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The Future of Agriculture in Zimbabwe? The Expansion of Contract Farming and Its Impact on Smallholder Income and Production

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Introduction[1]

In 2013, the Zimbabwean Parliamentary Portfolio Committee on Budget, Finance and Investment declared that: "The future of agriculture in Zimbabwe lies in contract farming".[2] Also, while noting that the area planted to major food crops – maize, sorghum and millet – declined by some 22% between the 2012 and 2013 seasons, the then Minister for Agriculture declared that output of other crops was projected to increase due to improvements in financial support through contract farming schemes. He said: "Contract farming has proved to be a formidable funding facility in cotton and tobacco production. Ways of extending contract farming to other crops and livestock are being worked out".[3] The Zimbabwean government's enthusiasm for contract farming is also evident in its revised Agricultural Investment Plan, the ZAIP, which places a major emphasis on a greatly expanded role for contract farming, not only for crops where it has been important in the past – wheat, cotton, tobacco, sugar cane and soya – but also in areas where it has been less important – other grain crops, livestock and horticulture, for example (GoZ 2013).

This enthusiasm for extending the scale of and scope for contract farming in Zimbabwe takes place against the backdrop of and fallout from the country's most recent land reforms. In March 2000, following a decade or more of economic decline, the failure of the 1998 donors conference on land reform and the eventual 'no' vote in the constitutional referendum, decades of pent-up land hunger finally erupted and the country's war veterans led a campaign of land invasions onto white-owned and state-owned land, largely in protest against the state and its failure to deliver on the promises of independence (James 2014). Shortly afterwards, the government implemented the 'Fast Track' land reform programme (FTLRP), which dismantled the predominantly white-owned large-scale commercial farming sector and greatly expanded the base of peasant production, thus radically altering the agrarian structure of Zimbabwe.

Agricultural production declined significantly after 2000, which had an adverse effect on manufacturing, and spread to other sectors of the economy, leading some to proclaim the 'collapse' of Zimbabwe (Richardson 2004). However, as Moyo states, the FTLRP "affected the major crops and livestock differently, particularly those produced by large-scale white farmers" (Moyo 2004: 7). The production of wheat, tobacco, soya beans and sunflower all suffered in terms of both area cultivated and output. However, other crops were less adversely affected. For example, tea, coffee, citrus, forest products and other export crops (excluding tobacco and horticulture) are grown mostly on agro-industrial estates, which were not redistributed during the FTLRP. Moreover, it was smallholders - mostly in the communal areas - who grew the bulk of the national maize crop. In the decade after 2000, as the base of peasant production expanded, the area planted with maize actually increased, but output declined as a result of widespread shortages of inputs (*Ibidem*), as well as the extension of production onto marginal lands and increasing vulnerability to variations in rainfall (Andersson 2007). The wider implications of the FTLRP have been extensively analysed elsewhere (Hammar, Raftopoulos, Jensen 2003; Moyo *et al.* 2009; Scoones *et al.* 2010; Matondi 2012; Mkodzongi 2013; James 2015).

Of particular relevance to this article, however, was the impact of the FTLRP on parastatal institutions and the agricultural policy environment in Zimbabwe. The programme contributed to the near-total collapse of the parastatal institutions that once supported and serviced smallholders, which initially left a vacuum that saw farmers, both small and large-scale, struggling to access inputs, credit and markets. However, since 2009, opportunities for smallholders to participate in contract farming appear to have increased as private finance to agriculture is increasingly being channelled through contract farming companies. It is therefore against this backdrop that the government's enthusiasm for extending contract farming arrangements can best be understood, although the impact on smallholders has received very little attention in the literature on Zimbabwe to date.

This article begins by outlining the concept of contract farming as we have encountered it in our study sites in Shamva and Hwedza districts of Zimbabwe. These farmers were growing both tobacco and cotton under contract when we visited them in 2011 and 2012, and a significant proportion of those who were not farming under contract at that time had done so in previous seasons. Following a brief review of the literature, the article moves to an account of the key factors driving the emergence and expansion of contract farming in contemporary Zimbabwe. This has not been adequately covered elsewhere, and so the article helps to fill this gap. It describes the development of contract production as having unfolded in two 'waves', each of which have coincided with a period of economic liberalisation following land redistribution. The third section describes the data set and methods used before presenting some preliminary analysis of smallholders' participation in contract farming schemes, access to inputs, and the impact of contract farming on income and production. The final section presents some conclusions, highlights remaining questions and makes some recommendations for future research.

Conceptualising and debating 'contract farming'

The diversity of contract farming arrangements makes any general definition problematic, but it is most often seen as a form of vertical integration between agricultural producers and buyer-processors. The most widely cited definition is that provided by Little and Watts (1994: 9) who conceptualise contract farming as "vertical coordination between growers and buyer-processors that directly shape production decisions through contractually specifying market obligations [...] provide specific inputs; and exercise some control at the point of production [...]". Similarly, and building on this definition, James and Kinsey (2013) conceptualise contract farming as being characterised by one or more of the following features: the commitment, whether written or oral, in advance by a buyer or processor to purchase from a grower a given crop area or volume, of a stipulated quality, at a stipulated time and often (but not always) at a predetermined price; the linkage of factor and product markets based on specific production practices and the provision of inputs and/or services by buyer-processors; and a contractual distinction in the apportionment of production and marketing risk.

While this definition provides some conceptual clarity for our study of contract farming in Zimbabwe, it is not without its problems. In particular is the fact that our definition might not exclude many of the experiences of the parastatal marketing boards, which, prior to the implementation of structural adjustment policies, had serviced Zimbabwe's small-scale farmers by providing them with inputs, enforcing commodity standards, providing single-channel marketing facilities and controlling prices. Additionally, it might not exclude the provision of inputs to small-scale farmers by NGOs, or the kinds of patronage networks and informal business arrangements that we discovered in our study sites. For example, in one district we found a Danish NGO, DAPP, distributing inputs for maize and soya bean production, which farmers were expected to repay after the harvest. Similarly, there were cases were farmers received inputs on loan from local MPs and businessmen who expected to be repaid either in cash or kind following harvest. However, these cases were few in number, especially when compared to formal arrangements with contract farming companies for tobacco and cotton.

It is therefore necessary to draw an analytical distinction between these parastatal-NGO-informal typologies and the kinds of formal, often centralised, private-led contract farming arrangements with which this article is concerned. Failure to make this distinction would make it impossible to assess the importance of contract farming in Zimbabwe, because the concept would be in danger of losing all meaning. This article therefore aims to generate insights into the emergence, spread, scale and experiences of private-led contract farming arrangements, with specific emphasis on the two main contract crops: tobacco and cotton.

In our study sites, a number of companies - including Zimbabwe Leaf Tobacco (ZLT), the Mashonaland Tobacco Company (MTC), Cottco (the Cotton Company) and Cargill (an American-based grain and oilseed company) - provide farmers with contracts that meet our definition. In addition to stipulating area, volume, quality and price, these companies provide farmers with the inputs they require, and return after the harvest to collect the produce. Both tobacco and cotton are highly-perishable and require a high-degree of processing - grading, sorting, packaging, etc. - so they must be collected and processed in a timely manner. It is only once the grading process is complete that farmers receive payment minus initial costs.

These contractual arrangements have often been described as 'win-win' scenarios, because contracts provide small-scale farmers with much-needed inputs and credit, and link them to global agro-food markets, while agri-business ensures a steady supply of raw materials without having to invest in large-scale plantations or the supervision of labour (Glover, Kusterer 1990). This is the view of the World Bank, as expressed in the 2008 World Development Report, which reads: "[...] scale economies in processing and marketing exist with fragmenting and shrinking farm size, so institutional innovations such as CF can reduce the transaction costs and risks of smallholders. Linking smallholders to processors and retailers can also create access to more financial capital through banks - and provide technology, extension, and buy-back arrangements, while monitoring food safety" (World Bank 2008: 238).[4]

This mainstream narrative draws heavily on the New Institutional Economics (NIE), which posits that contracts help to overcome market failures and reduce transaction costs associated with agricultural production and marketing in developing countries. After all, agricultural commodities are often highly-perishable, small-scale farmers are normally widely-dispersed and they face numerous challenges in accessing inputs, credit, markets and information (Minot 1986; Grosh 1994). This literature compares different schemes and seeks to learn lessons based on the relative success and failure of various institutional arrangements, which is helpful if contract farming arrangements are indeed increasing in significance in the context of globalisation and expanding market liberalisation, but it often proceeds in an ahistorical and apolitical fashion (Oya 2012).

In contrast to this is the 'win-lose' interpretation of what Oya refers to as 'neo-populist' approaches, which see agri-business winning at the expense of smallholders. In particular, the 'Food First' school assert that contract farming diverts inputs away from food production and into the production of high-value cash crops for export markets, undermining food security (George 1976; Lappé, Collins 1982; Dinham, Hines 1983; Rosset *et al.* 2006; Rosset 2008). This school speaks of 'Food Sovereignty' which is conceptualised as "the right of nations and peoples to control their own food systems, including their own markets, production modes, food cultures and environments [...] as a critical alternative to the dominant neoliberal model for agriculture and trade" (Wittman *et al.* 2010: 2). While it is easy to sympathise with its call for environmental and social justice for peasant farmers, the emphasis in this approach in on the so-called 'peasant way', which has been criticised for dismissing important elements of agrarian political economy and failing to differentiate between heterogeneous groups of small-scale farmers (Bernstein 2013).

A third strand of literature, from a political economy perspective, instead emphasises political drivers in its attempt to understand the emergence, expansion and outcomes of contract farming among groups of farmers who are often highly-differentiated in terms of class, power and gender (Little, Watts 1994; Porter, Phillips-Howard 1997; Ochieng 2010). This literature includes a case study of sugar cane, tea and cotton production in Zimbabwe (Jackson, Cheater 1989, 1994), which shows that the government of the day promoted contract farming for political as well as economic reasons, but questions the viability of these specific contract farming arrangements. The NIE has been unfairly critical of this literature for its case study approach, which some have suggested fails to explain the variation that exists in contract farming practices (Grosh 1994; Tiffen 1995).

In a recent comprehensive survey of the literature, Oya (2012: 6) identifies two main trajectories within the current literature: a growing body of mainstream institutional literature and policy-orientated evaluative work, on the one hand, and a significant literature on the governance of global value chains and the role of small-scale producers in these chains, on the other (Daviron, Gibbon 2002; Larsen 2006). This article falls mostly into the former strand. In terms of evaluative case studies, there are a number of empirical studies that appear to show positive income effects of contract farming among smallholders in African countries (Warning, Key 2002; McCulloch, Ota 2002; Bolwig *et al.* 2009; Bellemare 2012), while others have shown gains in terms of subjective well-being (Dedehouanou *et al.* 2013). However, the general consensus from a variety of case studies is that outcomes are highly-varied (Oya 2012).

To date, however, there has been very little research on private-led contract farming in contemporary Zimbabwe. The above mentioned study by Jackson and Cheater focuses partly on Zimbabwe's private sugar cane estates, where contracted outgrowers are in the minority. This therefore differs from the contract farming arrangements in our study sites, where a number of companies - ZLT, MTC, Cottco and Cargill - now operate. Some studies have looked at the issue from the point of view of these companies, pointing to several examples of farmer and company default (SNV 2007), but few have examined the recent expansion of private-led contract farming arrangements from the perspectives of small-scale farmers, and what these commercial relationships might mean to them and for their livelihoods, more generally. In addition, limited attention has been given to the role of contract farming in the emergence of a new group of middle farmers in Zimbabwe, and what this might mean for the politics of the countryside and the development of capitalism.

There are some exceptions, where, for example, studies have looked at the motivations behind smallholder participation in export supply chains for vegetables (Masakure 2004; Masakure, Henson 2005) and Dzingirai's (2003) case study of Canners (PVT) Ltd and its operations in Mushandike resettlement area in Masvingo; but neither of these looks at the main contract crops, tobacco and cotton. Moreover, most of the major contributions to the literature on land and livelihoods after the FTLRP make only transitory reference to contract farming. Scoones *et al*. (2010: 160-161), for example, make only passing reference to the role of contract companies and only then in relation to cotton production. Matondi (2012: 158), in a more recent contribution, states that contract farming in Mazowe was in decline during the hyperinflationary period, but, surprisingly, fails to mention the rapid increase in contract production in the years since, especially for tobacco. Hanlon *et al*. (2013: 115), on the other hand, claim that "Contract farming has made a major difference for small farmers", but they offer no empirical evidence to support the assertion. Admittedly, while some small-scale farmers were already farming under contract during this time, these studies were based mainly on data collected before private-led contract arrangements began to take-off again following dollarisation and the re-liberalisation of markets in 2009.[5] In short, there has been no clear account of the key factors driving the emergence and expansion of contract farming in Zimbabwe to date; nor has there been any serious study of the smallholder experience. The following sections offer an attempt to fill some of these gaps in the literature.

Two waves of private-led contract farming in Zimbabwe: key factors driving its emergence and expansion

Contract farming is not new to Zimbabwe. It began in the 1950s, usually linked to state-owned or state-controlled estates, with sales going through the state marketing boards. To some extent then, this might be considered the first wave of contract farming in Zimbabwe, although it is not the kind of private-led contract farming with which this article is concerned, so it will not be discussed here. Instead, the article focuses on the two waves of private-led contract farming that have unfolded since 1980.

The first wave gained momentum in the 1990s, alongside economic and structural adjustment policies, and shortly after the first phase of the land reform and resettlement programme came to an end. Throughout the 1980s and 1990s, farmers - large and small - were growing sugar, tea and cotton under various forms of contractual agreements, as well as burley tobacco, vegetables, sugar beans and dryland castor, albeit to a lesser extent (Jackson, Cheater 1994). Flue-cured tobacco was also increasingly being grown by farmers in the original resettlement areas.

In 1990, Zimbabwe agreed to implement the Economic and Structural Adjustment Programme (ESAP), in large part due to the recognition that economic growth rates could no longer sustain the post-independence improvements in health and education. Beginning in 1991, a series of marketing reforms resulted in the liberalisation of trade and foreign exchange controls, as well as the removal of price and wage controls. As Kinsey (2010) has highlighted, these reforms were crucial in dismantling the monopsonistic commodity marketing system, which saw Zimbabwe move away from a single channel of marketing to multiple channel arrangements. The parastatal marketing boards, such as the Cold Storage Commission, the Cotton Marketing Board (CMB), and the Dairy Marketing Board, were privatised and forced to compete with other private commodity traders. Moreover, government spending was also reduced as a result of ESAP and many formerly state-funded parastatal marketing outlets were closed, primarily in marginal producing areas. In response to these reforms and the closure of local outlets, many small-scale farmers began to turn away from the parastatals to other marketing outlets. Throughout the 1980s, for example, the state-controlled Grain Marketing Board (GMB) and the CMB (now Cottco Holdings Ltd) were by far the largest buyers of grain and cotton, but, as Kinsey (2010) has shown in earlier work, the proportion of farmers using these outlets plummeted dramatically by the end of the 1990s, while private traders increased in importance. This process may therefore represent the decline of an older, state-controlled form of contracting, and the emergence of private-led contract farming in Zimbabwe. It is for this reason that we suggest the stage was set in the 1990s for the rapid expansion of contract farming that would take place after 2009.

However, the FTLRP, which began in earnest soon after the government was defeated in the constitutional referendum of February 2000 (the first defeat at the polls since gaining power in 1980) represented a major shift in agricultural policy in Zimbabwe. A sharp reduction in agricultural output and foreign investment exacerbated economic decline in the years that followed, contributing to the near-total collapse of the remaining parastatals and halting the expansion of private finance in agricultural production and marketing.

As Scoones *et al.* (2010: 99) note: "The agricultural policy environment until 2009 was characterised by heavy-handed state intervention funded through quasi-fiscal means which distorted markets and incentives and undermined the economy". In particular, the reintroduction of price controls led to input supply shortages which forced farmers to the black market where inputs were being sold at prices far higher than the official gazetted prices. The loss of the farms that the banks had previously accepted as collateral, but which were now being occupied and redistributed under the FTLRP, meant that financial institutions were unwilling, and often unable, to lend to those who had taken over the former commercial farms. Moreover, the GMB, which continues to be wholly state-owned, failed to pay farmers, in some cases for more than two years, which meant that there was little incentive to produce grain over and above subsistence needs, while those who did produce a surplus struggled to get their produce to the marketplace due to deteriorating infrastructure and the unwillingness of private transporters to risk travelling to remote rural areas due to high fuel costs and poor roads (James, Kinsey 2013: 10-11; Scoones *et al.* 2010). Therefore, while it was the structural adjustment era that *set the stage* for the expansion of private-led contract farming in Zimbabwe, it was the so-called 'crisis decade' that ultimately *created the conditions that almost made it an imperative* if agriculture was to return to anything like its economic significance prior to 2000.

The second wave of contract farming thus began to unfold in the years after 2009. Whereas the FTLRP disrupted agricultural production and marketing channels, which had a devastating impact on the wider economy, the establishment of a government of National Unity in 2008, and the dollarisation of the economy and the re-liberalisation of markets in 2009, saw a return to political and economic stability, which resulted in renewed opportunities for the further expansion of contract production. Given the desperate conditions of the 'crisis decade', Moyo and Nyoni write that it was not surprising that private capital became increasingly important in rebuilding the agricultural sector after 2009, asserting that: "[...] contract farming became central to the financing of smaller and middle-scale farmers, 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 capital relationships between large-scale farmers and banks towards bonding more farmers with contracting intermediaries. Before 1986, the government had been the major lender. When foreign currency and agricultural markets were re-liberalised [in 2009], agricultural contractors escalated such pre-financing arrangements. Private bank credit to agriculture increased to over 300 million dollars in 2010, *but over 60% of this amount went to contractors*" (Moyo, Nyoni 2013: 236, my emphasis).

The number of private registered tobacco contractors rose from 3 in 2003 to 15 in 2014, according the Tobacco Industry Marketing Board (TIMB 2014). Similarly, the number of private cotton contractors increased to 13 in 2011. Today, the bulk of the national tobacco and cotton crop is being sold by small-scale farmers to private-led contract farming companies and other private traders, including local firms and entrepreneurs, as well as foreign-based multi-national corporations from the USA, China and India (Moyo, Nyoni 2013; James 2015).

It is largely due to the finance provided by contract providers that tobacco production has recovered in recent years. Prior to 2000, some 97% of the tobacco delivered to the sales floors was produced by white commercial farmers (IRIN 2011).[6] Throughout the 1990s tobacco production made significant contributions to GDP and export revenues. However, as a result of the radical restructuring of the tobacco sector under the FTLRP, national output plummeted from a peak of 237 million Kg in 2000-1 to a low of 48.8 million Kg in 2008. Since 2009, however, national output has increased steadily, and in 2014 output returned to pre-2000 levels, reaching 216 million Kg. In contrast to the situation prior to 2000, over 90% of tobacco farmers are now black small-scale producers, and of all tobacco sold to the market in 2014, 76.5% was sold by smallholders to private buyer-processors (TIMB 2014).

In addition to tobacco (and cotton), it is now reported that a variety of crops are being grown under contract in Zimbabwe. Overall, it is estimated that 50 firms contracted approximately 328,000 small farmers to produce a variety of crops on some 628,000 ha of land during the 2011-12 season (Irwin *et al*. 2012: 1). If these numbers are correct, then this would mean only about 2-3% of smallholder land was being farmed under contract in 2011-12, which lends credence to Oya's doubts about the quantitative significance of contract farming arrangements, at least in terms of the total land area involved. However, it would also mean that up to 25% of Zimbabwe's small-scale farmers were farming under contract during this season, which is a significant percentage of the farming population and therefore deserves attention.

Data collected during a period of fieldwork in 2012 sheds some light on smallholders' experiences of contract farming in Shamva and Hwedza during the 2011-12 growing season. The following section describes the data and methods used before turning to some preliminary analysis of smallholders' participation and access to inputs, as well as the impact of contract farming on crop income and production.

Farming under contract in Shamva and Hwedza: Data and Preliminary Findings

The empirical analysis used in this paper is based largely on data gathered in 2011-12, during a period of 18 months of fieldwork in Zimbabwe. The data gathered during this time both build on and extend earlier work undertaken by the Zimbabwe Rural Household Dynamics Study (ZRHDS) team. The ZRHDS began monitoring the development of 400 resettlement households shortly after Zimbabwe implemented the first phase of the land reform and resettlement programme in 1980. The three original resettlement schemes covered by the ZRHDS are each located in different districts. The data used in this article focus on two of these: Shamva and Hwedza. Mupfurudzi resettlement area is located in Shamva district in Mashonaland Central province and is about 120 km from the capital city, Harare. Sengezi resettlement area is in Hwedza district in Mashonaland East, about 150 km from Harare. The locations of each site, along with the third site in Makoni district, are shown in Map 1, below. Shamva and Hwedza are broadly representative of two of the five agro-ecological zones, or 'natural regions', of Zimbabwe (i.e. NRs I-V), which are based on measures of climate, soil type and average annual rainfall. NRI is the most favourable agricultural land, and NRV is the least favourable. Shamva belongs mostly to NRII and Hwedza is NRIII, broadly speaking. Therefore, each area is suited to different types of agricultural production (see e.g. Weiner *et al.* 1985).

These resettlement areas – Mupfurudzi (Shamva) and Sengezi (Hwedza) – were randomly selected from among the earliest resettlement areas. The villages within each scheme were also randomly sampled and an attempt was made to survey all resident households in each of the chosen villages. In the end, the ZRHDS team surveyed 230 households in nine villages in Mupfurudzi and 100 households in five villages in Sengezi.[7] Each village belongs to what is officially referred to as the 'Model A' variant of the resettlement programme, which Kinsey describes as comprising "nucleated village settlements" (1983: 172) where each household is allocated a piece of arable land of approximately five ha (12 acres) with access to communal grazing land and a residential stand. In this article, these are referred to as the old or original resettlement areas (ORAs).

In 1997, the survey was extended to include 150 households from six communal areas (CAs) adjacent to each of the three ORAs, bringing the total number of households to 550.[8] For each ORA, the two communal villages that provided the most settlers at the time of resettlement were chosen and 25 households from each were then surveyed.

In 2012, the survey was extended again to include 166 households from four villages in the 'new' resettlement areas (NRAs) created during the FTLRP. Three of these 'new' villages - North Star, Golden Star and Chiraramo - are located in Shamva and the other - Bita - is in Hwedza. It was not possible to extend the survey to the NRAs in Makoni district, due to time and budgetary constraints, which is why the analysis used in this article, which is mostly based on comparisons between different settlement types, focuses only on Shamva and Hwedza. It was also not possible to randomly sample A1 villages due to barriers to access given heightened political tensions in the run-up to the election, the exact date of which was then unknown. Instead, the 'new' villages were chosen from among nearby 'fast track' farms to which many of the children of the original ZRHDS households migrated in the early 2000s.

Map 1: Locations of the original ZRHDS sites

Map 2: Locations of the new A1 villages[9]

The level of rapport that exists between the original farmers and the ZRHDS team facilitated our access to the 'new' villages, each of which belongs to the A1 model of the FTLRP, which is essentially the same as the Model A scheme outlined above. The locations of these A1 villages are shown in Map 2 (above) and the size and distribution of the sample used in this article is shown in Table 1, immediately below.

Table 1: Size and distribution of sample by natural region and settlement type

			Model			Total
			ORA	CA	NRA	
NR	Natural region 2	Count	225	40	128	393
		%	71.4	51.3	77.1	70.3%
	Natural region 3	Count	90	38	38	166
		%	28.6	48.7	22.9	29.7%
Total		Count	315	78	166	559
		%	100.0	100.0	100.0	100.0

As a result of the sampling methods used to select households in the NRAs, the analysis used here may suffer from selection bias, meaning that the sample is not properly representative of the population, but given that accurate population statistics are almost impossible to obtain, it is not intended that inferences to the population as a whole should be made. While the results of analysing this data set cannot be generalised, they are no less enlightening when it comes to our own study sites. Moreover, the results of analyses undertaken using other parts of this data set, which appear at length elsewhere (James 2014; 2015), are broadly similar to other studies of NRAs in other parts of the country (Moyo *et al.* 2009; Scoones *et al.* 2010; Matondi 2012; Mkodzongi 2013).

A second factor that must be taken into account is that households in NRII are over-represented in the sample. This can be corrected using a series of sample weights, but given the lack of accurate national level statistics, this is done in such a way as to allow for within sample comparisons between resettlement and communal households. The weights used are shown in Table 2 (below). These result in the weighted number of households in each settlement type being identical in each natural region, allowing us to generate summary statistics for the means of ORAs, NRAs and CAs, without a bias towards resettled households in NRII, where agricultural conditions are more favourable (Hoogeveen, Kinsey 2001).

Table 2: Sample weights to correct for sampling errors

			Model		
			ORA	CA	NRA
NR	Natural region 2	Weight	1.00	1.00	1.00
	Natural region 3	Weight	2.50	1.05	3.37

The inclusion of ORAs, NRAs and CAs in the data set thus allows us to compare a range of variables between very different groups of farmers, those who received land through the land reform programmes in the 1980s and 2000s, and those who did not. These farmers differ in terms of available land, cattle and asset ownership, and access to services, with resettlement farmers tending to fare better than their communal counterparts in most respects (Scones *et al.* 2010; James 2015).

For the first time in 2012, the ZRHDS survey captured data on contract farming. We asked a number of questions, including, for example, who is engaged in contract farming and why; what are the terms of these contracts; what do farmers receive in the way of inputs, credit and other support services; and what challenges have they faced while farming under contract. In addition to this, the survey captured data on agricultural production and income from crop sales, as it has done since 1983.

Table 3 (below) shows the results obtained for the distribution of contracts by settlement type and natural region. The data show statistically significant results. In other words, both old and new resettlement farmers were significantly more likely to be farming under contract in 2011-12 than their communal counterparts. Overall, 30% of ORA farmers and 37.5% of NRA farmers reported having a contract during that season, compared to only 8.8% of communal farmers. There were also significant differences between natural regions, with farmers in NRII significantly more likely to report having a contract in 2011-12 than those in NRIII, across all three settlement types.

Table 3: Prevalence of contracts by settlement type and natural region, 2011-12 (%)

NR			Model			Total
			ORA	CA	NRA	
Natural region 2	Contract	No	57.8	87.5	40.6	55.2
		Yes	42.2	12.5	59.4	44.8
	Total		100.0	100.0	100.0	100.0
Natural region 3	Contract	No	82.2	95.0	84.4	84.2
		Yes	17.8	5.0	15.6	15.8
	Total		100.0	100.0	100.0	100.0
Total	Contract	No	70.0	91.2	62.5	69.7
		Yes	30.0	8.8	37.5	30.3
	Total		100.0	100.0	100.0	100.0

Source: 2012 survey (weighted n=786). Total: $\chi^2(2)=23.904$ p=.001; $\varphi_c=.174$, p=.001

Table 4: Of those not farming under contract in 2011-12, how many have had a contract in at least one season since 2009? (%)

NR			Model			Total
			ORA	CA	NRA	
Natural region 2	Previous Contract	No	31.5	48.6	32.0	34.4
		Yes	68.5	51.4	68.0	65.6
	Total		100.0	100.0	100.0	100.0
Natural region 3	Previous Contract	No	63.4	78.4	84.3	71.9
		Yes	36.6	21.6	15.7	28.1
	Total		100.0	100.0	100.0	100.0
Total	Previous Contract	No	50.3	63.9	67.7	57.1
		Yes	49.7	36.1	32.3	42.9
	Total		100.0	100.0	100.0	100.0

Source: 2012 survey (weighted n=546). Total: $\chi^2(2)=14.571$ p=.001; $\varphi_c=.163$, p=.001

While the majority, in all cases, was not farming under contract during the 2011-12 season, the data show that significant numbers had taken a contract at some point since 2009. In NRII, about 68% of old and new resettlement farmers and 51.4% of communal farmers reported having previously held a contract. In NRIII, on the other hand, the trend is reversed with the majority, across all settlement types, claiming not to have taken a contract during any of the seasons since 2009. However, even in NRIII significant minorities still claimed to have farmed under contract in at least one of those years. Overall, almost 43% of those who were not farming under contract in 2011-12, had done so at least once since 2009.

One possible explanation for lower rates of participation in NRIII, across all settlement types, might be that these households are all within very close proximity to a small urban area, where ready access to markets for inputs and produce perhaps obviate the need for contracts. Another explanation might simply be that the soil type in these areas is not suitable for all types of crops (as shown for cotton below) and comparatively poorer rainfall in NRIII, compared to NRII, increases production risk due to drought. In addition to this, one explanation for lower participation rates in the communal areas might be that male heads of household, who would typically be the main signatories to agricultural contracts, are so often resident elsewhere (James, Kinsey 2013).

As noted earlier, these contracts are for tobacco and cotton only. Table 5 (below) shows the distribution of contracts for each crop, again by settlement type and natural region. The data are again revealing. First of all, probably due to agro-ecological conditions, no cotton was grown by the farmers in our study sites in NRIII, meaning that 100% of the contracts we identified in that region were for tobacco. It is also worth noting that only one communal farmer was growing tobacco in NRIII and none in NRII.

Table 5: Percentage of contracts for each crop (tobacco and cotton) by settlement type and natural region, 2011-12 (%)

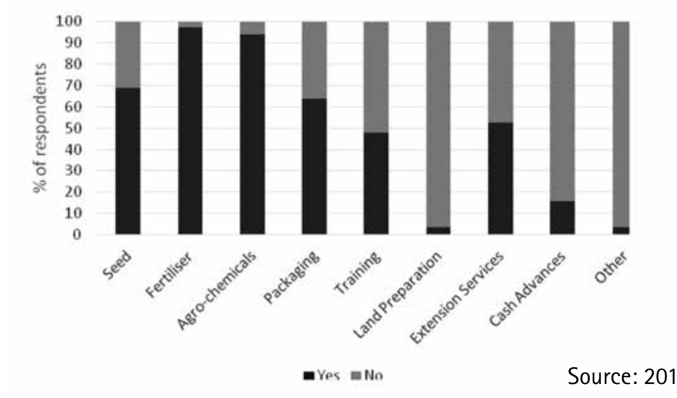
NR			Model			Total
			ORA	CA	NRA	
Natural region 2	Crop	Tobacco	39.8	--	6.3	23.7
		Cotton	60.2	100.0	93.7	76.3
	Total		100.0	100.0	100.0	100.0
Natural region 3	Crop	Tobacco	100.0	100.0	100.0	100.0
	Total		100.0	100.0	100.0	100.0
Total	Crop	Tobacco	58.6	16.7	25.3	43.6
		Cotton	41.4	83.3	74.7	56.4
	Total		100.0	100.0	100.0	100.0

Source: 2012 survey (weighted n=233). Total: $\chi^2(2)=27.055$ p=.001; $\varphi_c=.341$, p=.001

In NRII, contracts for cotton production were more prevalent, accounting for over 60% of contracts in the ORAs and 93.7% in the NRAs. Overall, however, tobacco contracts were more prevalent in the ORAs, while contracts for cotton production are more common in the CAs and NRAs. Altogether, about 44% of contracts were for tobacco and 56% for cotton.

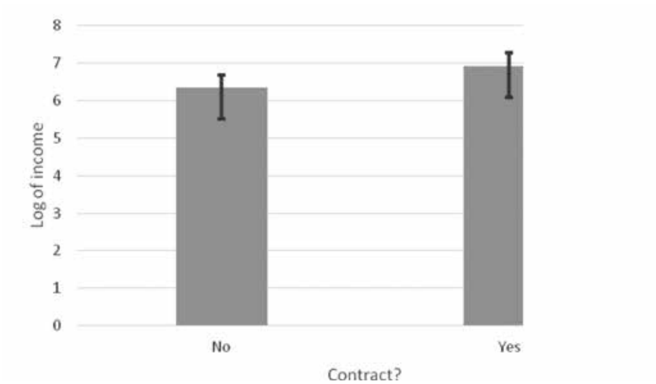
Our data also captured farmers' motivations for entering into contracts and, similar to other empirical studies from Zimbabwe (Masakure, Henson 2005), the primary motivators were to improve access to agricultural inputs (84.5%) and increase income from crop sales (6.2%) (unweighted n=194). Surprisingly, responses related to boosting agricultural production were mentioned by less than 1% of farmers. The preoccupation with improving access to agricultural inputs is no doubt a condition of the economic situation throughout the post-2000 period, which, as established earlier, led to widespread shortages of agricultural inputs and high prices. Given that these are the primary factors driving smallholders' participation, the following set of analyses offer some preliminary findings for smallholders' access to inputs through contracts, as well as a comparison of mean income and yields between contract and non-contract farmers.

Figure 1: Receipt of inputs and services through contracts, 2011-12



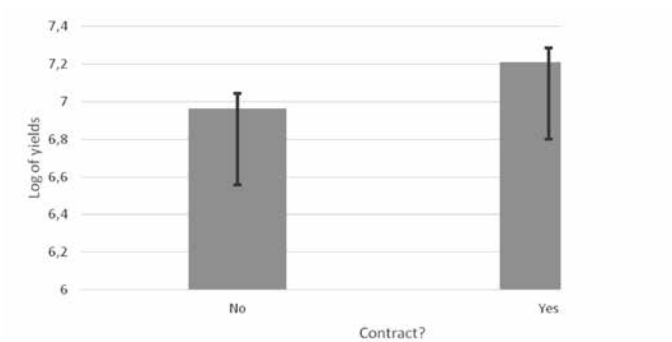
Source: 2012 survey (weighted n=233)

Figure 2: Difference in mean for the log of crop income between contract and non-contract farmers, 2011-12 (with 95% CIs)



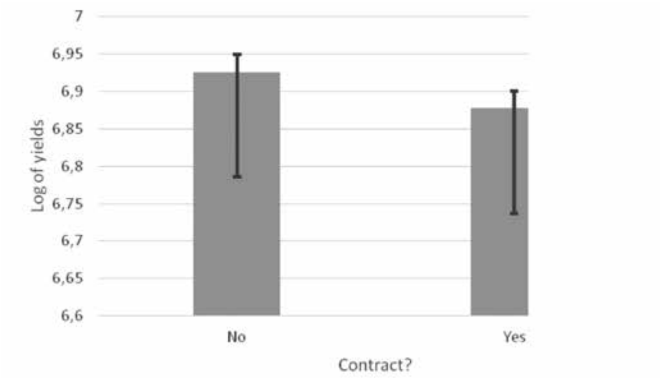
Source: 2012 survey (weighted n=447). *t*(445) = 4.609, p=.001

Figure 3: Difference in the mean for the log of tobacco yields between contract and non-contract farmers, 2011-12 (with 95% CIs)



Source: 2012 survey (weighted n=195). *t*(193) = 2.919, p=.004

Figure 4: Difference in the mean for the log of cotton yields between contract and non-contract farmers, 2011-12 (with 95% CIs)



Source: 2012 survey (weighted n=200). *t*(198) = 0.507, p=.613

First of all, Figure 1 shows that almost 70% of contracted farmers had access to certified seed through contracts in 2011-12, while almost all contract growers in our study sites had access to fertilisers and agro-chemicals. Almost two thirds received packaging (probably for cotton), while about 50% received some kind of training and/or extension services. Few received cash advances (usually reserved for those with a good credit record), and fewer still received assistance with land preparation. Other forms of assistance include the provision of diesel for tractors and coal for curing tobacco. However, while most farmers are at least receiving seed, fertiliser and agro-chemicals, we heard repeated complaints that inputs were not delivered on time, or that the inputs provided were insufficient in terms of quantity and/or quality. Similar complaints have also been heard from elsewhere in the country (AgriNews 2013).[10]

Figure 2 (above) shows the difference in the mean for the log of income from crop sales for both contract and non-contract farmers.[11] The data used include self-reported crop income figures for all crops sold by households in the 2011-12 growing season. There were no significant outliers. The results of an independent samples t-test show a statistically significant difference in the mean for the log of income between the two groups, with contract growers obtaining higher incomes from crops sales, on average, compared to non-contract growers. The data show that the average income from the sale of crops in 2011-12 was 1,771 US dollars for contract growers (the median was 650 US dollars), compared to a mean of just 554 US dollars for non-contract growers (with a median of zero).
Figures 3 and 4 (below) show the mean for the log of tobacco and cotton yields per ha, again for both contract and non-contract growers. First of all, the data show that there is a statistically significant difference in the mean for the log of tobacco yields per ha between the two groups. On average, contract growers produce 1,631 kg of tobacco per

ha, compared to 1,200 kg per ha for non-contract growers. However, the results for the mean of the log of cotton yields show no statistically significant difference between contract and non-contract growers. The former achieved average yields of 1,158 kg of cotton per ha while the latter realised 1,198 kg.
These preliminary results tell a mixed story. On the one hand, there appear to be some benefits for small-scale farmers in terms of access to inputs and higher incomes. There also appear to be some benefits in terms of production yields, at least for tobacco. On the other hand, the benefits, if they exist, do not appear to be universal. The data for this article, however, is limited to only one agricultural season, and, for this reason, a number of questions remain. The final section highlights some of the remaining questions and makes some recommendations for future research.

Conclusions and recommendations

This article has presented an account of the emergence and expansion of contract farming in Zimbabwe, asserting that this can best be understood as having unfolded in two waves since 1980, both of which coincided with a period of economic and market liberalisation following land redistribution. The most recent expansion of contract farming has taken place in the years since 2009, during which the number of contract farming companies for tobacco and cotton have increased and significant numbers of smallholders are now farming under contract. Our data for 2011-12 show that this is mostly concentrated in the resettlement areas and in better agro-ecological regions, compared to households in the communal areas and other less favourable agricultural regions. Another striking finding is the percentage of households who were not farming under contract in 2011-12, but who were doing so in a previous season. This would appear to suggest that while contract farming may be becoming an increasingly important livelihood strategy for many smallholder farming households, it is only one part of a more complex livelihoods portfolio. Moreover, the farmers in our study sites appear to be opting-in and out of contract farming as their needs dictate, suggesting that the situation is much more fluid thanmight at first be expected.
The farmers we spoke to also indicated that the promise of agricultural inputs and higher incomes from cash crop production were the main factors driving their participation in contract farming, which is similar to the findings of other studies. Boosting agricultural production, however, was mentioned by far fewer people than might be expected. The analysis used in this paper shows that most farmers receive certified seed, fertilisers and agro-chemicals, although interviews reveal a number of complaints around issues of quantity, quality and the timeliness of deliveries and collections. In addition, preliminary analysis appears to show that incomes from the sale of crops were, on average, higher for contract growers than for non-contract growers. Tobacco yields also appear, on average, to be significantly higher for contract growers, while there appears to be no significant difference in yields between contract and non-contract growers of

cotton. However, while this article takes an important first step in understanding the recent expansion of contract farming and smallholder participation in Zimbabwe, many unanswered questions remain.

In line with the wider literature on contract farming, there are two broad directions in which future research on this subject might progress in the case of Zimbabwe. First, we should continue to monitor contract farming, as it continues to unfold, and its impact on income, food and cash crop production, and rural livelihoods, more generally. The data used in this article are limited to only one agricultural season, and while this sheds some light on the situation in Shamva and Hwedza for this one point in time, longitudinal data from these areas and other parts of the country would enable us to explore the variations in contract production arrangements that exist between different sites and monitor trends over time.

Of particular interest here is the apparent concentration of contract farming in the resettlement areas of Shamva and (to a lesser extent) Hwedza. Resettlement farmers are highly-differentiated, but they do tend on average to be better-off than their communal counterparts in the first place, which has been covered extensively elsewhere (Scoones *et al.* 2010; Dekker, Kinsey 2011; James 2015). The evidence from other case studies tends to show that it is wealthier farmers that benefit most from contract farming. Barrett (2008), for example, suggests that, at least in the case of staple grains, market sales through food commodity value chains tend to benefit a relatively small group (i.e., less than 10%) of comparatively well-capitalised farmers located in favourable agro-ecological areas. Although evidence is scarce, the implication is that "gains from agrifood value chain transformation accruing to net sellers in the form of higher profits will likely concentrate in the hands of a relatively modest share of the farm population in the developing world" (Barrett *et al.* 2012: 727). It remains to be seen whether the value chains from different commodities have differential impacts in the rural communities of Zimbabwe.

In a study of tobacco production in Malawi, Pauline Peters (2006) has shown that small-scale tobacco farmers saw their incomes rise by some 72% during the 1990s, while at the same time the gap between families in the top and bottom income quartiles increased significantly as a result. Similar 'developments' may already be underway in Zimbabwe, so future research should aim to investigate these dynamics further in order to determine who benefits most from contract farming and what will be the wider implications for local and regional differentiation. This might also include examining the effects of the gains to be had in terms of improved nutritional status and educational attainment by smallholders' children, as well as smallholder asset accumulation, and so on (Barrett *et al.* 2012). Scoones (2014) has shown that there appears to be a new, emerging middle group of farmers accumulating from below, who are changing the politics of the Zimbabwean countryside. The role of contract farming in this process of class formation and agrarian change is yet to be fully examined.

Future research must also include an in-depth analysis of the new labour relations that have emerged since the FTLRP and their impact on rural livelihoods, given the centrality of labour exploitation to contract farming.

A more nuanced study that differentiates between these different groups of farmers might also assess the risks faced by different groups when farming under contract, the strategies used by different farmers to mitigate these risks, and whether there are specific combinations of crops, assets, capabilities and strategies that produce more or less successful outcomes. This should also include differentiating along the lines of power, class and gender, and examining the extent to which participation in contract farming leads to shifting dynamics, especially within households. All of these questions are important considerations for ongoing evaluative studies of contract farming in Zimbabwe.

The second broad theme is that of global value chains and the role of smallholders in the future of African agriculture. As Scoones *et al.* put it: "The Zimbabwe case [...] offers important insights into wider international discussions about agrarian futures [...] based (largely) on a smallholder model" (2010: 2). While these debates are not directly linked to contract farming *per se*, the Zimbabwe case is itself distinctive and thus informative, because unlike other land reform cases it has seen the dismantling of large-scale commercial farms for redistribution to small-scale 'peasant' production, and so it may hold lessons for alternative smallholder paths to economic development and the transition to capitalism (Bernstein 2004), while also contributing to debates around 'deagrarianisation' (Bryceson 2002; 2009) and 'repeasantisation' (van der Ploeg 2008; 2013).

In short, it is far from clear whether the future of agriculture in Zimbabwe does indeed lie in contact farming, as the Budget, Finance and Investment Committee suggested in 2013, especially given the way in which farmers appear to opt in and out. What is clear is that the expansion of and enthusiasm for contract farming solutions has not been accompanied by any serious study of smallholders' participation, or the implications of contact farming for income, production, livelihoods or rural and economic development, more generally. The analysis in this article offers an important first step - showing some potential positive outcomes for income and tobacco yields, in particular - but many unanswered questions remain.

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NOTES:

1 - This paper is partly the result of an earlier collaboration with Bill Kinsey. I am also grateful to the two anonymous reviewers for their comments. The usual disclaimers apply.

2 - Financial Gazette, 2013. (Online): http://www.financialgazette.co.zw/prioritisecontract-farming/ [Accessed 14 04 2013].

3 - *2013 crop hectarage down: Made*, in «The Herald» (online), 17 February 2013: http://www.herald.co.zw/2013-crop-hectarage-down-made/ [Accessed 25 02 2013].

4 - The position of the World Bank and its support for contract farming has been criticised by Oya (2011, 2012) for its contradictions and incoherence.

5 - The exception is the book by Hanlon *et al.* (2013) which is based on limited data, mostly from a few farms in Mazowe district, collected in 2010 and 2011.

6 - *ZIMBABWE: Small-scale farmers choose tobacco over maize*, "IRIN News" 2011: http://www.irinnews.org/report/94074/zimbabwe-small-scale-farmers-choose-tobacco-over-maize (Retrieved on 06, 22, 2014).

7 - The other 70 households that make up the total of 400 are located in Mutanda resettlement area in Makoni district, but these are not used in this analysis for reasons explained below.

8 - Once again, 50 of these were chosen from two communal villages in Makoni and are not sued here.

9 - Maps created by R. Kapumha, University of Zimbabwe.

10 - AgriNews May (2013). *Issue No. 3.* Harare: Zimbabwe Farmers' Union (ZFU).

11 - The data for crop income are highly-positively skewed, so the log of income is used which has the effect of transforming the data to be normally distributed. The same is true for tobacco and cotton output below.

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