CONTRIBUTION OF SMALLHOLDER AGRICULTURE TO MARKETED OUTPUT IN ZIMBABWE 1970-1985: RECENT EXPERIENCE AND SOME FUTURE RESEARCH ISSUES

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1. INTRODUCTION

Following independence in 1980, the Zimbabwe Government has given priority to rural and agricultural development. The main thrust of present agricultural policy is to improve agricultural production in the smallholder farming sector through the expansion of agricultural support services and the maintenance of realistic producer prices. At the same time, great political prominence has been attached to national programs to redistribute land from large scale to smallholder agriculture.

One of the major "uncertainties" surrounding the prominence given to small scale farmers in Government agricultural development strategy relates to the ability of small scale producers to deliver a marketed agricultural surplus of food and cash crops sufficient to maintain this sector's instrumental role in national development. In some circles, it has been felt that the increasing emphasis placed by national agricultural policy on small scale production and in particular the redistribution of land from large scale to small scale producers, could lead to a dramatic reduction in marketed output.

This paper examines the changing nature of small scale producers' contribution to marketed output over the past 15 years as reflected in their share of sales to statutory marketing authorities. The data presented show that since independence, despite 3 drought years, there has been a dramatic expansion in the sales of some of this country's major food and cash crops from the small scale sub-sector. Recent experience provides evidence to support the thesis that given adequate price incentives and investment in supporting infrastructural development, smallholders are capable of producing a sizeable market surplus of both food and cash crops. In this respect, the small scale sub-sector are likely to be instrumental in sustaining agricultural production during the years of structural transition in the agricultural sector as a whole. However, this paper raises a number of questions regarding the nature of, and reasons for, this dramatic upsurge in small holder involvement in the national economy, which it is argued, can only be fully examined by disaggregating national statistics.

Zimbabwe's stated guidelines for development planning identify ten broadly focused agricultural and rural development objectives. These include: land redistribution, improving economic welfare of rural population, increased employment, achievement and maintenance of food self-sufficiency and regional food security, extension of agriculture's role as a major foreign currency earner and source of industrial inputs, integration of commercial and peasant agricultural sectors, land conservation, promotion of local markets and regional trade, human resource development in rural areas. Transitional National Development Plan 1982.
2. OVERVIEW OF AGRICULTURE IN ZIMBABWE

2.1 Structure of Agricultural Sector

A major feature of the Zimbabwean agricultural sector is its division into a large scale or commercial sub-sector and a small holder sub-sector incorporating the communal areas, small scale commercial lands, and the recently established resettlement areas. The commercial sector comprises some 4,800 mainly white farmers, who occupy 15 million hectares of generally better lands under free-hold title. The small holder sector comprises some 716,500 farming units who occupy a total of 18.5 million hectares of land mainly in the poorer climatic zones. The overall composition of the small holder sector is illustrated by the figures below:

<table>
<thead>
<tr>
<th>TABLE 1</th>
<th>COMPOSITION OF SMALL HOLDER SECTOR</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Unit</td>
</tr>
<tr>
<td>Population</td>
<td>000's</td>
</tr>
<tr>
<td>Arable Land</td>
<td>000 'ha</td>
</tr>
<tr>
<td>Farming Units</td>
<td>Households</td>
</tr>
<tr>
<td>Average cropped area per farm</td>
<td>ha</td>
</tr>
<tr>
<td>Tenure</td>
<td>-</td>
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</tbody>
</table>

Source: World Bank 1985

Before independence the Zimbabwean agricultural industry was dominated by the large scale sector, which produced the bulk of marketed agricultural output. As a major foreign currency earner, this sector had a large share of government support; agricultural policies were largely directed at developing large scale commercial agriculture. By contrast the small scale sector, mainly subsistence in character and operating at low levels of productivity, had no influence to any significant degree on agricultural policy. This sector had limited access to marketed inputs such as fertiliser and improved seeds, received minimal amounts of agricultural credit and had poor linkages to the national marketing channels.
After independence, programs were initiated to address the obvious imbalance between the development of commercial and peasant agriculture under white minority rule. Significant achievements have been made in improving small scale producers access to agricultural support services as shown in Table 4. Notable developments include an expansion in seasonal credit from Z$14.0 million in 1981/82 season to Z$50.4 million in 1984/85 season and an increase in the number of GMB purchasing depots situated in small scale farming areas from only 3 in 1980 to 13 by 1985. These developments have been accompanied by a marked increase in fertilizer sales to the small holder sector and by an almost four fold increase in the number of small scale producers registered with the GMB.

2.2 Contribution of Agriculture to the National Economy

Zimbabwe is a middle income developing country with a GNP per capita of US$470 (World Bank 1983). Whilst the economy can be described as well diversified with advanced industrial and financial sectors, the agricultural sector still clearly plays a leading role in the economy through its contribution to national income and foreign exchange earnings and by its provision of food and income to about 55 percent of the population.

Agriculture contributes some 15 percent of Gross Domestic Product and accounts for about one quarter of all wage employment. Agricultural products supply around 40 percent of the value of inputs to the manufacturing sector and represent over 45 percent of the total value of exports.

2.3 Agricultural Marketing

Zimbabwe operates a single-channel marketing system for most of the country's important commodities. Tobacco is marketed through auction floors under government supervision. Many other crop commodities are defined as 'controlled' crops, meaning that statutory marketing boards are responsible for purchasing part or all of the marketed surplus. The two crop marketing boards concerned, the Grain Marketing Board (GMB) and the Cotton Marketing Board (CMB) operate under an umbrella association called the Agricultural Marketing Authority (AMA), which is responsible for co-ordinating and funding the operations of the two boards.

The Grain Marketing Board is responsible for the marketing of maize, sorghum, soyabeans, groundnuts, wheat, coffee, sunflower and rice. Marketing of these commodities is strictly controlled; virtually all commercial farmers are required to sell their produce exclusively to it. In the small scale sector, direct producer-to-consumer transactions are permitted within local areas. Small scale farmers, however, may not sell to consumers in neighbouring urban or large scale farming areas. Sales of crops from small scale farmers to be exported
to other areas within Zimbabwe must, therefore, be through the GMB. In turn, the Board offers a guaranteed uniform price on a nationwide basis for all deliveries of these commodities. Since the 1984/85 marketing year, millets and edible beans have also been handled by the GMB. For these crops, the Board acts only as a residual buyer at guaranteed prices.

GMB currently operates over 40 purchasing depots in the country (See Table 4 Appendix I). Prior to independence, the Board had a policy of only siting depots along lines of rail. This generally meant that the depots were a considerable distance from small scale farming areas and these farmers were forced to transport their crop uneconomic distances for sale. Since 1980 a large number of depots have been opened up in the communal areas.

The Cotton Marketing Board is responsible for the purchase of seed cotton from growers and is obliged to buy all the seed cotton output at guaranteed uniform prices. The GMB operates some 16 depots, well distributed in all the major cotton growing regions, including small scale farming areas.

Producer prices are determined annually by Government after consultations between the Ministry of Agriculture, Agricultural Marketing Authority and producer associations. In recent years Government has reverted from its policy of announcing pre-planting prices and instead generally leaves producer price announcements until later in the season when national crop production can be fairly accurately assessed. (Producer prices over the period 1970-1985 for selected agricultural commodities are given in Table 5, Appendix I.

3. ANALYSIS OF SMALL SCALE SECTORS CONTRIBUITION TO MARKETED AGRICULTURAL OUTPUT 1970-1985

The following sections analyse the production and marketing of Zimbabwe's major controlled crops over the period 1970-1985 and examine the changing level of participation of small scale sub-sector in the official marketing system.

Accurate information on the level of marketing of controlled commodities from small scale and large scale producers is available from the marketing boards concerned. Total production figures for the large scale sector can be fairly accurately assessed from crop estimates submitted by farmers to producer associations and from the annual agricultural census of large scale commercial farms. However, reliable production data for the small scale sector are not available since no agricultural census of this sector is undertaken. Production estimates for this sub-sector are made by the annual crop forecasting committee in the Ministry of Agriculture based on returns submitted by regional agricultural extension officers.
### Table 2: Production and Official Marketing of Selected Commodities by the Small Scale Sector Over the Periods 1970-1974, 1975-1979, 1980-84, and 1985

<table>
<thead>
<tr>
<th>Year</th>
<th>Harvest</th>
<th>Maize Production (000 tonnes)</th>
<th>Percent of National Total</th>
<th>Sorghum Production (000 tonnes)</th>
<th>Percent of National Total</th>
<th>Cotton Production (000 tonnes)</th>
<th>Percent of National Total</th>
<th>Groundnuts Production (000 tonnes)</th>
<th>Percent of National Total</th>
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<tr>
<td>1970</td>
<td></td>
<td>411.6 (SD 183.3)</td>
<td>25</td>
<td>87.4 (SD 46.2)</td>
<td>88</td>
<td>30.3 (SD 17.2)</td>
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<td>98.7 (SD 32.2)</td>
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<td>(SD 20.7)</td>
<td>4</td>
<td>(SD 14.2)</td>
<td>32</td>
<td>(SD 5.2)</td>
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<td>(SD 16.1)</td>
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<td>59</td>
<td>83.1 (SD 42.5)</td>
<td>97</td>
<td>-</td>
<td>-</td>
<td>(SD 24.2)</td>
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<td>1975</td>
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<td>495.1 (SD 23.3)</td>
<td>31</td>
<td>75.0 (SD 37.5)</td>
<td>85</td>
<td>36.8 (SD 4.1)</td>
<td>24</td>
<td>99.3 (SD 26.0)</td>
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<tr>
<td></td>
<td>Sales</td>
<td>64.0 (SD 18.0)</td>
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<td>1.1 (SD 0.3)</td>
<td>8</td>
<td>36.8 (SD 4.1)</td>
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<td>85.2 (SD 17.1)</td>
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<tr>
<td>1980</td>
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<td>646.2 (SD 253.7)</td>
<td>39</td>
<td>59.3 (SD 23.1)</td>
<td>78</td>
<td>63.3 (SD 21.1)</td>
<td>33</td>
<td>42.0 (SD 24.2)</td>
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<td></td>
<td>Sales</td>
<td>272.7 (SD 126.2)</td>
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<td>4.1 (SD 3.1)</td>
<td>21</td>
<td>63.3 (SD 21.1)</td>
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<td></td>
<td>Retentions</td>
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<td>55.2 (SD 22.0)</td>
<td>96</td>
<td>-</td>
<td>-</td>
<td>39.8 (SD 23.4)</td>
<td>99</td>
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<tr>
<td>1985</td>
<td></td>
<td>1771.0 (SD 253.4)</td>
<td>58</td>
<td>82.0 (SD 22.0)</td>
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<td></td>
<td>Sales</td>
<td>894.0 (SD 47.1)</td>
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<td>40.6 (SD 24.1)</td>
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<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>34.2 (SD 100)</td>
<td>100</td>
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</tbody>
</table>

**Source:** Agricultural Marketing Authority and Central Statistical Office

1. Incorporates communal areas, small scale commercial lands and resettlement areas.
2. Estimate
3. Forecast
Fig 1a: National maize production
Fig 1b: National maize disposal
Fig 1c: Official maize sales
Fig 1d: Small-scale sector maize disposal
Fig 1e: Total maize area

Fig 2a: National sorghum production
Fig 2b: National sorghum disposal
Fig 2c: Official sorghum sales
Fig 2d: Small-scale sector sorghum disposal
Fig 3a: National cotton production

Fig 3b: Total Cotton Area

Fig 4a: National groundnut production

Fig 4b: National groundnut disposal

Fig 4c: Official groundnut sales

Fig 4d: Small-scale sector groundnut disposal

Statistical Sources: Grain Marketing Board
Agricultural Marketing Authority
Central Statistical Office
Production and marketing data for the small scale sector are given in Table 2, and illustrated graphically in Figures 1 - 4. Farm retentions represent the difference between total estimated production and official marketed output and therefore include output retained for local sales as well as for on farm consumption requirements. For analytical purposes the data have been sub-divided into three time periods, 1970-1974, 1975 - 1979 and 1980-1984. Crop forecasts for the recent agricultural season are used to highlight current trends.

3.1 - Grains (Table 2 and Figures 1a-e and 2a-d)

3.1.1. Maize

Maize is the most important grain crop grown in Zimbabwe and is also the preferred staple food.

Over the period 1970-1974 estimated maize production in the small scale sector averaged 411.6 thousand tonnes per annum (25 per cent of national production), and official sales to the GMB averaged 36.5 thousand tonnes or 4 per cent of GMB intake. In the following period (1975-1979) small scale maize production expanded modestly, but whilst official maize sales rose significantly, this sector's contribution to GMB intake remained relatively minor (7 per cent of official sales). In contrast, over the years 1980-1984, estimated small holder production averaged 646 thousand tonnes per annum, (39 per cent of national production) and official sales averaged 272 thousand tonnes per annum, 23 percent of GMB intake. There has therefore in recent seasons been a dramatic increase in the contribution of the small scale sector to marketed maize surplus. Increased sales are partly attributable to a combination of expanded maize hectarage (see Figure 1e) and higher yields. However data for the periods 1975-1979 and 1980-1984 show that increased GMB maize receipts from small scale producers have also been accompanied by falling retentions. The latter is probably due to a decline in unofficial maize sales as farmers gained improved access to official markets which offered better crop prices. However, an additional explanatory factor is consumer maize price policy. For a short period following independence (1981-1983) government food subsidies led to a situation where maize meal prices were below producer prices. Farmers could therefore market their whole grain to the GMB and buy back their milled grain requirements at a lower price. By 1983/84 season this anomaly in the pricing structure had been corrected.

In 1985 the small scale sector is estimated to have harvested a maize crop of more than 1.7 million tonnes; official sales are expected to reach 900 thousand tonnes and to represent close to 50 per cent of GMB receipts.
3.1.2 Sorghum and Millets

Sorghum is Zimbabwe's second most important staple grain and is also used for brewing traditional beer. Small scale farmers traditionally dominate sorghum production although until recently little was delivered to the GMB by this sector. Over the last fifteen years there has been a steady decline in sorghum production amongst small scale producers which is probably largely due to the substitution of local sorghum varieties by improved higher yielding maize varieties.

Over the period 1970-1974 the small scale sector was responsible for nearly 90 per cent of estimated total sorghum production but contributed less than one third of official sales. From 1975-1979 sorghum production fell slightly and official sales from the small scale sector dropped to around eight percent of GMB intake. A further decline in sorghum production occurred during 1980-1984 due partly to the effects of the drought but also as a result of the favourable national crop price policy for maize. However despite this production fall, official sorghum marketing from this sector recovered to the level of the early 70's. In 1985 small scale farmers are estimated to have harvested a sorghum crop of 82 thousand tonnes, and are likely to account for nearly 50 percent of sales to GMB.

Millets are grown by small scale producers farming in the drier regions of Zimbabwe. GMB has been acting as residual buyer for these commodities only since 1984 and sales are almost entirely from the small scale sector.

3.1.3 Wheat

All wheat produced in Zimbabwe is grown under irrigation during the dry winter months. Production is therefore dominated by large scale producers and state farms with stored water supplies. The small scale sector's contribution to wheat output is very small (less than eleven percent in 1984).

3.2 Cotton (Table 2 and Figures 3a and 3b)

Cotton is Zimbabwe's second most important agricultural export crop (after tobacco) accounting for Z$117.4 million; twenty percent of total agricultural exports and nine percent of total domestic exports in 1984. Cotton is also the biggest small holder cash crop.

Small scale producers have participated in the production of cotton since the mid 1960's when government initiated a crop diversification exercise to offset the effect of trade sanctions on the country's major export crop, tobacco. The CHB has actively encouraged the participation of small scale producers.
Small holder output rose steadily during the 70's and accounted for around 24 percent of total output over the period 1975-1979. In recent years there has been a tremendous upsurge in cotton production amongst small scale producers and average annual output between 1980-1984 was almost double the production during the previous ten year period. The development of small scale cotton production can be attributed both to its drought tolerant nature and its comparative advantage over other cash crops in the more marginal areas of Zimbabwe.

In 1985, the small scale sector is estimated to have produced 1.297 thousand tonnes of seed cotton, suggesting a further increase in the share of small holders in cotton production.

3.3 Oilsseeds (Table 2, Figures 4a-d)

Four major oilseeds are produced in Zimbabwe. These are soya beans, groundnuts, cottonseed and sunflower seed, all of which fall under the regulation of the statutory marketing boards. One of the striking features of the development of the industry since the mid 60's is its trend towards diversification. Originally groundnuts were by far Zimbabwe's most important oilseed. Cotton seed began to gain prominence in the early 70's and has continued on a generally increasing trend since that time. It was only in the late 70's that soya bean production reached significant levels.

Currently cotton seed and soya beans account for approximately sixty percent and thirty five percent respectively of annual offtake by expressers while sunflower seed, and groundnuts together account for less than five percent. At present, all oil expressed is absorbed largely by the domestic market.

As a result of growth in the small scale sector's cotton output in recent years, in both absolute and percentage terms, small holders now make a very significant contribution to the production of cottonseed, this country's dominant oilseed.

The small scale sector is minor in terms of national soya bean production, with the large scale-commercial farm sector accounting for more than 98 percent of GMB receipts over the period 1960 - 1984.

The pattern of groundnut production and sales from small scale producers contrasts sharply with that of cotton and grains, each of which in recent years has experienced significant expansion in output and marketing. Estimated groundnut production shows a marked decline from average of around 99 thousand tonnes per annum during the period 1970-1979 to 42.0 thousand tonnes over the period 1980-1984. The fall in official marketing from this sector
has been more dramatic still. Limitations of space preclude detailed discussions of the reasons for such a drop in output but the trend is one that has been paralleled in the large scale sector. Inadequate producer prices and comparative advantage of alternative cash crops, such as maize and cotton are probably the main causes. As a consequence of the decline in output, shortage of planting material has in the last couple of years been a constraint to reviving production. Crop estimates for 1985 indicate a rise in small holder groundnut production after the good agricultural season. Increased sales to GMB are also anticipated following the recently announced 50 percent increase in producer price of groundnuts.

Sunflowers were only designated a controlled commodity in 1983, but in subsequent seasons small scale producers have accounted for the bulk of sales to the marketing board.

The foregoing analysis highlights the tremendous expansion that has taken place since independence in the production and marketed surplus of food and cash crops from the small scale agricultural sub-sector. The explanation for this exceptional increase can probably be found in a combination of factors, including the post-independence government priority placed on developing agricultural and service infrastructure in small scale farming areas, producer price incentives, and the end to the disruption of transport channels caused by the war. Available time series data on some of these factors, including producer prices and market infrastructure, are given in Tables 5 and 4 Appendix 1.

4. DISCUSSION

Our understanding of the recent expansion in marketed surplus from small scale sub-sector is incomplete. A number of important questions arise from the above analysis which require further investigations:

First, to what extent and in what manner does the market participation of small scale producers vary between regions within Zimbabwe and amongst households in the same area?

Second, if expanded market opportunities have had a differential impact on different groups of producers, what are the reasons for this and how does this affect welfare of participating farmers vis a vis other small scale producers?

Third, is the present level of marketed surplus from small scale producers sustainable? What are the determining factors?

Fourth, for which commodities does there exist potential for further increases in marketed surplus from the small scale sector? Is this potential likely to be realised within the existing agricultural policy framework or will it require new development initiatives orientated specifically to areas or groups of farmers not currently participating in the market?
A fuller understanding of the process of integration of small scale producers into the national marketing system, together with answers to the above questions, can only be found through the disaggregation of national statistics. Further, in order to understand some of the observed association between marketed output and government policies, and derive generalizable results therefrom, one also requires more detailed information than is currently available on decision making at the farm household level and the way in which these decisions affect the flow of commodities into the local and national marketing system.

A study which aims to address some of the abovementioned issues has recently been initiated by the author. The proposed investigation will examine the differential impact of government policies regarding price and marketing policies on disaggregated groups of communal sector grain producers. The objective is to develop appropriate socio-economic models of the factors influencing the flow of commodities into the local and national marketing systems and use these to assess impacts of government policies on farm level storage and marketing decisions.

The final section of the present paper provides an outline of the proposed research methodology and working hypotheses. Particular attention has been given to the need to develop a research methodology that takes into account the diverse nature of the communal farming sector and that is capable of producing policy recommendations for different groups of producers.

5. APPROACH AND METHODOLOGY

The research will proceed in six stages:

A. Assessment of the contribution of the communal sector to national grain supplies.

An analysis will be made of recent trends in grain production and official marketings from communal areas. National statistics will be disaggregated along provincial and district lines in order to gain clearer understanding of the location of grain-supplying areas, regional grain self-sufficiency and the geographical distribution of profits or revenues from official marketings.

B. Identification of producer groups within the communal subsector as a basis for analyzing grain marketing decisions.

An important step in explaining the recent substantial growth in grain production in communal areas is to distinguish among various grain-producing systems in these areas. In classifying such systems it would be necessary first to develop hypotheses.
as to the factors influencing production, marketing and storage of grains. Some of the likely influencing factors include: agro-climatic environment, man-land ratio, market and transportation infrastructure, farm-level resource endowments, grain and input prices, and the distribution and adequacy of agro-services.

These hypotheses are amenable to investigation using time series and other supporting data. Subsequently, communal areas would be classified with respect to the major factors influencing production and multi-dimensional criteria developed to form the basis of a typology of grain producers in communal areas. It is anticipated that some of the techniques of economic geography may be appropriate to this stage of the analysis.

A reasonable hypothesis for example is that producers benefiting most from, and responding most to, the increase in support services and market opportunities are those situated in higher rainfall zones and with closer access to marketing board depots.

C. Qualitative characterisation of how producers make storage and marketing decisions in communal areas.

In describing how producers make storage and marketing decisions, it would be necessary to identify the kinds of information producers use and to show how this information is utilised in decision making.

Farmers' behaviour is likely to be governed by the goals they pursue, the way in which they perceive risk, and the manner in which they seek to mitigate the effects of risk. Storage behaviour might also be associated with various characteristics identified in the prior development of a typology of grain producers. For example, storage behaviour might be affected by income level, capital assets (including livestock ownership), size of household, closeness to market, access to credit and other characteristics. It would be useful to identify these characteristics and explore their influence on decision making.

D. Development of socio-economic models (using the results of stage C) to incorporate the demand for and supply of grain storage in communal areas.

While it would be premature at this stage of the research to attempt to formulate a fully specified socio-economic model, some elements of the model are obvious from the outset. Grain-storage decisions are likely to depend on quantities harvested, the farmgate price of grain and of other relevant cash crops, the retail price of maize meal, on-farm storage capacity, household size and composition, income, and various other farm household characteristics such as risk aversion.

Estimation of models for identified types of grain-producing systems in communal areas on the basis of data drawn from farm surveys.
Such socio-economic models will be estimated using data drawn from surveys of a cross-section of farm households. Fieldwork areas will be chosen with reference to the grain production typology of communal areas (from stage C). The surveys will be designed to permit adequate variation in all the factors expected to affect the volume of grain storage. These factors will include, for example, variation in distance to market, income, inventory levels and other producer characteristics.

Two separate questionnaires will be used to collect information on grain production, marketing and storage from farm households:

1. A farm household questionnaire administered at the beginning of the fieldwork and covering such topics as household resources (land, labour, livestock, income), cropping patterns and disposal of grains in the two most recent seasons, and on-farm storage decisions.

2. A monthly farm household questionnaire concerned primarily with household-level grain flows (sales, purchases, borrowings, remittances in kind), household income and expenditure.

Exploration, using the estimated model, of the implications of a range of possible government policy measures on aggregate farm storage and on the volume of grain offered to and demanded from the GMB by different groups of communal farmers. Policies that could be investigated include: farm grain prices, retail maize meal price, cash crop prices, subsidisation of farm storage materials, crop transport costs.

CONCLUSION

Recent trends reveal the considerable economic strength of the Zimbabwe small scale farming sector as manifested in rapidly growing levels of production and significant contribution to marketed surplus. These production gains can be attributed in part to a well-developed agricultural infrastructure, initially constructed to serve the white commercial farming sector, which could be extended relatively easily into small scale production areas following independence. Yet, we have incomplete knowledge of and explanation for the growing integration of small scale producers into the national marketing system. In the past the small scale sector has, due to data limitations, generally been treated as a homogenous entity. As a result, very little is known about the differential impact of expanded market opportunities on different groups of producers. A proposed study to examine the factors influencing the contribution of small scale producers to marketed agricultural output utilising disaggregated national statistics and cross-sectional farm surveys is outlined above. Such research will help to identify strategies relevant to Zimbabwe's national agricultural development objectives in terms of their specific impact on alternative small scale target groups. Further, this Zimbabwean study will provide important information for formulating effective agricultural development policies to overcome the immense problems facing peasant producers in other parts of Africa.
<table>
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<td>1985</td>
<td>180.00</td>
<td>97.20</td>
<td>180.00</td>
<td>97.20</td>
</tr>
</tbody>
</table>

Note: 1. Deflated by all items index for higher income urban families; 1970-1984 (Yearly average) 1985, January-June average

2. Final price excludes the following early delivery bonuses:
   April 1980 - $10/00 tonne
   May 1980 - $5/00 tonne
   April 1984 - $20/tonne
   May 1984 - $15/tonne
   June 1984 - $10/tonne

3. Z$1.00 = US$0.6027 5th November, 1985

SOURCE: Grain Marketing Board and Cotton Marketing Board
### Registered Producers

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Communal Producers</td>
<td>121,508</td>
<td>155,917</td>
<td>175,738</td>
<td>217,619</td>
<td></td>
</tr>
<tr>
<td>Small scale and resettlement producers</td>
<td>65,399</td>
<td>5,515</td>
<td>8,563</td>
<td>17,160</td>
<td>29,124</td>
</tr>
</tbody>
</table>

Notes: 1. Number of registrations with the Grain Marketing Board as at 31st March.

Source: Grain Marketing Board

### Marketing Board Depots

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Grain Marketing Board Total (No.)</td>
<td>20</td>
<td>32</td>
<td>34</td>
<td>37</td>
<td>41</td>
<td>43</td>
<td>44</td>
<td>44</td>
</tr>
<tr>
<td>Situated in Small Scale sub-sector (No.)</td>
<td>0</td>
<td>1</td>
<td>3</td>
<td>6</td>
<td>10</td>
<td>12</td>
<td>13</td>
<td>13</td>
</tr>
<tr>
<td>Cotton Marketing Board Total (No.)</td>
<td>5</td>
<td>5</td>
<td>5</td>
<td>7</td>
<td>14</td>
<td>15</td>
<td>15</td>
<td>16</td>
</tr>
</tbody>
</table>

Source: Grain Marketing Board, Cotton Marketing Board
<table>
<thead>
<tr>
<th>Season</th>
<th>Large scale sub-sector</th>
<th>Small scale sub-sector</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1976/77</td>
<td>342</td>
<td>20</td>
<td>362</td>
</tr>
<tr>
<td>1977/78</td>
<td>359</td>
<td>25</td>
<td>384</td>
</tr>
<tr>
<td>1978/79</td>
<td>352</td>
<td>25</td>
<td>377</td>
</tr>
<tr>
<td>1979/80</td>
<td>328</td>
<td>27</td>
<td>355</td>
</tr>
<tr>
<td>1980/81</td>
<td>401</td>
<td>30</td>
<td>491</td>
</tr>
<tr>
<td>1981/82</td>
<td>436</td>
<td>96</td>
<td>532</td>
</tr>
<tr>
<td>1982/83</td>
<td>372</td>
<td>98</td>
<td>470</td>
</tr>
<tr>
<td>1983/84</td>
<td>361</td>
<td>109</td>
<td>470</td>
</tr>
<tr>
<td>1984/85</td>
<td>315</td>
<td>115</td>
<td>430</td>
</tr>
</tbody>
</table>

Notes: 1. Includes Communal producers, small scale commercial and resettlement farmers.

2. Dramatic increase due to aid programmes and crop package deals available to communal producers.

Source: Zimbabwe Fertilizer Corporation and Windmill (Pvt) Ltd.

2. **Small Farm Credit**

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Loans '000</td>
<td>34,6</td>
<td>46,0</td>
<td>70,8</td>
<td>96,2</td>
</tr>
<tr>
<td>Loan Value Z$ million</td>
<td>14,0</td>
<td>19,2</td>
<td>37,8</td>
<td>56,4</td>
</tr>
</tbody>
</table>

Notes: 1. Short term credit extended to small scale sub-sector by Agricultural Finance Corporation.

Source: Agricultural Finance Corporation