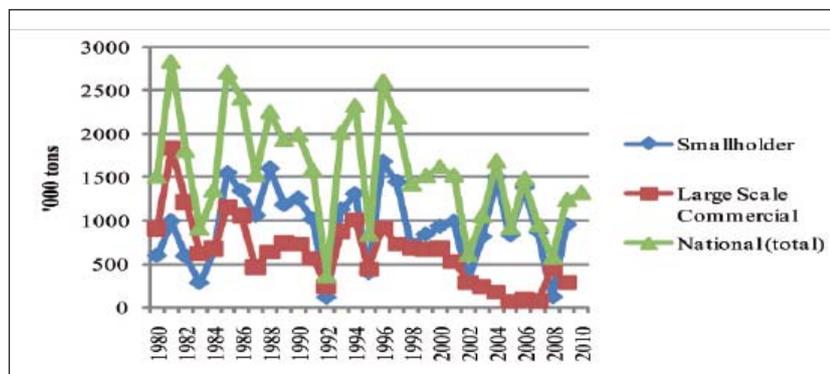
Most analysts underplay the long-run production trends, while non-linear changes in the magnitude and rate of change (decline, stagnation and growth) of the recent outputs of various commodities are not adequately examined, such that the structural factors which underlie the recent changes are ill-understood. There is an empirically dubious tendency to use historical data on outputs based only on formal markets, despite their neglect of peasant (or) informal sector outputs (e.g., Robertson 2011). Furthermore, historical output peaks, rather than average trends, are selectively counterpoised against current 'official' marketed output data, despite the fact that food markets became even more informalised since 2004. Moreover, the systematic changes in the production of various groups of commodities and enterprise mixes, as well as the overall outputs are not sufficiently tracked in relation to changing markets and financing, let alone of their class basis of production.

This tendency arises partly due to the presumed inferiority of small-scale production and commerce and due to lack of data. In fact, few studies (including the state statistical offices with their limited capacity) capture data on the 'informal markets' and associated disaggregated production activities. Indeed, the 'informalisation' of Zimbabwean markets is poorly conceptualised by most analysts, who treat them as an aberration reflecting deviant behaviour (e.g., *Kiya kiya*), which allegedly is deliberately created by the 'destructive economic policies of ZANU-PF' for their patronage-based accumulation (Raftopolous 2010). These reductionist approaches also fail to periodise dynamic changes in production and policy context, limiting their ability to decipher the forces which have shaped the actual output trends.

Expansion of food production among the peasantry

The output of maize, Zimbabwe's main staple grain produced mostly by peasants, declined severely in an erratic long-run pattern associated with droughts (Fig. 6.1). National maize yields per hectare fell to about 50 per cent of the 1990s average (Fig. 6.2), while the average yields of A1 maize producers were half those realised by A2 producers and land beneficiaries in wetter agro-potential areas realised twice the yields of those in drier regions (AIAS 2007).

Figure 6.1: Sub-sectoral maize production trends (1980–2010) in Zimbabwe

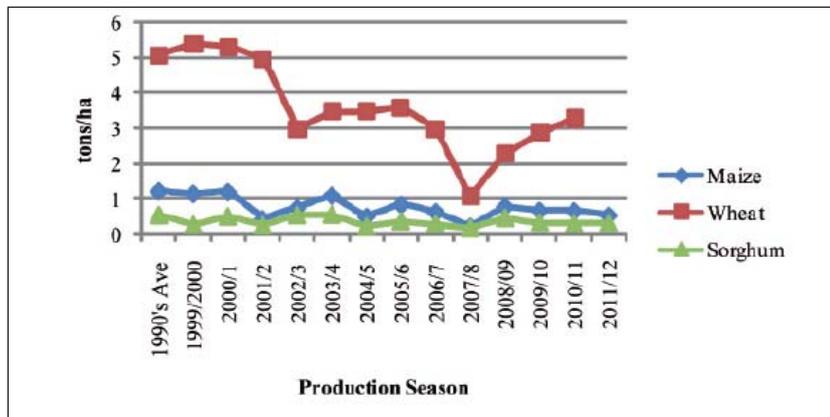


Source: MAMID (2010a, 2010b)

However, the output of small food grains such as sorghum and millet increased (Fig. 6.3), although their average yields fell 40 per cent below the 1990s average (MAMID 2010a). The output of wheat, which before 2000 was predominantly grown by large-scale farmers, declined dramatically (Fig. 6.2) and the area cropped to wheat fell from an average of 58,000 hectares in the 1990s to 18,200 hectares in 2010. Wheat output had already started rebounding in the 2005/6 season, as a consequence of concentrated provision of subsidised inputs by the government, only to deteriorate dramatically from the 2006/07 to the 2010/11 season, on account of loss of input subsidies and a sharp deterioration of electricity supply for irrigation.

Thus, the long run per capita production of cereals and maize (per capita and in absolute volumes) has been declining since the mid-1980s. Per capita cereal production on average ranged from 300kg/person during the 1980s, only to dip to 60 kg/person and 85 kg/person in 1992 and 1995 respectively. Actual national and per capita production of cereals has not been able to satisfy the needs, particularly of the recommended levels of per capita calorific requirements. Per capita maize production in Zimbabwe has never reached the 1982 level, when the country first attained a bumper crop.

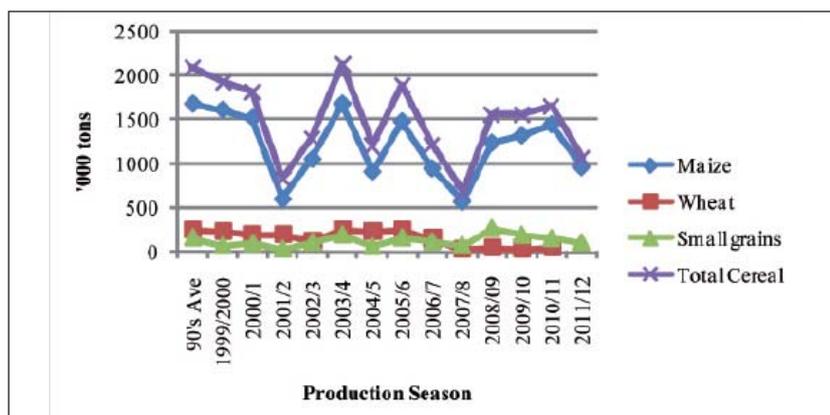
Figure 6.2: Yield trends for main cereal crops



Source: MAMID (2010a, 2010b, 2011, 2012)

However, the numbers of food grain producers expanded after the Fast Track Land Redistribution Programme, leading to a major increase in the national cropped area dedicated to food grains from 1,794,527 hectares in 1999 to 2,655,687 hectares by 2011 (MAMID 2010a). Land reform beneficiaries dedicated 78 per cent of their cropped land to food grains (Moyo et al 2009). This shifted the orientation of production and use of prime lands away from exports to the staple grains prioritised by peasants.

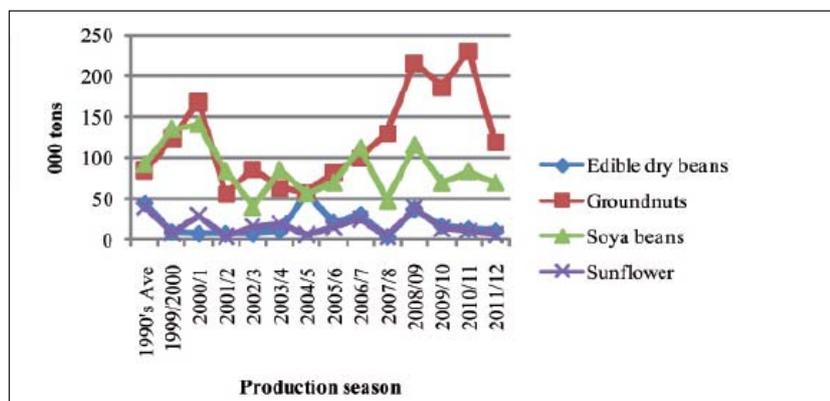
Figure 6.3: Cereal crops output: 1990s vs. 2000s average



Source: FAO (2009), MAMID (2010a, 2010b, 2011, 2012)

The outputs and cropped areas of oilseeds such as soyabeans and sunflowers, which target the home market, but were mainly produced by large-scale farmers before 2000, also declined, but later they experienced a limited up-turn (Fig. 6.4). The output of groundnuts and edible beans, however, increased as a result of growth in area planted and these crops continued to be grown mainly by peasants. However, the average yield of the groundnuts has remained relatively unchanged at 0.488 tonnes, whereas that of soyabeans declined from 1,746 tonnes to 1,514 tonnes at the end of the 1990s and 2000s respectively.

Figure 6.4: Oilseed and dry beans output: 1990s vs. 2000s average

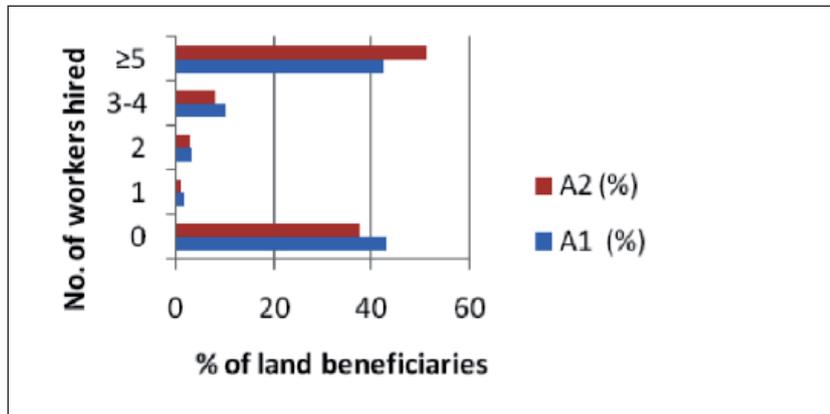


Source: FAO (2009), MAMID (2010a, 2010b, 2011, 2012)

About 21 per cent of the land beneficiaries grew groundnuts, while around 6 per cent of them grew beans and soyabeans (Moyo et al 2009). This suggests that the numbers of higher-value food producers has expanded and that peasant production is diversifying.

Resilience of export oriented production?

In terms of financial value, the largest share of agricultural output decline occurred among export commodities which had been predominantly produced on large-scale landholdings. In 2004, tobacco output had fallen by 72 per cent from the 1990s average (Fig. 6.4), but by 2011 its output was rising substantially (Fig. 6.5). Its yields and planted area declined by 55 and 20 per cent respectively during the period and fertiliser utilisation per hectare was halved by 2004 (TIMB 2010, MAMID 2011). But over 50,000 farmers, including 30,000 peasants, were now producing tobacco on smaller cropped areas, compared to about 700 large-scale and 3,500 small producers in 2002 (TIMB 2010, MAMID 2011).

Figure 6.5: Key exports' output trends: 1990s average vs. 2000s

Source: TIMB Statistical data (2010), Cotton Ginners Association (2010), MAMID (2011, 2012)

The A2 farmers were realising higher yields as they used more inputs (Moyo et al 2009). Some remaining white farmers continued to produce tobacco. The output of cotton, which was largely exported and was predominantly produced by small farmers, surpassed the 1990s average by 49 per cent by 2011 (Fig. 6.5). This reflects a sizeable expansion of small-scale producers in a commodity, whose production was already entrenched and which was attractive since cotton has high tolerance of drought and since there was a continuity of contract-based inputs supplied by capital. On average, 4 per cent of the land beneficiaries grew-cotton, while 21 per cent grew it in Chiredzi District, despite its limited cotton-growing history (Moyo et al 2009). Established agro-industrial production structures and technocratic wisdom were being challenged by farmers in the new milieu (see also Scoones et al 2010).

The outputs of plantation export commodities only began to decelerate in 2004, but these were rising by 2011. Sugar output fell by 20 per cent in 2006 from the 1990s' average levels and then by 50 per cent during the hyperinflationary conditions between 2007 and 2008, only for the rate of decline to decelerate by 2011 (Fig. 6.6) (EU 2009; RBZ 2011). The structure of sugar production barely changed as the area cropped by the estates was hardly reduced, while the outgrowers' cropped area declined substantially (EU 2009; RBZ 2011).

The sugar production decline was allegedly due 'to the effects of the Land Reform process and to a lesser extent the effects associated with the present

economic and inflationary conditions in Zimbabwe' (EU 2007: ii). Since production had declined mostly among outgrowers, the volatile currency markets and inflation had led to reduced supplies of inputs subcontracted to them by the estates. Sugar export prices were also deteriorating with the EU reforms leading to a 67.5 per cent reduction of raw sugar prices between 2005/6 and 2010 (ibid), while the prices of imported fertilisers and transport fuel rose during the same period. There was a slight shift in land use by the black outgrowers away from sugar towards food production for family consumption and sale and by 2006 they increasingly focused on maize, millet, beans, vegetables and cotton (Scoones et al 2010; EU 2007).

Large-scale estate production of sugarcane was mainly undertaken by Hippo Valley Estates and Triangle Limited, which were established over five decades ago.⁵ Together they produced over 70 per cent of the country's sugarcane, while two groups of middle-scale farmers, white large-scale commercial and newly-resettled black farmers, produced the remaining 20 per cent of the country's sugarcane (GAIN Report 2010). There were about 47 whites with an average of 147 hectares each in 2000, whose landholdings were parcelled out to about 560 black farmers by 2007 with average hectarages of 10 to 30 hectares (Moyo 2011b). The sugar milling capacity of these two estates is 600,000 tonnes per year which was realised before 2006, while there are plans to upgrade the two mills to increase production capacity to 820,000 tonnes per year and to restore production levels from just below 300,000 tonnes per year to the past peak and expand this to the planned capacity. Triangle Sugar Limited produced under 300,000 tonnes of raw sugar between 2007 and 2010 and employed over 9,000 people. Approximately 90,000 tonnes are refined for local consumption (EU 2009), while the bulk of the output is exported as sugar and alcohol products.

Sugar production is set to increase as a result of expansion in the area planted from 2011 due to new investments by Hippo Valley estates, targeted at rehabilitating the outgrower schemes and also by Green Fuels, targeted at producing agro-fuels (Table 6.4). Large-scale agro-fuel (ethanol) production from sugarcane is concentrated in the south-eastern lowveld of the country, where the long established estates revived its production in 2007, while the recently set up sugarcane plantations on the ARDA and DTZ were expected to be in production by 2011. Together, these will account for over 80 per cent of the total agro-fuels produced in Zimbabwe in terms of land in production and the targeted area. Thus, the planned area to be allocated to sugarcane for ethanol is over 150,000 hectares, comprising over 60 per cent of all the

estates' land with Zimbabwe's sugar industry considered to be the lowest cost producers in the world, due to the 'excellent growing conditions in the lowveld and highly efficient processing performance by its factories' (ibid.: ii).

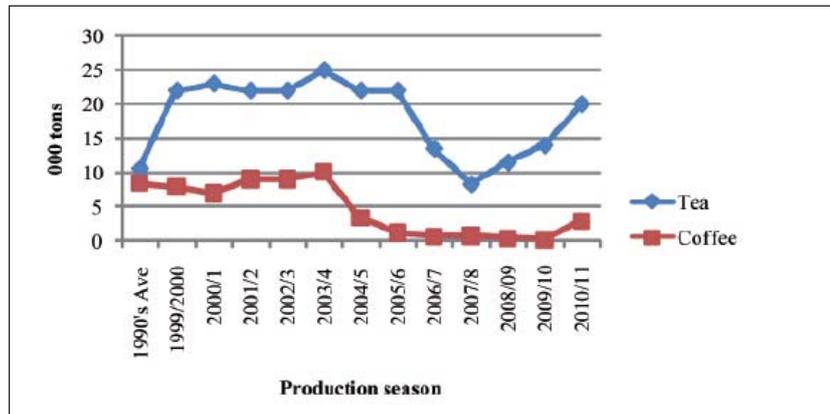
Table 6.4: Estate agro-fuel production

Model Type	Project Name	Location	Production				
			Crops	Confirmed Area (ha)	%	Targeted Area (ha)	%
Private Sector Estates	Triangle Ethanol	Chiredzi	Sugarcane	40,912 ⁶	18.3	40,912	12.7
Parastatals	ARDA Biofuels	Chipinge	Sugarcane	40,000	17.9	50,000	15.6
Public/Private Estates	Zimbabwe Bio Energy	Nuanetsi Ranch	Sugarcane	100,000	44.8	100,000	31.2
Sugarcane Out-growers	Triangle Ethanol	Chiredzi	Sugarcane	7,200	3.2	10,000	3.1
Total				188,112	84.3	200,112	62.4

Source: Compiled by AIAS from various sources

The number and area of large-scale farm and estate producers of coffee and tea had also declined by 2006, but tea output patterns were anomalous compared to other crops. Over 86 per cent of the tea was produced by the large-scale and estate producers, with the rest produced by 100 white and black outgrowers and the state estate (ARDA Katiyo). By 2010, tea output levels were well above the 1990s averages, but this level was lower than the peak reached prior to 2007 (Fig. 6.6).

Meanwhile coffee output had declined by over 90 per cent in 2010, with its cropped area falling by over 30 per cent, mainly among the outgrowers, whose numbers almost doubled.⁷ Remaining tea estates were now diversifying production towards macadamia nuts, pineapples and passion fruit, ostensibly due to labour shortages and lower prices, while outgrowers in tea and sugar growing areas were also producing some foods due to input shortages (EU 2009; USAID 2010).

Figure 6.6: Tea and coffee output trends in Zimbabwe

Source: IMF (2005), Zimbabwe Tea Growers Association data (October 2010), Zimbabwe Coffee Mills data

Soon after 2001, the exotic timber-producing companies (e.g. Border Timbers) stopped planting new trees, apparently because the 'illegal land occupations supported by big politicians' had brought uncertainty to their land tenure (Abu-Basutu 2010). Timber (sawn) outputs decreased from 374,779m³ in 1998/99 to about 194,181m³ in 2008/09, with over 90 per cent of this production coming from the core estates (Timber Producers Federation 2009).

The FTLRP did not directly lead to a substantial loss of formal waged agrarian labour among the estates, because most of their core production land had not been redistributed and they also retained most of their permanent workforce. When the high inflation conditions reigned, however, estate labour wages deteriorated further as plantation commodity prices fell. As a result, labour shortages increased (see Chambati and Moyo 2009) and labour emigration ensued. Agrarian reform had not fully overhauled the exploitative large-scale agrarian labour relations.

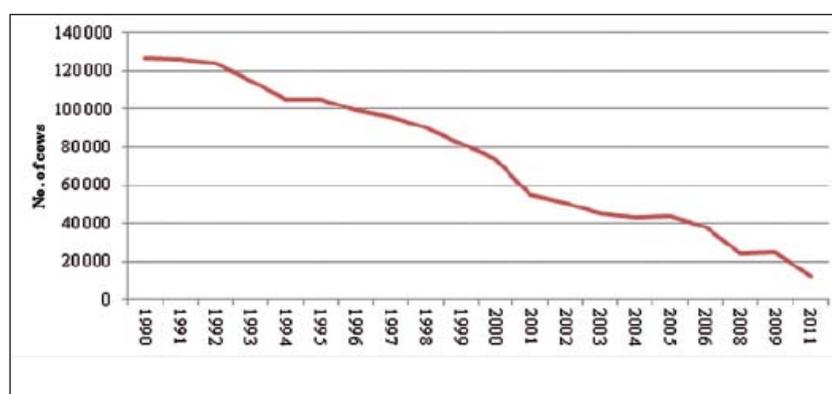
The production of formally-marketed dairy and beef was previously dominated by large-scale farms. The national cattle herd fell by 19 per cent by 2009 (Table 6.5). Most cattle are now held by many smaller-scale and middle-scale farmers practicing mixed farming and provide various foods, draught power and manure. Yet 58 per cent of the land beneficiaries had no cattle, 36 per cent had three and above and the rest had one to two beasts (AIAS 2007). However, 70 per cent of the surveyed households which had cattle were in drier agro-ecological regions, officially considered ranching areas (AIAS 2007).

Table 6.5: Cattle numbers by farming sector: 2001 – 2012

Sector	2001	2003	2005	2009	2011	2012
A2/LSCF	1,291,110	453,418	519,028	442,080	453,385	509,455
Communal	4,398,081	3,994,830	3,604,361	3,692,196	3,529,739	3,633,777
Resettlement & A1	505,360	717,969	844,800	919,616	1,020,070	899,608
Small scale	23,565	180,648	219,424	167,828	147,559	198,352
Total	6,418,116	5,296,865	5,187,613	5,221,720	5,156,753	5,241,192

Source: MAMID (2010a, 2010b, 2011, 2012), FAO (2009)

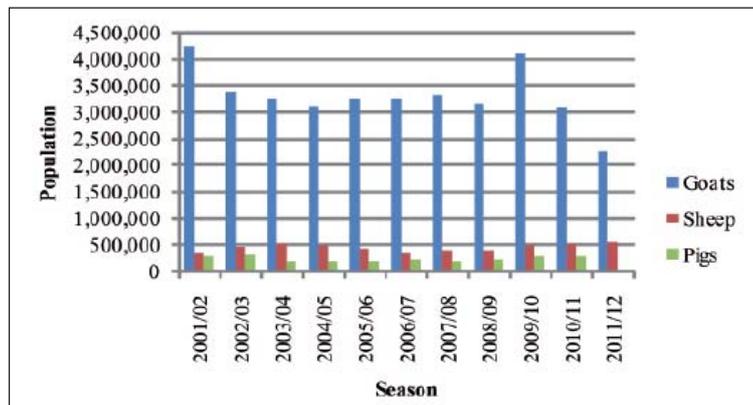
Dairy herds had already declined from their peak of 191,000 cows in 1991 to about a third by 2001, on account of the reduced profitability of dairy farming. The decline had accelerated dramatically by 2004 with breeding stock losses having been high and herd replacement slow. Milk output also fell by 66 per cent from 2001 to 2010 (MAMID 2011). The actual number of dairy cows declined continuously (Fig. 6.7) and sharply from 1990, such that the decline during the first decade of the twenty-first century was relatively slower in intensity. However, this decline is significant in effect since much of the breeding stock and the size of improved breeds also declined. Consequently, while the trends in the production of milk between 1995 and 2001 were relatively minor, between 2002 and 2010 the volume of milk output fell almost three-fold from above 200 million litres in 1995 to less than 50 million litres in 2010. Production in the dairy sub-sector is thus one of the worst performing sectors.

Figure 6.7: Dairy cows, 1990 – 2011

Source: Derived from MAMID (2011, 2012)

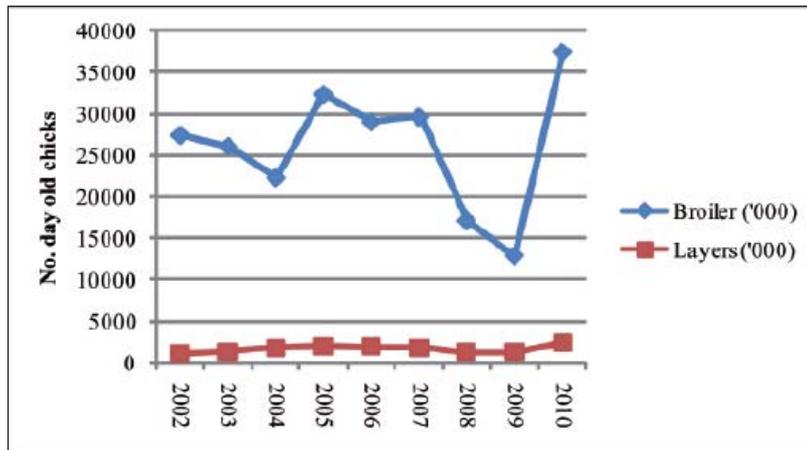
There were rapid declines in pork production by 2005, but pork output had risen substantially by 2009, while the numbers of goats were stable compared to sheep, which are not a common food (Fig. 6.8). Less than 25 per cent of the land beneficiaries had small ruminant livestock, while 2 per cent of them had piggeries by 2006 (MAMID 2011). Formally-marketed pork production was previously dominated by over 100 LSCF producers and agro-industrial plants, but by 2010 it involved over 250 smaller producers.⁸ Overall, the diversification of livestock producers was accompanied by lower quality, lower breeding stocks and lower calving rates, since investments in breeding, animal health and pen-feeding had declined (FAO 2009).

Figure 6.8: Small stock production



Source: MAMID (2010b, 2011, 2012)

Poultry production, both for egg and meat, expanded during the FTLRP period until 2007, when the production of chicks by key producers (Hubbard Zimbabwe, Irvines) declined, resulting in their importation from South Africa. The shortage of stock feeds due to limited availability of raw materials also affected poultry production. However, chick production (Fig. 6.9) and feed availability recovered in 2009 due to the removal of exchange rate and commodity controls in 2008 (e.g., maize, a key raw material for stock feeds).

Figure 6.9: Poultry chicks production trends

Source: Derived from the Zimbabwe Poultry Association (2010)

Diversification of the agricultural and non-farm livelihoods production base

In general, agricultural production patterns during the 2000s became more differentiated in class and regional terms, while export-oriented output rose faster than food. The production base was restructured by introducing more producers into all commodities and expanding the overall cropped area substantially, despite the decline of yields for most crops and livestock. Numerous producers earned farming incomes and provided their own food. A process of income re-distribution was underway, although this favoured an expanded range of middle-to larger-scale farmers, mainly in wetter regions. While more farmers were now producing exports, they were, however, well below 15 per cent of all the farmers.

Average land utilisation rates among land beneficiaries were at 40 per cent (AIAS 2007), comparing favourably with former large-scale farming areas (World Bank 1991). By 2006, about 54 per cent of the beneficiaries cropped less than three hectares, while only 14 per cent cropped more than 10 hectares (Table 6.6). Thus middle-scale and larger-scale landholders cropped proportionately less land than the peasants. Their pre-2000 counterparts usually cropped below 700,000 hectares, despite employing more formal labourers (World Bank 1991).

Table 6.6: Total cropped area by farm size in selected new resettlement areas

Cropped area (ha)	Farm sizes (ha)											
	1-19		20-49		50-99		100-299		300+		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%
0	177	18.8	122	19.8	30	16.3	49	27.5	11	37.9	389	19.9
0.1-1	90	9.5	44	7.2	13	7.1	27	15.2	-	-	174	8.9
1.1-3	285	30.2	145	23.6	27	14.7	37	20.8	3	10.3	497	25.5
3.1-5	222	23.5	105	17.1	24	13.0	23	12.9	3	10.3	377	19.3
5.1-10	97	10.3	92	15.0	40	21.7	12	6.7	-	-	241	12.4
10+	73	7.7	107	17.4	50	27.2	30	16.9	12	41.4	272	13.9
Total	944	100.0	615	100.0	184	100.0	178	100.0	29	100.0	1950	100.0

Source: AIAS Household Baseline Survey (2007)

While before 2000, agricultural production was predominantly export oriented, the incomes realised were concentrated among a few large farmers, alongside domestic and foreign capital. Peasants cropped much more land and used more labour towards producing various foods largely for auto-consumption. The latter trajectory has been consolidated, but land and labour productivity continue to be low. Consequently, domestic food production has, on average, been 35 per cent short of requirements, with wheat, soyabeans and dairy faring worst, while the output of pulses has expanded. Zimbabwe continues to have some relatively more secure-food enclaves, reflecting uneven production and productivity patterns. Small producers in the southern districts continue to face regular grain deficits, while those in the wetter regions increased their production of pulses and cash crops, particularly tobacco and various vegetables.

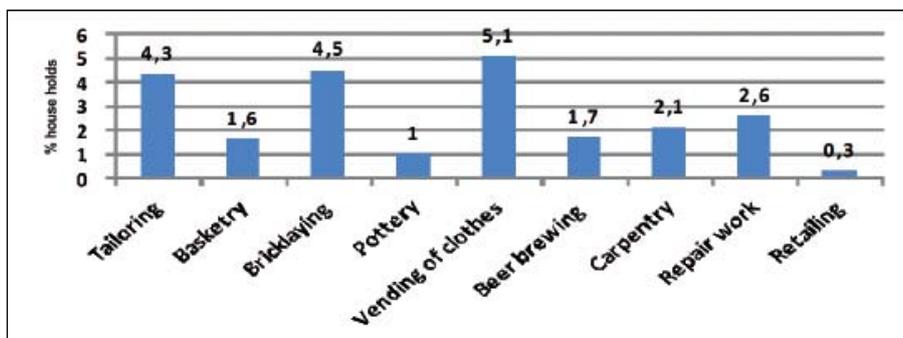
Class and regional biases in the capacities of various farmers to produce relatively larger areas of high-value crops and export commodities are being reproduced. A broader base of capitalist farmers has emerged, while the plantations are consolidating their vertical integration into world markets using more outgrowers. More peasants and middle-scale producers are now slowly expanding the supply of more diverse foods and raw materials to the home and export markets. This expansion also entails the reinsertion of large foreign capital into Zimbabwe's restructured agrarian markets.

In addition, various non-farm production and employment activities have emerged as a result of the opening up of the previously monopolised LSCF land. These non-agricultural land uses centred around farm tourism, small-scale mining, petty entrepreneurial activities, small trading businesses and industrial activities. The provision of over-night accommodation in lodges or chalets was found on 11.7 per cent of the farms surveyed, with 58 per cent of those in Chiredzi, endowed with wildlife conservancies which attracted more tourists prior to the FTLRP (AIAS 2007). In the Goromonzi and Zvimba districts, overnight accommodation facilities were found on 7.4 and 1.3 per cent of the surveyed farms respectively. Crocodile farming was another non-agricultural land use reported by key informant interviews, albeit on a low scale, as only one farm in Kwekwe was reported to be involved in crocodile farming.

Gold panning, which is associated with higher income rewards, was the most common natural resource exploitation activity for monetary gains reported by 5.8 per cent of the land beneficiaries and was more common in districts endowed with alluvial gold resources such as Kwekwe (11.3%) and Mangwe (46.9%). Districts such as Chipinge and Zvimba had fewer (0.3%) households involved in panning (*ibid*).

Besides natural resources exploitation activities, households were also involved in other petty entrepreneurial activities such as vending of new and second-hand clothes (5.1%), bricklaying (4.5%), tailoring (4.3%), repair works (2.6%), carpentry (2.1%), brewing of traditional beer for sale (1.7%), basketry (1.6%) and pottery (1%). Operation of small tuck-shop businesses was reported by an insignificant proportion (0.3%) (Fig. 6.10). Despite the low level of participation by the newly resettled farmers (less than 6%), all of these non-agricultural income-generating activities were more common in the A1 sector than in the more commercially oriented A2 farming sector (*ibid*).

These activities were spatially distributed in terms of availability of either a market or raw materials. In Chipinge, 5 per cent of land beneficiaries were involved in the vending of new and second-hand clothes. Basketry dominated in Chiredzi (7.2%) due to the availability of raw materials (ilala palm), which grow well in the hotter and dry lowveld conditions. Beer brewing is common and most pronounced in Chiredzi (9.4%), owing to the availability of raw materials (sugar, sorghum and ilala palm fruit), when compared to all the other districts, where less than 1.5 per cent of the households are involved in the activity.

Figure 6.10: Non-agricultural activities by resettled farmers

Source: AIAS Baseline Survey 2005/06, household questionnaire, N=2089

Small trading businesses were mostly found in areas nearer city centres such as Goromonzi and Kwekwe districts (which had 0.7 and 0.3 per cent of the households operating these). Industrial activities such as tractor and motor vehicle repairs were practiced by 3.5 per cent of the land beneficiaries and were more common in the A2 scheme (5.7%) than in the A1 scheme (2.9%) (ibid). Chiredzi District had the highest proportion of land beneficiaries engaged in industrial activities on the farms (13.6%), whilst participation in other districts tended to be below 2 per cent.

Differentiated access to agricultural inputs and markets

Overall productivity trends

Agricultural productivity generally declined due to reduced and uneven access to inputs and output markets. This poor access particularly affected smaller producers, who nonetheless deployed their labour to expand cropped areas. Access to inputs was also constrained by reduced public and private agricultural finance, leading to the diversification of input supply and commodity marketing arrangements by capital.

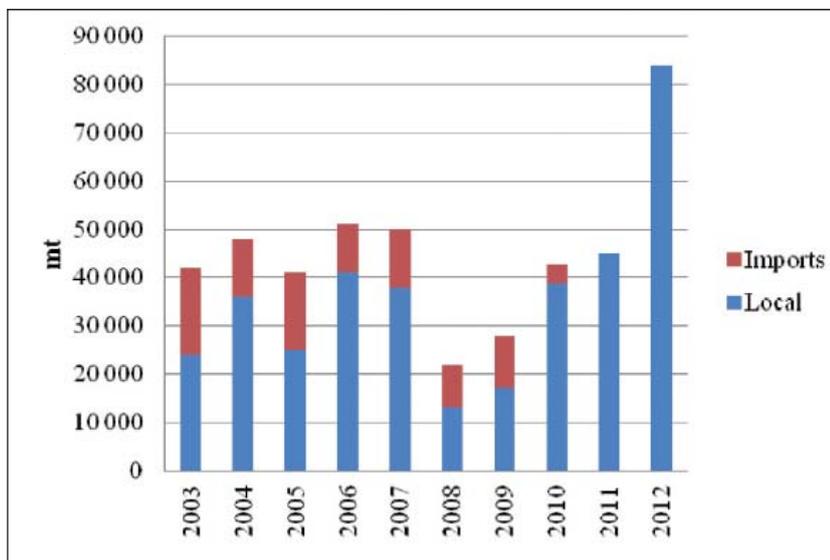
Limited and uneven access to agricultural inputs

Maize seed, particularly-locally produced seed, was in short supply during 2003 and 2009 and seed imports were required to meet the optimal national seed requirements of around 60,000 tonnes (Fig. 6.11). However, maize seed production had recovered to the full domestic requirements by the 2010/11 season (Table 6.7). Three transnational companies (Seed Co., Pannar and

Pioneer) had dominated hybrid maize seed production by 1999 through contracts with about 200 larger-scale growers whose land was redistributed. By 2010, numerous medium and large-scale farmers were being contracted to produce seed, unravelling the previous oligopoly. The seed companies prefer to deal with larger growers, ostensibly on account of their better ability to provide the required spacing and deal with the complex processing requirements of seeds.

Figure 6.11: Maize seed supply (2003-2012)

Source: Seed Co (2011) data; AMA (2012) data



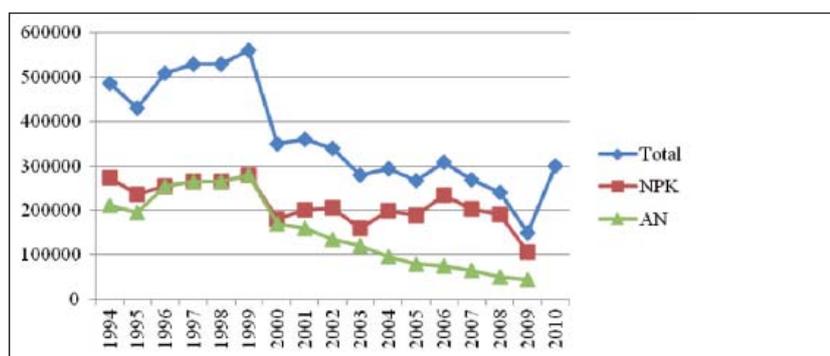
Similarly, many more middle-scale farmers were producing tobacco seedlings and meeting current demand (TIMB 2010). Shortages of potatoes and vegetable seeds persisted, leading to supplementary imports. By 2011, over 80 per cent of all the farmers were using commercial hybrid seeds now grown by more farmers contracted to capital, which retained dominance in the privatised bio-genetic industry.

Table 6.7 Maize seed delivery patterns, 2000 - 2011

Year	Maize seed delivery patterns (tonnes)		
	Hybrid seed	OPV seed	Total
2000/01	28187	0	28187
2001/02	17677	1132	18809
2002/03	14811	1693	16504
2003/04	23722	1555	25277
2004/05	14512	428	14940
2005/06	21726	315	22041
2006/07	16393.2	9.1	16402.3
2007/08	6283.4	34.4	6317.8
2008/09	7678.2	128.5	7806.7
2009/10	23460.4	641	24101.4
2010/11 Estimate	31887	317	32204

Source: Seed Company of Zimbabwe data (2011)

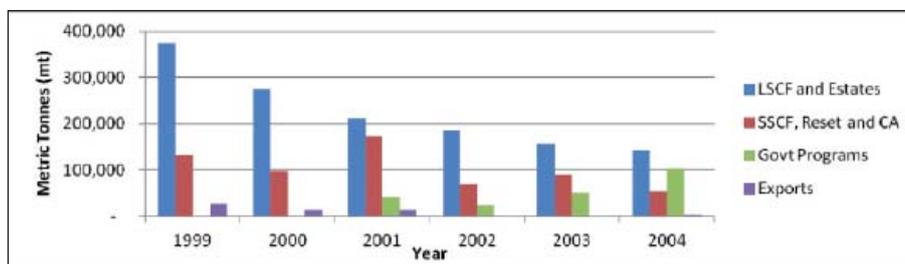
Fertiliser consumption in Zimbabwe has been declining since 2000 (Fig. 6.12). Its application in the 1990s averaged 30 kg/ha. This average was halved by 2004 (FAO 2009) and applied to larger cropped areas. By 2006, 50 per cent of the land beneficiaries were utilising inorganic fertilisers, mostly for maize, tobacco and cotton production, with relatively more A2 beneficiaries using fertilisers, while 20 per cent of these used pesticides (Moyo et al 2009). The use of fertiliser in the other crops (wheat, soyabeans and sunflowers) was generally limited to below 25 per cent of the producers (ibid). The wetter agro-ecological regions used more fertilisers.

Figure 6.12: Fertiliser consumption trends

Source: Chemplex Corporation from MAMID (2010c)

Nationally, less fertiliser was applied by small farmers than by the larger farmers (Fig. 6.13). Export crops used the largest share (Tripathy et al 2007). Most A1 farmers were using animal manure rather than fertilisers (Moyo et al 2009), bearing in mind the rise of inputs prices globally (Moyo 2010). Less than 10 per cent of farmers also adapted to the rising price of inputs and access problems by adopting conservation farming to optimise absorption of water and fertiliser (FAO 2011).

Figure 6.13: Sub-sectoral utilisation of locally produced fertilizer



Source: Triparthy et al (2007)

The use of productivity-enhancing inputs on livestock was mainly found in the drier southern provinces. Of the land beneficiaries, 12 and 21 per cent used stock feeds and veterinary chemicals, respectively, although 34 per cent of the pork producers used them (Moyo et al 2009). Only 35 per cent of the cattle producers used public dipping and veterinary services, with slightly more A1 beneficiaries using public dips (Moyo et al 2009). This low usage limited livestock productivity. The re-insertion of large capital in the livestock sector was relatively limited because of the continued and dispersed control of breeding stock by former large-scale farmers and the pervasiveness of uneven regional investment.

Agricultural production continues to depend mainly on rain-fed farming. Only 5 per cent of the national cropped lands are irrigated and plantations control 57 per cent of this amount, while small producers control 30 per cent (World Bank 2006). About 17 per cent of the land beneficiaries had one form of irrigation facilities, while 28 per cent of the A2 farmers had irrigated crops compared to 14 per cent of A1 farmers and only 10 per cent of both groups had invested in irrigation (Moyo et al 2009). Irrigation was slightly more common in Chipinge and Chiredzi (Moyo et al 2009), where more irrigation facilities were pre-existing on plantations. Some irrigation facilities were disabled by departing landowners and land occupiers and numerous dams remain underutilised (World Bank 2006). This uneven class and regional distribution of irrigation facilities is also associated with the decrease in export production.

Agricultural productivity is also constrained by low and uneven access to farm machinery. Most peasants still depend on labour-intensive ox-drawn traction and hand weeding. Only 49 per cent of the land beneficiaries had access to animal-driven ploughs, while less than 20 per cent had access to power-driven equipment, with only 6 per cent of the A1 beneficiaries having access to tractors, compared to 36 per cent of the A2 farmers (Moyo et al 2009). Over 70 per cent of the A2 farmers who used tractors owned them (*ibid*). Small landholders owned less than 22 per cent of the national tractor fleet, farm equipment and machinery (MAEMI 2009). Public or private draught power hire services are limited and the government's mechanisation programme added only 3,217 tractors to the national stock (MoF 2010). During the early 2000s, limited fuel subsidies were provided, but these mainly benefited A2 farmers.

About 30 per cent of the land beneficiaries had on-farm and off-farm infrastructure, including some left on the redistributed farms (Table 6.8). Some A1 farmers shared farm houses and stores for social services, while A2 farmers gained these individually. Given the limited availability of credit, these investments are significant. Investments made were also regionally differentiated (Table 6.9). While access to subsidised inputs during the 2000s reached diverse farmers, the outcome favoured larger-scale export farmers with better access to markets (AIAS 2007). Thus, only some resource-rich farmers had access to inputs and this limited the capacity of most to hire labour (see Chambati 2011) and invest.

Table 6.8: Productive investment in newly-resettled areas

Type of investment	A1 model		A2 model		Total	
	No	%	No	%	No	%
Homestead	1089	66.0	206	47.0	1295	62.0
Irrigation equipment	168	10.2	48	11.0	216	10.3
Farm equipment & machinery	111	6.7	39	8.9	150	7.2
Storage facilities	123	7.5	30	6.8	153	7.3
Livestock	200	12.1	79	18.0	279	13.4
Tobacco barns	22	1.3	6	1.4	28	1.3
Electricity	5	0.3	2	0.5	7	0.3
Worker housing	123	7.3	62	14.2	185	8.9
Plantations & orchards	12	0.7	2	0.5	14	0.7
Environmental works	18	1.1	5	1.1	23	1.1

Source: AIAS District Household Baseline Survey (2005/06); N=2089

As of 2011, the capital intensity of farming was uneven and influenced wider agrarian relations. Those few larger-scale farmers using motorised traction included both high and low-intensity labour hirers, while the majority hired little labour and were poorly capitalised (see Chambati 2011). Class biases in the control of land, labour and access to markets have no doubt also been shaped by unequal political connections and social status, as well as the re-configuration of such markets.

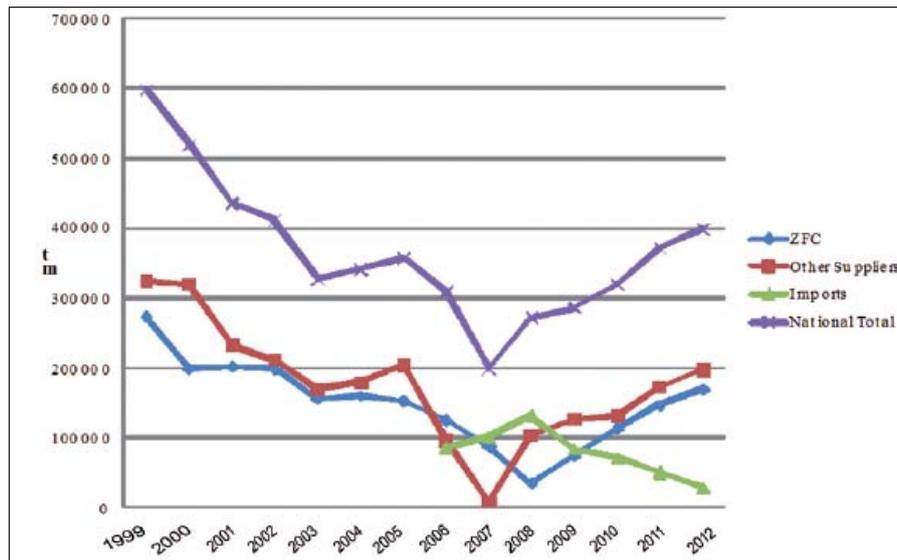
Table 6.9: Investments made by farmers – Qualified gross table (excluding shelter)

Investments made by-farmers	District of study													
	Chipinge		Chiredzi		Goromonzi		Kwekwe		Mangwe		Zvimba		Total	
	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%	No.	%*
Water & irrigation facilities	48	2.3	14	0.7	109	5.2	24	1.1	3	0.1	7	0.3	205	9.8
Farm structures	94	4.5	46	2.2	71	3.4	116	5.6	33	1.6	99	4.7	459	22.0
Farm equipment & machinery	29	1.4	7	0.3	26	1.2	45	2.1	8	0.4	22	1.1	137	6.6
Plantations & orchards	5	0.2	2	0.1	-	-	3	0.1	3	0.1	-	-	13	0.6
Environmental works	4	0.2	-	-	1	-	16	0.8	-	-	2	0.1	23	1.1

Source: AIAS Baseline Survey (2007); Notes: * N=2089

The reconfiguration of agrarian markets

The production of farm inputs such as fertilisers by domestic industry was also falling by 2003, as were imports (Fig. 6.14). Many agro-industries did not adapt to the changing demand structure. Agrarian merchants and fertiliser producers reduced local operations and increased operations in neighbouring countries. As interest rates rose, agri-business increasingly depended on subsidised foreign currency and credit in exchange for reduced prices and turned to manufacturing inputs on pre-paid contracts for large-scale exporters.

Figure 6.14: National fertilizer supply (2001 – 2012)

Source: Compiled by AIAS from Zimbabwe Fertilizer Company (ZFC) 2010 data.

More fertiliser and tractors were imported from China and Iran through concessional loans and from South Africa and elsewhere in cash. New indigenous importers were contracted to supply government input schemes. Similarly, domestic producers and suppliers of machinery and implements increased supplies when contracted by the government (See RBZ 2007a). This led to the recovery of some agro-industrial capacity (CZI 2010). Often, however, these schemes were alleged to have fiddled with prices, quality and distribution.

By 2006, 30 per cent of the A1 land beneficiaries relied on subsidised seed, compared to 20 per cent of A2 beneficiaries, while in high potential districts such as Chipinge, 50 per cent relied on subsidised seeds, compared to 9 per cent in remote Chiredzi (Moyo et al 2009). Between 68 and 87 per cent of the land beneficiaries, depending on the district, purchased their inputs in markets (Moyo et al 2009). A marginally larger proportion of A2 compared to A1 farmers benefited from government inputs. Over 96 per cent of the few land beneficiaries who used agro-chemicals for cotton and tobacco production bought them in markets. Similarly, less than one per cent of the land beneficiaries received government livestock inputs, aside from dipping services. International donors played a limited role in subsidising inputs until 2009. However, while such state subsidies were limited in scale, the level of support substantially surpassed that provided during the 1990s.

Formal cattle markets, whose exportation had substantially declined by 2004 due to reduced slaughters and livestock disease, became spatially and socially disaggregated. By 2010, meat trade increasingly involved direct sales between producers and new abattoirs, retailers and consumers (Scoones et al 2010). Livestock production on input sub-contracts and leased grazing created new tied markets (Zvimba Field Observation 2008⁹).

Government support for grain marketing also increased as compared to the ESAP era, but its monopoly became unsustainable. Grain procurement relied on limited subsidies and expensive credit, while the grain sold to millers was highly subsidised. Small millers mushroomed in tandem, competing and colluding with established large agribusiness to hike prices (News24 2003). Meanwhile, farmers received low prices for their grain and the payments were often delayed (FAO 2009). Many producers, consumers, millers and traders circumvented the controlled market, leading to high prices in parallel markets and unstable supplies. Few A2 producers 'obeyed' the marketing regulations, acting with patriotic solidarity, while expecting future subsidies (Mhondoro District Interview 2009¹⁰). This non-alignment between government subsidies and parallel market prices limited the potential welfare transfers to deficit areas, despite the substantial fiscal outlays and their supplementation by humanitarian aid.

Around 55 per cent of land beneficiaries sold their maize to the GMB, while the rest used local markets. Over 22 per cent of all the beneficiaries sold their edible beans to the GMB, with slightly more A1 beneficiaries doing so (Moyo et al 2009). Over 35 and 57 per cent of the soyabeans produced by the A1 and A2 land beneficiaries, respectively, were sold to the GMB, which used soyabean trading to generate income, while around 31 per cent of this crop was retained for own use (Moyo et al 2009). The rest was sold to agro-processing firms, contractors and local agro-dealers, including some which had secured subsidies. Distance from markets, limited state capacity and manipulative trading practises by the growing and variegated merchant classes generated various contradictions around state interventions in markets.

Most of the tobacco and cotton was being sold by land beneficiaries to contractors and private buyers in 2006, while over 65 and 55 per cent sold their sugar and tea in Chiredzi and Chipinge, respectively, to agro-processing plantations. Between 22 and 40 per cent of the A2 producers of cotton and tobacco had kept their output that year because prices were poor, while 12 and 24 per cent of the A1 and A2 farmers could not secure 'independent' markets for their sugar, allegedly because buyers rejected it on grounds of poor quality (Moyo et al 2009).

In 2006, the RBZ partially relaxed the policy of withholding large proportions of foreign currency earned by exporters (RBZ 2006). Contract farming benefited from this policy change and became central to the marketing of most commodities, excluding grains, building upon previous experiences with cotton and barley. A few black tobacco merchants piloted such contracting and later sold the businesses to transnationals. The number of tobacco contractors grew to 12 in 2010, from fewer than 3 in 2003, including four black firms, four new multi-racial contractors and four foreign contractors from China and elsewhere (TIMB 2010). Some of these were subcontractors of western transnationals such as British American Tobacco. Cotton contractors and buyers also increased and included Indians and Chinese, with the latter up scaling tobacco contracting.

Understanding the role of contract farming in class formation processes is complicated by its unclear association with land sizes and assets owned. Some contract financiers prefer peasants and middle-scale producers because they are less able to resist lower price margins, compared to larger-scale producers, who generally have higher social standing and fare better in procuring inputs using their own income, credit and subsidies. Conflicts arose between farmers and contractors over the depressed prices on offer and many 'resisted' this by side marketing their contracted commodities to other merchants who had not provided contract inputs to them. But they bought such outputs at marginally higher prices. New sugar outgrowers fought with plantation managers over transportation charges and the pricing of inputs and outputs (*The Herald* 2011b).

After market liberalisation and dollarization, the limited contract production of foods such as soyabeans faced competition from subsidised imports from the West and GMO-based grain and oilseeds imports from South Africa. This competition drove farmgate prices down, reducing local producer incomes. To some extent, this reduction propelled many small producers needing cash to reinvest in tobacco contracts. This explains the second temporal decline in the soyabean output levels in 2009.

The government revived the Agricultural Marketing Authority (AMA) in 2004 to better regulate markets and introduced new contract farming regulations in 2009 (USAID 2010). By 2011, however, the large-scale Zimbabwe Commercial Farmers Union and the Commercial Bank of Zimbabwe (CBZ), backed by the Ministry of Trade and Commerce and funded by some donors, were establishing the Commodity Exchange in Zimbabwe (COMEZ). The AMA feared this would drive speculation on food

and increase foreign influence (*The Herald* 2011c). Class-based struggles over these changing agrarian markets remain potent and open with finance being critical.

Access to finance for farming

Throughout the 2000s, the volume of agricultural finance from domestic sources and external concessional loans and aid from western donors fell sharply, as compared to provisions during the 1990s (RBZ 2007b). Private agricultural credit declined from over \$315 million in 1998 to about \$6 million in 2008 (MAEMI 2009). European trade credit and the agricultural commodity bonds market had virtually disappeared by 2005. Government credit through Agribank had averaged around \$25 million per annum between 2000 and 2007 and had peaked at \$104 million in 2004, but it declined to below \$3 million in 2007 (MAEMI 2009). Declining revenues limited budgetary allocations and led to larger-scale money printing. This credit constraint fuelled the diversification of the forms and sources of agriculture finance from the mid-2000s.

During this time, subsidised credit, inputs and foreign currency supplies increased (RBZ 2005). Foreign currency was being secured on parallel markets by citizens and the government, which fuelled speculative pricing, shortages of goods and hyperinflation. By 2004, the government attempted to plug the wheat deficit through sub-contracted production and other partnerships with domestic agro-industrial capital on the ARDA estates, using subsidised funds (Moyo 2011b). But this effort floundered in over pricing and profit-sharing disagreements.

Hyperinflation made agricultural credit less 'competitive' than short-term trading (Matshe 2004). The World Bank (2006) attributed decreased financing to the undermining of profitability and investment incentives by market controls. Others argued that the land user rights policy and land disputes created uncertainties for investors and limited credit supplies (Richardson 2005; Rukuni et al 2009).

During 2006, over 78 per cent of the A1 land beneficiaries used their savings, remittances from home and abroad and non-farm incomes to finance farming operations, compared to 83 per cent of the A2 farmers. Only 10 per cent of both A1 and A2 received external financing for production and 2 per cent had access to credit (Moyo et al 2009). But rising food and input prices after the 2002 drought and the global price hikes in 2005 undermined the real incomes of peasants (Wiggins 2005).

Not surprisingly, contract farming became central to the financing of smaller and middle-scale farmers (see *The Standard* 2009), who joined export production to gain access to inputs and increase their earnings. This move shifted pre-2000 agrarian relations from the dominance of private credit relationships between large-scale farmers and banks towards bonding more farmers with contracting intermediaries. Before 1986, the government had been the major lender (Moyo 1995). When foreign currency and agricultural markets were re-liberalised, agricultural sub-contractors escalated such pre-financing arrangements. Private bank credit to agriculture increased to over \$300 million in 2010 (MoF 2011), but over 60 per cent of this amount went to contractors (USAID 2010).

China played a leading role in financing agriculture through loans for imported fertiliser, agro-chemicals and tractors and in contracting tobacco and cotton from 2006 (Edinger and Burke 2008). By 2009, the state had lured 'foreign investors' in partnership with domestic capital to produce and process sugarcane (for ethanol) and increase beef exports, using 20-year Build, Operate and Transfer (BOT) and land-lease arrangements on parastatal lands (Moyo 2011b). Large agribusiness was regaining dominance in agricultural input and output markets and new agrarian capital from the East and South was seeking to invest in agricultural exports and to supply inputs. Zimbabwe remained a net exporter of capital to the West during the decade (UNCTAD 2008).

In this situation, the recovery of agricultural production on the large private and public farming estates increasingly relied on foreign investments (see Moyo 2011b). The export-oriented production of the foreign-owned estates lingered on as they planned to triple sugarcane outputs on 30,000 more hectares to meet Zimbabwe's EU quota and other markets, in the context of the Economic Partnership Agreements (EPAs) under the ACP-EU Lome Convention. The European Commission aid towards a National Sugar Adaptation Strategy proposed to leave the home market with 28 per cent of such output. 'Dollarization' in 2008 created better 'incentives' for increased external financing of the foreign estates' sugar export plan, including from the EU aid and from domestic private bank credit. This increased sugar production promised to consume much of the scarce national water supplies, vis-à-vis other production needs.

Foreign financing for agriculture since 2002 has relied on new small loans and barter deals, while negotiations on the forward sales of mining concessions (ensued largely to import agricultural inputs and machinery) failed to

materialise (Moyo 2010). Foreign 'investors' were by 2004 being encouraged, under the Look East Policy (focused on the Chinese), to sub-contractually buy tobacco and cotton. Substantial Chinese state trade credit to import fertiliser, agricultural chemicals, tractors, generators and pumps was secured from 2006, while foreign financing from Russia, Indonesia and Malaysia was being brokered by white domestic capital, especially to invest in the public estates.

By 2009, ARDA had signed a 20-year joint-venture agreement with private white Zimbabwean owned companies (Rating Investments Ltd and Macdom Investments Ltd) to lease over 50,000 hectares of ARDA's Middle Sabi and Chipinge estates, in a Build, Operate and Transfer Scheme (BOT). This was intended to establish 40,000 hectares of sugarcane and revive irrigation infrastructures within eight years and later to develop 10,000 more hectares (*The Herald* 2010). A two-year, rent-free grace period was provided, ostensibly to allow the sugarcane to gestate, while some sugar outgrowers were to be contracted. Construction of the \$600 million sugarcane-to-ethanol distillery plant with a capacity to produce 35,000 to 40,000 litres per day (GAIN 2010) through another foreign 'investor' (Green Fuels (Pvt) Limited) was completed in early 2011 and 3,000 new hectares of sugar were being reaped for processing at ARDA's ethanol plant, with ethanol being supplied as fuel by November. No share was provided for the peasants from the adjacent Garahwa Communal Lands who originally owned the land, although by mid-2011 they were being incorporated as sugar outgrowers.

In 2008, the DTZ leased over 140,000 hectares of its land to a joint firm between DTZ and Custa (Pvt) Ltd, called the Zimbabwe Bio Energy (ZBE) project. Custa (Pvt) Ltd is owned by a white Zimbabwean large-scale capitalist (Billy Rautenbach) and foreign investors (from Russia and Spain), holding 70 per cent of the shares and investing \$15 million (Moyo 2011c). About 100,000 hectares are dedicated to sugarcane production towards producing 500 million litres of ethanol per year. The rest of the land is intended to increase the cattle from 5,000 to 25,000 head, as well as to increase 100,000 crocodiles to 300,000 by 2012 and over 2,000 people were employed by DTZ. This deal led to the non-renewal of the DTZ's grazing leases with black elites and unsuccessful attempts to evict 'illegal' land occupiers, since the central government pressed the DTZ to allow 263 settlers to retain some land, dissociating itself from dispossessing this constituency.

Unlike the private sugar estates, the GoZ sought to resuscitate and expand ethanol and agro-industrial raw materials production.¹¹ The new foreign investments were meant to triple these industrial inputs. The inputs produced

include ethanol for industrial, potable and pharmaceutical requirements; other sugar by-products, including molasses and bagasse, ingredients for yeast, carbon dioxide, livestock feedstock and fertilizer substitutes from vinnasse; while generating more electricity at the mills. Sugarcane production for agro-fuel may soon dominate foreign investments in the south-eastern region's estate lands, which are expected to produce 90 per cent of Zimbabwe's agro-fuels on over 150,000 hectares by 2012.¹² This re-orientation of estate production towards substituting domestic transport fuel imports with agro-fuels runs counter to the EU's extroverted strategy, although the ecological benefits of this plan are to yet be calculated. However, it promises to reduce fuel imports and raise local agro-industrial capacity, creating scope for some national sufficiency.

The gradual recovery of production on the estates and their outgrowers indicates the premium placed on neoliberal policies by foreign 'investors', who continued to rely on borrowing locally while maintaining their control of the sugar and tea 'commodity chains'. The GoZ agrarian policy on the estates was intended to simultaneously counter agricultural production deficits and import dependence, while extending the state's capacity to direct development towards an articulated trajectory, including increased local beneficiation of agricultural raw materials and agro-industrial growth. The scale of social and 'developmental' benefits that can be expected from these foreign investments is, as yet, unclear. Thus, deeper land redistribution was being traded-off against shoring up the sanctioned objective of the state's relative autonomy from 'western' capital and the Bretton Woods institutions (various interviews).¹³ This vision of state accumulation and autonomy, alongside nurturing a national 'bourgeoisie', was also initially opposed by less influential provincial officials and politicians, reflecting their desire to control sub-national accumulation processes, but these acquiesced from 2011 when the Indigenisation Policy promised to offer them shareholdings.

Moreover, political stabilisation and the liberalisation of financial markets from 2009 was leading to increased domestic agro-industrial processing capacity utilisation levels from below 20 per cent in 2008 to over 50 per cent in 2011 (MoF 2011). More foreign export crop merchants were returning. But by 2011, formal cross-border trade had increased the importation of foods, beverages and farm inputs, giving local agricultural producers and processors stiff 'competition' from cheaper (GMO and duty free) imports from South Africa, Brazil, China and the 'West'. This increase led to new demands for trade protection, which the GoZ responded to by increasing tariffs on processed and packaged foods (MoF 2011). Speedier agricultural

recovery, however, remained constrained by limited access to private credit related to the low levels of liquidity and associated high interest rates (ibid).

These reconfigurations of the agrarian markets and state interventions fuelled contradictions within the state apparatus over its autonomy and the uneven benefits realised by various farming classes. The re-financialisation of Zimbabwe's economy was increasingly orienting agricultural production to exports, but diversifying its global integration. The class dynamics of the emerging agrarian relations reinforced the policy shift that enabled the dominance of large foreign and domestic capital, which, as of 2011, was only peripherally engaged directly in production.

Changing farmer organisation

These shifts in the agrarian relations altered the political landscape and re-oriented the politics of agrarian reform as new forms of farmer organisation and protest emerged at the local and national levels, through various types of farmer and commodity associations (Moyo et al 2009; Moyo 2011c; Murisa, Chapter 7). International capital, in alliance with new large-scale farmers and the established white and emerging black bourgeoisie led the reconfiguration of agrarian markets towards an increasingly neoliberal regime. New forms of social differentiation among the peasantry and emergent capitalist farmers, which shaped new forms of accumulation, gradually began to polarise agrarian reform policy and to animate the rural political constituency. Continued western sanctions and new forms of aid to vulnerable farmers also began to neutralise the political advantages derived from state subsidies. By 2010, the promise of new fruits from the indigenisation of mining and other businesses were generating new intra-class and multi-racial conflicts, slightly shifting the political heat from agrarian reform.

The former white farmers' unions had reconstituted their lobbies into two: the Commercial Farmers' Union (CFU), which retained a few members and the new Justice for Agriculture (JAG). They sought to influence national policy and international support over compensation for their lost land and the rationalisation of land use through the Land Audit proposed by the Inclusive Government and proposals to privatise land tenure. Elitist auditing perspectives also implied that poorer 'unproductive land users' could be evicted, while raising hopes among sections of the elite of gaining access to land. Some scholars and political actors sought to use the land audit to reverse the alleged ZANU-PF patronage in the land allocations (see Zamchiya 2011), while white farmers saw it as a route to revive the compensation debate.

Yet a more broadly-based class and social process defined the land allocations and the range of beneficiaries, despite the ruling party's overall dominance in the process. By 2010, many land beneficiary groups were mobilising networks to defend their land, while seeking to expand state input subsidies. Indeed, informal struggles over access (outside the official processes) persist, given the popular demand (see Moyo, Chapter 2) and competing claims over some land and natural resources. Local state authorities, including the bureaucracy and traditional leadership and ZANU-PF structures remain central to mediating the social legitimacy of such land struggles, placing pressures for continual land redistribution.

The state faces pressure to expand agrarian support and market protection from various middle class and capitalist lobbies in farming, agro-industry and trade, including some formed specifically to access subsidies. Local farmers' associations aggregated their resources to tap public extension and inputs support and to negotiate markets (Moyo et al 2009; see Murisa 2010) and competed with middle-scale and larger-scale farmers within the bureaucracy to influence agrarian policy towards more subsidies. Recognising the input shortages facing peasants, the Inclusive Government gradually increased subsidies to them (MoF 2011), while negotiating new strategies to subsidise A2 farmers. Contract farming relations also drove the growth of local farming associations, reinforcing the influence of capital in agrarian markets with support from the bureaucracy. Meanwhile, many NGOs, which had stood aloof all along, now competed to mobilise small farmers into market-oriented input support schemes funded by donors in collaboration with older farmers' unions (see FAO 2011).

New agricultural commodity associations, mostly representing middle-scale farmers (e.g., the Sugar Cane Farmers Outgrowers' Association), also mobilised against former white landowners and estate managers over land, contract services and output prices, as well as for improved access to water for irrigation. The struggles for water now involved the private and public and other new black farmers upstream and downstream of the concerned waters. Agrarian politics are also being re-shaped by the changing local administrative and political power relations that resulted from replacing white farmers' control over land, territory and labour with local influence now being more broadly diffused. The landless remain the most vulnerable. Sparse local government authorities are ill-equipped to regulate the new, but ubiquitous, struggles over natural resource and mineral extraction in competition with agriculture, while hereditary chiefs demand more powers to oversee resource management (Moyo 2011d).

Despite this reconfiguration of agrarian politics, past discourses shaped by political party polarisation continued to cast a shadow over progressive egalitarian agrarian reforms. Such discourses have limited the prospects for further democratising the land administration system, regulating agrarian markets in favour of small producers and enhancing state agricultural support.

Conclusion

Zimbabwe's agrarian reform has reconstituted the structure and orientation of agricultural (and non-agricultural) production, mainly through expanding the numbers of small and middle-scale agricultural producers and reconfiguring rural labour relations. Large-scale farm holdings and plantations persist with disproportionately more land than is warranted, while agro-industrial estates were marginally restructured, by introducing more small-scale outgrowers and through the expansion of public estate production, increasingly in partnership with foreign capital. Agrarian labour relations are now dominated by self-employment in diverse farming and non-farm activities, with part-time wage-labour being more common, while prevailing agricultural wages and incomes remain repressed by low productivity, exploitative commodity markets and slow recovery of production in other economic sectors.

Overall, agricultural outputs had declined, immediately after the land transfers and as the policies failed to mobilise adequate agrarian finance, when capital had retreated. Outputs began to rise slowly and selectively from 2006, with a wider range of producers cultivating much more land, mainly for food, despite low land productivity due to limited access to farm input markets and subsidies. Many more producers are involved in producing diverse exports than before 2000 and these realise the greatest access to farming inputs. Nonetheless, there has been a general rise in self-generated income earnings from farming and accumulation of assets, as well as signs of a broad process of income redistribution.

While established agro-industrial conglomerates, merchants and banks had substantially retreated from supplying farming inputs and credit and the buying of commodities, by 2002, some were propped up by state subsidies. Their supplies were revamped when markets were re-liberalised from 2009. However, agricultural production is increasingly being organised through contract farming, focusing on export commodities, including new contractors from the East. Loans negotiated with China and Brazil supported the revival and reconfiguration of agrarian markets, luring back capital from the West. But such gains were circumscribed by increased export orientation and the

ascendancy of agribusiness over popular markets, given the limited fiscal capacity of the state, reeling under sanctions.

Nonetheless, the restructuring of Zimbabwe's agrarian relations has the potential to deepen the autonomy of the peasantry and intensify productivity towards increasing supplies of more nutritious foods and raw materials for the home market. Class struggles over land, agrarian markets and labour now entail new and more broadly based forms of smaller producer organisations and protests, pitted against larger-scale farm producers and foreign monopoly capital, aligned to expanding multi-racial domestic capital, whose members traverse political party lines. Progressive agrarian policies should consolidate the trajectory of smallholder development by securing peasants' land and protecting their markets to enhance popular food sovereignty, productivity and cash-earnings from self-employment in farming and non-farm industry. This protection requires stronger producer and consumer cooperation against agri-business and contractors (from the West, East and South) that link input and credit supply to crop purchases at depressed prices and against trade policies which enhance the dumping of subsidised foods. Expanding the democratic space and regaining policy autonomy towards articulated national development will be critical to advancing policies in favour of the peasantry and industrial diversification. Redirecting the expanding rents from mining to support this agenda will be crucial. As elsewhere, agrarian change under contemporary imperialism is neither linear nor even.

Notes

1. The chapter relies on research undertaken through the African Institute for Agrarian Studies (AIAS) between 2002 and 2010 (see Chapter 1 on the methodology, including sources of data).
2. Eight of these estates, comprising 52,264 hectares, were leasehold lands belonging to Communal Areas.
3. Notable are the Openhiemer, Nicolle and Moxon families and the Charter Estates' families (Moyo 1998).
4. The A1 model targeted landless and poor families, providing land use permits on small plots for residence cropping and common grazing, while the A2 scheme targeted new 'commercial' farmers, providing larger individual plots on long-term leases to beneficiaries supposedly with farming skills and/or resources (including for hiring managers).

5. Tongaat Hulett Limited, a South African agro-processing group, owns 100% of Triangle Limited and in 2006 bought a 50.35% stake in Hippo Valley Estates.
6. This is distributed as 21,553 hectares by Triangle Limited, 19,917 hectares by Hippo Valley Estates and 442 hectares by Mkwesine Sugar Estates (Scoones et al 2010).
7. Zimbabwe Coffee Mills, 2010, Personal communication by email, October 2010.
8. Interview with Theo Khumalo of COLCOM, April 2011, Harare.
9. Zvimba Field Observation, 2008, observation by Prof. Sam Moyo during the field trip at Zvimba.
10. Mhondoro District Interview, 2009, interview of land beneficiaries by Prof. Sam Moyo during a field trip at Mhondoro, January 2009.
11. Triangle Ltd stopped producing ethanol for petrol blending in 1992, but in 2006, the GoZ's National Oil Company of Zimbabwe (NOCZIM) contracted Triangle Ltd to supply it with 20 million litres of ethanol (EU 2007).
12. The National Biodiesel Production Programme (GoZ 2007) promotes agro-fuel production from *Jatropha* for the remaining annual agro-fuel requirements on 120,000 hectares of small producers' land. 60,000 hectares had been planted in 2010 (interview with E. Mushaka, NOCZIM 2010), but this project stalled due to limited state financing.
13. Various interviews with central government officials between 2006 and 2008.

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