



Balancing Tobacco Dependency and Agricultural Diversification: Strategies for Sustainable Development and Trade in Zimbabwe

A Discussion Paper

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Acronyms and Abbreviations

ABBREVIATION	MEANING
AFCFTA	African Continental Free Trade Area
AMA	Agricultural Marketing Authority
CBOs	Community-Based Organisations
COMESA	Common Market for Eastern and Southern Africa
FAO	Food and Agriculture Organisation
GDP	Gross Domestic Product
GoZ	Government of Zimbabwe
LFSP	Livelihoods and Food Security Programme
NAPF	National Agriculture Policy Framework
NDS1	National Development Strategy 1
NGOs	Non-Governmental Organisations
PFUMVUDZA	A climate-smart agriculture programme promoting sustainable farming practices among smallholders
RBZ	Reserve Bank of Zimbabwe
RDCs	Rural District Councils
SADC	Southern African Development Community
SDGs	Sustainable Development Goals
SMEs	Small and Medium Enterprises
TIMB	Tobacco Industry and Marketing Board
VIDCOs	Village Development Committees
WTO	World Trade Organisation

Executive Summary

Zimbabwe's agricultural sector remains a cornerstone of the country's economy and rural livelihoods, with tobacco leading as its most significant contributor to export earnings. Tobacco farming continues to play a prominent role in providing foreign currency and sustaining rural economies. However, heavy reliance on tobacco presents several systemic vulnerabilities, including limited agricultural diversity, food insecurity, environmental degradation, and susceptibility to shifting global market trends.

As a result, the need to diversify agricultural production and trade has become increasingly urgent, paving the way for strategies that emphasise sustainable development and economic resilience.

To strengthen the evidence base on the interaction between Zimbabwe's agricultural and tobacco policies and trade dynamics, the Training and Research Support Centre (TARSC), with support from McGill University (Canada), conducted a desk review in 2024 examining opportunities for transitioning from

tobacco farming through a trade and industrialisation lens. The analysis revealed several key findings. The National Agriculture Policy Framework (NAPF) provides the strategic foundation for Zimbabwe's agricultural transformation. Policies such as the Pfumvudza Programme and the Bioeconomy Strategy have introduced climate-smart practices, aiming to bolster production and encourage diversification into resilient and high-value alternative crops. However, gaps in institutional coordination and implementation limit the scale of these policies' impact. Sub-national governance structures, including Rural District Councils (RDCs) and extension services offered through the decentralised governmental structures, play essential roles in supporting farmers but are often constrained in their efforts to help farmers establish viable and sustainable agricultural practices by broader development agendas and a complex political economy. For example, disparities in market access and infrastructure create inequities and prevent smallholder farmers from capitalising on export opportunities for crops beyond tobacco.

In addition, Zimbabwe's reliance on food crop imports, including maize, rice, and wheat, is driven by several factors: climate variability, production challenges, population growth, and economic constraints. These imports expose structural weaknesses in local food systems while straining foreign currency reserves. The trade-offs between prioritising tobacco and ensuring food security are particularly evident, with tobacco's economic benefits overshadowing its displacement of staple crops.

Despite these challenges, the analysis identifies promising opportunities for diversification. Alternative crops, such as industrial hemp, horticultural produce (e.g., blueberries and citrus), and small grains like millet and sorghum, offer viable options to reduce tobacco dependency. These crops align well with Zimbabwe's climatic and agro-ecological conditions and respond to growing regional and international demand. Realising their potential, however, will require strengthened and robust value chains, improved market infrastructure, and supportive frameworks.

This report provides recommendations to begin to explore how to address these issues. A key strategy involves implementing

targeted policies and trade mechanisms that promote alternative crops. Subsidies, tax incentives, and guaranteed pricing mechanisms can encourage farmers to diversify into crops beyond tobacco, while investments in value addition and processing facilities will enhance the competitiveness of alternative crops in global markets. Leveraging regional trade agreements, such as the African Continental Free Trade Area (AfCFTA), and fostering climate-smart agricultural practices will further ensure Zimbabwe's agricultural sustainability and resilience. Additionally, redirecting a portion of tobacco export earnings toward funding diversification initiatives, such as capacity-building and market development, will align resources with broader diversification goals. While this may not be the era when tobacco supply is eliminated, it can be the era of rigorous experimentation and learning to support the supply chains and consumer markets for core food crops, widen the range of opportunities in rural communities, and learn how to support sustainable, healthy, fair and prosperous local economies.

Improving institutional coordination and addressing market barriers requires exploration and action. Establishing centralised mechanisms for inter-ministerial collaboration, strengthening agricultural extension services, and bolstering research institutions may serve as critical steps to enhance capacity and efficiency. Developing rural infrastructure, simplifying export processes for smallholder farmers, and leveraging digital platforms for market connectivity will address key barriers that currently limit access to diversified markets. Engaging community-based organisations and fostering participatory approaches can further ensure that diversification strategies are inclusive and aligned with local needs.

In conclusion, transitioning Zimbabwe's agricultural sector from its heavy reliance on tobacco towards a more diverse and sustainable model requires an integrated strategy. By balancing economic resilience, food security, and environmental sustainability, Zimbabwe has the opportunity to empower rural communities, stabilise food systems, and unlock new trade opportunities. This strategic alignment positions the country to thrive amid global changes, reinforcing its commitment to inclusive and sustainable agricultural growth.

01

Introduction and Background

Agriculture plays a pivotal role in Zimbabwe's economic framework, contributing significantly to economic stability, livelihoods, food security and growth. Earlier estimates placed the sector's contribution to GDP at approximately 18-20% (World Bank, 2025; FAO, 2021). However, the most recent national accounts data indicate that agriculture accounted for 11.1% of GDP in 2025, up from 9.4% in 2024, while agricultural value added grew by 27.9% in 2025 (ZIMSTAT, 2026). More than 60% of Zimbabwe's rural population relies on agriculture for their livelihood, highlighting its importance in providing employment and income (World Bank, 2025; IFAD, 2025). The agricultural sector is also a major source of export revenue, historically accounting for around 40% of Zimbabwe's total export earnings (FAO, 2021; Abel et al., 2023). More recently, however, the country's exports have become increasingly dominated by minerals, which accounted for 82% of total exports between January and June 2026, largely driven by increased gold exports (RBZ, 2026).

Key agricultural crops grown in the country include tobacco, maize, cotton, and horticultural products (FAO, 2021; Abel et al., 2023). Tobacco, in particular, is one of the most significant contributors to export revenue, with Zimbabwe among Africa's largest tobacco producers (Ministry of Finance, 2023; ZimTrade, 2025). While tobacco farming has contributed to macroeconomic growth, it has also created a dependency that poses several challenges. These include environmental degradation, vulnerability to global market fluctuations, and a lack of diversification that undermines food security and sustainable development (Moss, 2024; Ndoro-Mkombachoto, 2024).

Importantly, the economic benefits to smallholder farmers are also limited, suggesting that the micro- and macro-economics of tobacco production do not align. At the same time, Zimbabwe imports substantial amounts of food crops, raising concerns about the trade-offs between

prioritising tobacco exports and ensuring domestic food self-sufficiency (Shambare, 2025; Muronzi, 2025).

Table 1: Agricultural Production, 2016-2019
(‘000 tonnes)

	2016/17	2017/18	2018/19
Tobacco	188.9	194.3	..
Maize	2,155.5	1,708.7	776.6
Sugarcane	4,350.0	3,903.0	..
Cotton	127.0	130.3	133.0
Groundnuts	139.5	127.2	321.7
Wheat	158.5	136.0	..
Sorghum	182.0	154.2	77.5
Soybeans	35.7	59.8	..
Barley	15.0	33.4	..
Sunflower seeds	10.4	3.8	11.0
Tea	19.0	20.0	..
Horticulture	70.0	71.0	77.0
Dairy (million l)	65.4	66.4	75.4
Poultry	134.5	166.0	..
Beef	72.0	74.5	..
Pork	10.0	11.4	..

Source: WTO, 2020

Efforts to transition toward alternative crops and diversified farming systems are hindered by multiple factors, such as climate change, inadequate infrastructure, policy implementation gaps, and socio-economic dependencies on tobacco farming (FANRPAN, 2025; IFAD, 2025; Ndoro-Mkombachoto, 2024). Structural Adjustment Programmes (SAPs), implemented in Zimbabwe in the early 1990s under World Bank and IMF guidance, focused on market liberalisation, removal of agricultural subsidies, and reduction of government expenditure, which increased input costs for farmers and reduced access to essential services such as extension support and affordable credit (Marabuka, 2017; Shoko, 2016). These reforms, including the withdrawal of subsidy support, contributed to a decline in smallholder use of purchased inputs and undermined production capacity, particularly among resource-poor farmers who could not absorb higher costs (Shoko, 2016; Agriculture Subsector Review, 2005). As a result, agricultural productivity stagnated or fell in some areas, reducing rural incomes and limiting the ability of

farmers to invest in diversifying into alternative or higher-value crops. The weakening of institutional support systems, coupled with broader economic contraction and rising poverty associated with SAP implementation, has constrained current efforts to transition toward diversified farming systems that require capital, access to markets, and reliable services (Marabuka, 2017; Shoko, 2016). This legacy persists today, as many smallholders remain locked into low-value, subsistence production with limited choice to improve resilience and livelihoods. Yet, national and subnational policies, trade frameworks, and emerging markets seek to support greater opportunity for transition to higher revenue-earning crops and activities.

This paper examines possibilities for transition toward alternative crops and diversified farming systems by exploring the interplay between agriculture and trade. Through this lens, it aims to provide insights for rethinking Zimbabwe's agricultural and trade strategies to achieve diversification for the country's development.

1.2. Purpose and objective of the paper

The purpose of this report is to critically examine Zimbabwe's policy and trade dynamics with a focus on agriculture and industrialisation. It seeks to explore the challenges and opportunities involved in transitioning from tobacco farming to the development of alternative crops, addressing the broader implications for sustainable livelihoods and economic growth. Through a trade and industrialisation lens, the study aims to analyse how national and subnational policies, institutional mechanisms, and market dynamics either support or hinder efforts to diversify agriculture. Furthermore, it assesses the economic trade-offs associated with prioritising tobacco as an export commodity versus food crop trade, offering insights to inform future policy interventions. A description of the methods utilised is shown in *Appendix 1*.

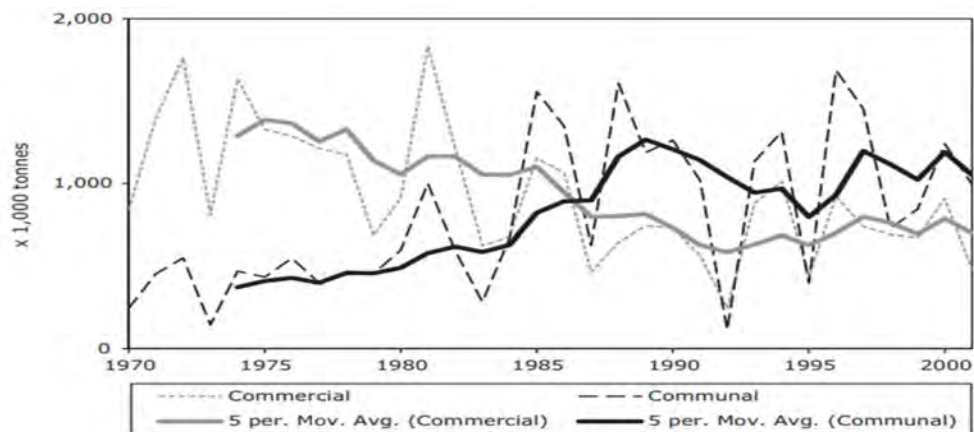
02

Overview of Zimbabwe's agricultural sector

Zimbabwe's agricultural sector stands as the lifeblood of the nation's economy, sustaining the livelihoods of approximately 60% of the population and contributing significantly to the country's GDP and food security (World Bank, 2025; IFAD, 2025). The sector operates on over 33.3 million hectares of land, with its structure reflecting a dual farming system that combines commercial and smallholder farming. Together, these two systems shape the agricultural landscape, driving production, trade, and rural development (International Trade Administration, 2024).

Historically, commercial farming has been the dominant force in the sector, focused on large-scale production of cash crops such as tobacco, cotton, horticultural products, and wheat. Leveraging irrigation systems, advanced technology, and favourable market access, commercial farmers contribute significantly to the country's exports and economic earnings. *Figure 1* below shows maize output by commercial vs communal/smallholder farmers from pre-independence to 2000, when land reform commenced; *Table 2* shows the number of farmers. On the other hand, smallholder farming, anchored in communal areas and resettlement schemes, forms the backbone of rural livelihoods, with subsistence crops like maize, sorghum, millet, and groundnuts being the main focus. Livestock production, particularly cattle, goats, and poultry, complements crop farming, providing diversification and additional income sources for rural households (IH Securities, 2023).

Figure 1: Maize production ($\times 1,000$ tonnes) of commercial vs smallholder farmers 1970-2000
commercial farmers = grey-dotted line
smallholder farmers = black dotted line.
five-year moving averages also included 1970–2000



Source: Nyandoro and Andersson, 2025.

Table 2: Number of smallholder and commercial farmers in Zimbabwe

Period	Farmers (smallholder and commercial) estimates
1960–1980 (Colonial era)	Smallholder: approx. 6 million black smallholder farmers on Tribal Trust/communal lands by 1979 (avg plot sizes approx. 2–3 ha) Commercial: approx. 4,600–6,000 large-scale predominantly white commercial farmers controlling approx. 40–46% of arable land (approx. 14.8 million ha) by 1979
1981–2000 (Post-Independence, before “fast track” land reform)	Smallholder: Rapid growth in smallholder agriculture; by the mid-1980s, smallholder maize production more than tripled and smallholders accounted for approx. 50%+ of maize deliveries by 1986 (implies millions engaged in crop farming). Commercial: Large-scale commercial farm count declined from approx. 6,000 in 1980 to approx. 4,000 by 1990 but remained a key producer
2001–2025 (Post-land reform)	Smallholder and Resettled: After fast-track land reform from 2000, land was redistributed to an estimated 300,000+ black families; small-scale commercial farms numbered approx. 9,655 as of 2017 surveys. Commercial: Former white large farms dropped sharply (only a few hundred (some reports say about 300) by the mid-2000s), some later returning as joint venture holders.

Sources: Deininger & Binswanger, 1995; Charuma, 2000; FAO, 2009; World Bank, 2017

Among the crops produced, tobacco dominates the agricultural scene, not only as the leading export commodity but also as a major source of foreign exchange. In 2022, Zimbabwe produced over 260,000 tons of tobacco, earning its position as Africa's largest tobacco producer. However, this reliance comes at a cost, as tobacco farming contributes to environmental degradation through deforestation, soil erosion, and unsustainable farming practices. Despite these challenges, established market infrastructure makes it difficult for farmers to transition to alternative crops (Zimbabwe Tobacco Association, 2023). Zimbabwe's tobacco sector is largely seen by policy and industry stakeholders as lucrative with well-developed market infrastructure; however, a study on contract arrangements

in Manicaland found that smallholder growers do not consistently realise net financial gains from tobacco production as they frequently incur high input costs and sell under asymmetrical pricing conditions that can contribute to tobacco-related indebtedness. Importantly, indebtedness and profitability are distinct measures, but the study provides evidence of financial pressures among smallholder growers. Overall, 57% of farmers surveyed reported tobacco-related debt, with indebtedness more prevalent among contract than independent farmers. The study also found that most farmers were dissatisfied with the profits from tobacco production, with tobacco-related debt considerably more common among those who were not or only sometimes satisfied with their profits than

among those who were always satisfied (Chingosho et al., 2021). This suggests the need for more rigorous studies on tobacco



A communal farm in Zimbabwe © TARSC, 2022

Maize remains Zimbabwe's staple crop, grown by the majority of smallholder farmers. However, reliance on rain-fed farming systems, coupled with frequent droughts and climate variability, often results in low yields,

profitability in smallholder farming settings to gain an accurate picture of the economic reality of smallholder tobacco growers.

driving the need for imports during food-insecure periods. Wheat production, although historically constrained, has shown promising growth, with the 2022/23 season yielding a record 375,000 tons. Similarly, soybean production holds strategic importance for cooking oil and animal feed, yet local supply covers only 30% of demand, necessitating imports to fill the gap (GoZ, 2023). The disproportionate rate of importation for key food crops illustrates that many of the staple food needs are not met by domestic production. *Table 3* shows import and export quantities in tonnes for maize, wheat and soyabeans from 2005 to 2024 using data from Trademap.

Table 3: Zimbabwe maize, soyabeans and wheat imports and exports: 2005 to 2024

Year	Maize or corn (code 1005)		Soyabeans (code 1201)		Wheat and Meslin (code 1001)	
	Imports (tonnes)	Exports (tonnes)	Imports (tonnes)	Exports (tonnes)	Imports (tonnes)	Exports (tonnes)
2005	500,923	68	6,289	2	31,607	623
2006	342,008	1,545	1,246	0*	17,252	0*
2007	519,045	2	2,596	1	35,286	200
2008	357,085	7	8	870	10,619	0*
2009	821,284	64	35	2	151,772	0*
2010	173,720	103	20,818	0*	160,078	0*
2011	460,000*	1,369	3,258	0*	196,437	61
2012	432,943	2,450	460	100	184,810	1,113
2013	303,450	1,057	5,000*	344	110,000*	110
2014	287,432	332	17,376	841	201,010	1
2015	571,775	440	14,239	89	231,293	1,510
2016	821,673	692	8,451	27	280,000*	0*
2017	308,267	2,324	67,197	377	205,760	16,500
2018	92,857	846	17,631	176	273,788	7
2019	73,601	1,154	12,630	42	124,632	300
2020	894,952	4,484	19,011	240	244,249	2,083
2021	352,482	2,330	48,320	118	180,726	0*
2022	119,020	4,620	29,889	2,441	172,774	11
2023	379,728	2,567	24,481	56	258,405	124
2024	1,697,033	11,557	114,766	22	311,800	64

Source: All figures are from Trademap (trademap.org), except those in *

Cells marked * had missing values in the TRADEMAP dataset. We filled them using FAOSTAT, UN COMTRADE and WITS databases (aggregate trade data. These estimates should be interpreted as indicative rather than exact HS-code trade quantities.

Livestock farming plays a critical role in Zimbabwe's agricultural systems, offering

rural households a means of risk management and income diversification.

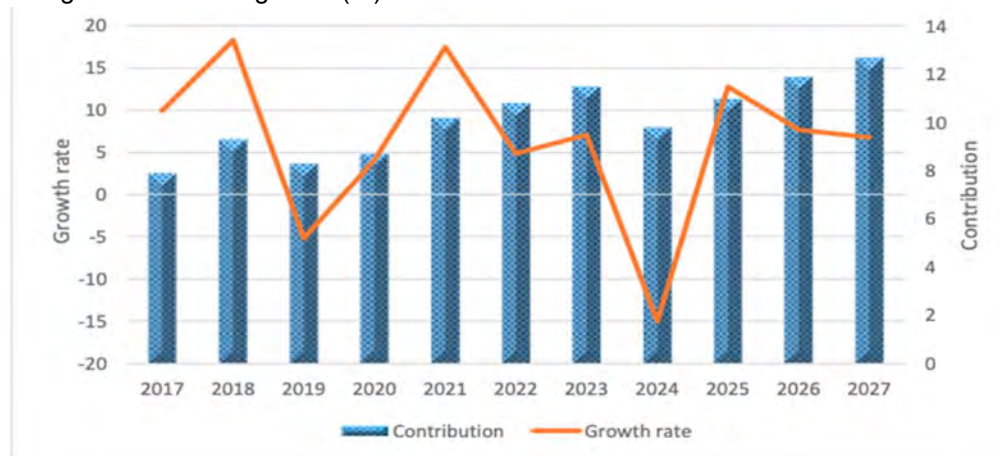
Cattle farming contributes to the beef industry and household income, while poultry and goat farming offer quick returns for small-scale farmers. Despite growing livestock numbers, milk production remains below national demand, presenting an opportunity for enhanced investment and improved farming practices.

The agricultural sector faces a number of systemic challenges that hinder its growth and resilience. Climate vulnerabilities, including droughts and erratic rainfall patterns, heavily impact rain-fed crop production and reduce agricultural productivity. Infrastructure gaps, particularly limited irrigation facilities, poor road networks, and inadequate storage, further

exacerbate the sector's challenges, restricting farmers' access to markets and increasing post-harvest losses. Economic constraints, such as high input costs and limited access to credit, prevent farmers from adopting advanced farming techniques and diversified cropping systems. Additionally, the entrenched dependency on tobacco farming perpetuates monocropping practices and slows the uptake of alternative livelihoods.

Figure 2 below reflects the growth forecasts for the agriculture sector for the years 2025, 2026, and 2027.

Figure 2: Agriculture sector growth (%)

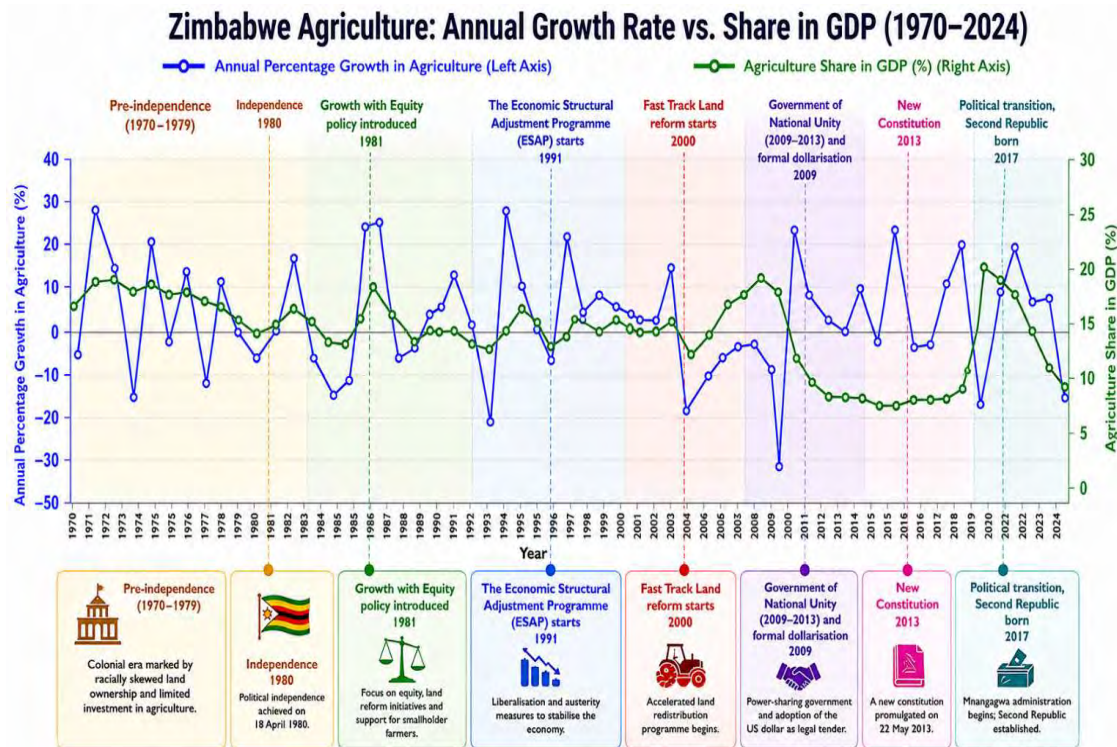


Growth rate (x-axis): Is the growth rate of the agriculture sector, i.e whether agricultural output (crops, livestock, etc.) grew or shrunk compared to the previous year, expressed as a percentage. Thus, the agriculture sector was projected contract by 15% in 2024 before recovering and growing by 12.8% in 2025 (estimate)

Contribution (y axis): It shows the percentage contribution of the agriculture sector to the national GDP growth. For example, if in 2022 the national GDP grew by 6%, agriculture contributed about 12% of that 6%, i.e 0.72 percentage points of the 6%.

Source: Ministry of Finance, Economic Development and Investment Promotion, 2024

Figure 3: Agriculture sector growth (%) vs Agriculture share in GDP (%) 1970-2024



Source: Authors using data from Trading Economics, World Bank and Index Mundi

Despite these hurdles, Zimbabwe's agricultural sector presents significant opportunities for transformation. The promotion of drought-resistant crops such as small grains like sorghum, millet, and legumes (groundnuts, sugar beans and soybeans) holds promise for semi-arid regions, where rainfall is erratic, and water scarcity is common. The adoption of modern farming technologies such as precision agriculture, solar-powered irrigation systems, and mechanisation offers innovative solutions to enhance productivity and climate resilience. Despite mechanisation holding considerable promise for enhancing productivity, improving timelines of operations, labour efficiencies and potential yields in Zimbabwe and elsewhere in sub-Saharan Africa (FAO & African Union Commission, 2019; Sims & Kienzle, 2017), there are also significant economic, institutional and environmental cautions: high upfront capital costs and limited access to credit, spare parts and maintenance services can make modern machinery unaffordable and unsustainable for smallholders (Daum & Birner, 2017; Ngoma et al., 2024). Poorly designed mechanisation programmes such as those

focusing on large machinery such as tractors have failed in the past when they ignored farmers' specific plot sizes, service support and infrastructure constraints (Daum & Birner, 2017; Ngoma et al., 2024). Environmental concerns are also prominent, as conventional mechanised tillage and monocultural practices contribute to soil compaction, erosion, biodiversity loss and dependency on fossil fuels and agrochemicals, which can undermine long-term soil health and ecosystem functioning (Socio.Health, 2025; FAO & African Union Commission, 2019). Sustainable mechanisation strategies for Zimbabwe should therefore emphasise appropriate-scale technologies, service-delivery models such as custom hiring, and integration with conservation agriculture to mitigate environmental harms and ensure that mechanisation is both economically viable and ecologically compatible with smallholder contexts (Daum & Birner, 2017; Sims & Kienzle, 2017; Ngoma et al., 2024). In recent years, the challenge has been the high cost of adopting technology-based agriculture and the systems that are required to maintain technology use, with the majority of small-scale farmers lacking finance and credit facilities to acquire it.

Private sector involvement has gained momentum, with several companies now involved in the sector either directly engaging in production or indirectly contracting farmers, supporting them with inputs (seed, fertilisers and chemicals). Whilst such initiatives are significantly transforming the sector, there is a need for improved transparency, particularly in the funding initiatives, to create new opportunities for farmers. Export potential is also expanding, as Zimbabwe resumes grain exports and explores industrial hemp production as an alternative crop. Inclusive programmes targeting youth and women in agriculture are fostering innovation, contributing to diversification, and encouraging participation in the sector's growth.

Thus, the country's agricultural sector stands at a pivotal moment in its history. With the right balance of investment, policy reform, and innovation, it has the potential to overcome its challenges and drive sustainable development. By addressing the structural limitations while capitalising on

emerging opportunities, Zimbabwe can reposition agriculture as a dynamic and inclusive pillar of national progress.

2.1. Food Crop Production

Zimbabwe's food crop production is heavily influenced by climatic conditions and resource availability. The country has faced challenges such as droughts and erratic rainfall, which have significantly impacted cereal production. For example, the 2024 cereal harvest was estimated at 1.3 million tonnes, nearly 40% below the five-year average due to severe drought conditions (FAO, 2024). Maize, the staple crop, was particularly affected, with production dropping to 635,000 tonnes, over 60% below average. However, wheat production has shown resilience, with an above-average output of 540,000 tonnes in 2024, largely due to favourable conditions during the winter cropping period (FAO, 2024).

Table 4: Crop production in Zimbabwe 2015/16-2025/2026

Year	Maize (1000 Tons)	Millet (1000 Tons)	Sorghum (1000 Tons)	Wheat (1000 Tons)	Barley (1000 Tons)	Cotton (1000 480- lb Bales)	Soybean (1000 Tons)	Peanut (1000 Tons)
2015/16	742	18	35	62	55	53	42	52
2016/17	512	27	36	62	55	137	48	47
2017/18	2156	107	182	158	56	270	36	98
2018/19	1701	58	78	170	55	200	60	103
2019/20	774	35	41	95	55	185	60	54
2020/21	1202	49	104	213	55	245	60	77
2021/22	1470	104	244	230	55	215	54	88
2022/23	1453	49	145	175	55	215	71	104
2023/24	1500	90	191	240	55	215	69	161
2024/25	635	25	82	245	55	215	60	100
2025/26	1300	65	180	250	55	225	60	100

Source: USDA Foreign Agricultural Service (FAS), PSD Online, accessed August 12, 2025.

The shortfall in domestic production has driven up the need for food imports. For the 2024/25 marketing year, Zimbabwe's cereal import requirements were estimated at 1.3 million tonnes, more than double the five-year average. Key imports include maize, wheat, and rice, sourced primarily from regional partners like South Africa, Zambia, and Mozambique. These imports are critical for addressing food security gaps but also highlight the country's dependency on external sources for staple foods.

Table 5: Comparative analysis of food import expenditures and tobacco export revenues in Zimbabwe

Year	Tobacco Export Value (1000 USD)	Total Food Import Value (1000 USD)	Net Difference (Exports - Imports)	Export-to-Import Ratio
2003	464621	261757.0	202864.0	1.78
2004	396123	404506.0	-8383.0	0.98
2005	188540	231384.0	-42844.0	0.81
2006	253438	969945.0	-716507.0	0.26
2007	244738	499381.0	-254643.0	0.49
2008	242174	698049.0	-455875.0	0.35
2009	241775	1213689.0	-971914.0	0.20
2010	420000	1428260.0	-1008260.0	0.29
2011	663596	1567303.0	-903707.0	0.42
2012	777861	1648469.63	-870608.63	0.47
2013	869882	1178999.0	-309117.0	0.74
2014	807602	1009564.18	-201962.18	0.80
2015	864954	1161902.54	-296948.54	0.74
2016	887042	1210083.86	-323041.86	0.73
2017	800525	893849.58	-93324.58	0.90
2018	864700	876304.92	-11604.92	0.99
2019	782997	503420.7	279576.3	1.56
2020	741384	1253246.96	-511862.96	0.59
2021	780532	1530252.86	-749720.86	0.51
2022	926083	1722702.37	-796619.37	0.54
2023	1190962	1687756.38	-496794.38	0.71

Source: FAOSTAT (2025). *Crops and Livestock Products Trade Data – Zimbabwe*. Food and Agriculture Organisation of the United Nations

2.2 Trade-Offs: tobacco as a major export commodity

The reliance on tobacco as a major export commodity creates significant trade-offs in Zimbabwe's agricultural economy. While

tobacco generates substantial foreign exchange; it often comes at the expense of food crop production and often contributes only marginally to rural livelihoods. The prioritisation of tobacco farming has led to some farmers, both commercial and small-scale, shifting from traditional food crops to cash crops, thus exacerbating the need for imports. Additionally, the environmental impact of tobacco farming, including deforestation and soil degradation, poses

long-term sustainability challenges (see *Box 1 pp 12*).

On the other hand, the government is making efforts to address these trade-offs by promoting crop diversification and climate-smart agriculture. Initiatives to increase the production of drought-resistant crops like sorghum and millet aim to reduce dependency on imports and enhance food security. However, these efforts require significant investment in infrastructure, technology, and farmer support to be effective.

Table 6: Tobacco exports in 2023

Country	Export Value (2023)	Notes
China	\$622 million	Largest importer, driven by demand for premium Virginia tobacco.
Vietnam	\$53 million	Growing market for Zimbabwean tobacco.
United Arab Emirates	\$51.6 million	Significant buyer in the Middle East.
South Africa	\$50.7 million	Regional partner and importer.
Germany	\$43.8 million	European market with steady demand.

Source: OEC, 2023; The Zimbabwe Advocate, 2024

Zimbabwe processes a fraction of its tobacco locally, focusing on value addition through cut rag and cigarette production. In 2025, approximately 10.1% of available tobacco was processed domestically, amounting to 7.2 million kilograms (Kadzere, 2025). Despite having installed processing capacities for 16 billion cigarette sticks and 30.4 million kilograms of cut rag annually, utilisation remains low, at about 27% and 24%, respectively. Efforts are underway to increase domestic processing through the Tobacco Value Chain Transformation Plan, which aims to maximise the economic benefits of value addition.

Zimbabwe's Tobacco Value Chain Transformation Plan is a bold initiative aimed at harnessing the full economic potential of the tobacco industry while addressing its

associated challenges. As one of the country's largest export commodities, tobacco is seen to play a critical role in the economy. However, the sector has long been marked by limited value addition, environmental concerns, and heavy reliance on external financing (The Herald, 2022). This transformation plan charts a pathway to enhance sustainability, economic resilience, and farmer livelihoods, positioning the sector to become a \$5 billion industry by 2025 (GoZ, 2021).

A key focus of the plan is the localisation of tobacco financing. Historically, Zimbabwe's tobacco farmers have depended on offshore pre-financing arrangements, i.e through the foreign owed/foreign capitalised merchants, which reduce their financial security (TIMB, 2021). These financing mechanisms were structured to provide farmers with essential inputs like seeds, fertilisers, and chemicals, ensuring they could cultivate tobacco successfully. The process operated under contract farming schemes, where tobacco merchants acted as intermediaries between farmers and offshore financiers. Under this system, tobacco merchants would secure loans from international financial institutions. These loans were then used to purchase and distribute agricultural inputs to contracted farmers. In return, farmers committed to selling their entire tobacco harvest exclusively to the merchants who financed them. While this arrangement ensured farmers had access to the resources they needed, it came with significant challenges that hindered the full economic potential of the sector (TIMB, 2021). The dominance of offshore finance has limited domestic value retention, as a significant share of export proceeds is used to service foreign credit lines rather than being reinvested locally, weakening backwards and forward linkages in the national economy (Tobacco Reporter, 2023; ZIMCDD, 2023). Furthermore, reliance on foreign currency-denominated loans has exposed farmers and the sector to exchange-rate risks, as production costs are largely in foreign currency while portions of farmer payments are made in local currency, eroding real earnings (Sandura, 2025). These challenges have in part contributed to limited accumulation at farm level, discouraged diversification, and constrained the broader developmental impact of tobacco despite its strong export performance (Scoones et al., 2018).

The low domestic value retention of these prefinancing arrangements is in part due to their cost structure. Farmers often found themselves burdened by inflated input prices due to administrative fees, interest rates, and markups applied by the merchants. This left many farmers with reduced earnings at the end of the season. Additionally, the repayment process directed a significant portion of Zimbabwe's tobacco export earnings toward settling these offshore loans. It is estimated that only about 12.5% of the total export value returned to the country as net inflows, limiting the economic benefits of tobacco exports for Zimbabwe's broader economy (Chronicle Editor, 2024). This dependency on external financing also perpetuated a cycle of reliance, leaving the country vulnerable to fluctuations in global financial conditions. Farmers, too, found themselves locked into agreements that made it challenging to diversify their crops or explore alternative income sources, further entrenching the country's dependence on tobacco farming (TIMB, 2021). A significant proportion of smallholder tobacco farmers in Zimbabwe are heavily indebted, with studies showing that about 57 % of farmers in Manicaland province carry tobacco-related debt, and contract farming arrangements are strongly associated with higher debt levels (Chingosho, Dare, & van Walbeek, 2020; Mongo et al., 2025). Limited access to alternative finance and high input costs often leaves farmers with negative net earnings, creating cycles of dependency and financial vulnerability despite the sector's strong export performance (Business Daily News Zimbabwe, 2025). Research on contract farming in the smallholder tobacco growing sector in Zimbabwe and neighbouring countries finds that farmers end up making very little profit and often experience debt at the end of the growing season (Chingosho et al., 2021; Magati et al., 2019; Makoka et al., 2017).

Thus, the plan aims to address this by mobilising domestic funding, with a target of localising 70% of tobacco production costs by 2025 (GoZ, 2021). This move is envisaged to strengthen the financial independence of farmers and ensure greater retention of profits within the country.

In line with national economic priorities, the plan also seeks to significantly increase domestic tobacco processing and value addition. Currently, only 2% of Zimbabwe's

raw tobacco undergoes local processing into products such as cigarettes. The transformation plan sets an ambitious goal of raising this figure to 30% by 2025, with the aim of creating jobs, boosting exports of finished products, and ensuring the country retains more value from its agricultural exports (TIMB, 2021; The Herald, 2022).

Recognising the environmental and economic risks of overreliance on tobacco, the plan also emphasises diversification into alternative crops. By encouraging the cultivation of crops such as industrial hemp, chia, and sesame, the plan aims to ensure more sustainable farming practices while broadening farmers' income streams. By 2025, these alternative crops are expected to contribute 25% to farmers' overall earnings. Reducing over-reliance on tobacco and improving resilience (Agriculture.co.zw, 2025) and this was a strategic goal for the TIMB in 2021-2025. However, progress has been partial; as of the 2024/25 marketing season, the share of income derived from alternative crops was estimated at approximately 15 % (ZTA, 2025). Diversification efforts include pilot projects supporting cultivation of maize, sugar beans, sweet potatoes, and other crops alongside tobacco, as well as initiatives to improve standards for export-oriented production through certification schemes such as GLOBALG.A.P. (Tobacco Reporter, 2024; TIMB, 2025). Thus, research and innovation are key components of the transformation plan. While there has been some emphasis on diversification, tobacco remains embedded in parallel plans like those of the Tobacco Research Board (TRB), which is actively exploring high-value compounds derived from tobacco, such as nicotine, solanesol, and edible oils, and seeks to diversify the sector's product offerings while continuing reliance on tobacco leaf growing. Additionally, the board is investigating new tobacco varieties, such as shisha tobacco, to expand market opportunities (GoZ, 2021). Often these strategies are employed by tobacco companies to deflect from the poor conditions associated with tobacco farming, enhance public perception of their activities, and maintain positive relations with key government regulatory agencies.

Box 1: Tobacco farming, the environment and climate vulnerability

Tobacco farming, while economically important for many communities, comes with a high environmental cost, particularly in the context of climate change. The cultivation and production of tobacco have far-reaching effects that degrade ecosystems, contribute to greenhouse gas emissions, and exacerbate the global climate crisis.

One of the most alarming environmental impacts of tobacco farming is deforestation. Large expanses of forests are cleared to make way for tobacco plantations, particularly in regions where land is scarce or where farmers are expanding their operations. Beyond land clearance, the curing process of tobacco, where leaves are dried, relies heavily on wood as fuel. This process depletes forest resources at an unsustainable rate, leaving behind barren landscapes and disrupting ecosystems. Deforestation not only accelerates climate change by reducing the earth's ability to absorb carbon dioxide but also diminishes biodiversity, which is crucial for maintaining ecological balance.

The strain on soil health is another overlooked consequence of tobacco farming. Tobacco is a nutrient-demanding crop, stripping the soil of vital minerals and leaving it exhausted. Farmers, often driven by economic pressures, continue to cultivate tobacco on the same land, leading to significant soil degradation over time. Degraded soils lose their ability to retain water and support other crops, making them less resilient to the impacts of climate change, such as erratic rainfall and prolonged droughts.

Chemical use in tobacco farming compounds the problem. Pesticides, herbicides, and fertilisers are used extensively to maintain high yields, but their runoff pollutes water bodies, contaminating rivers and groundwater sources. This not only harms aquatic ecosystems but also reduces the availability of clean water for local communities. The environmental toll is further magnified by the energy-intensive processes involved in tobacco production, which generate greenhouse gases and exacerbate global warming.

Additionally, tobacco farming contributes directly to air pollution. The curing of tobacco leaves emits significant amounts of carbon dioxide and other greenhouse gases, adding to the already immense carbon footprint of the industry. The cumulative impact of these emissions accelerates global temperature rise, contributing to more extreme weather patterns that threaten agricultural productivity worldwide.

From a biodiversity perspective, the monocropping of tobacco eliminates the variety of plants that would otherwise support local ecosystems. Habitats for many species are destroyed, reducing populations of insects, birds, and other wildlife that play vital roles in pollination and pest control. The long-term loss of biodiversity weakens ecosystems, making them less adaptable to the shocks of climate change.

Tobacco farming thus presents a double-edged sword. While it provides economic benefits to farmers and national economies, its environmental impact poses significant threats to climate resilience and sustainability. Transitioning away from tobacco farming toward diversified and environmentally friendly agricultural systems is not only an economic imperative but also a moral one in the face of a worsening climate crisis. Policies and initiatives that support farmers in adopting alternative crops, protect natural resources, and promote climate-smart agriculture are essential to mitigating the environmental degradation caused by tobacco farming. This shift is not just about protecting the planet; it's about ensuring sustainable livelihoods for future generations. Climate change is an urgent challenge, and addressing the environmental impacts of tobacco farming is a critical step toward a more sustainable and resilient world.

03

Policy landscape for alternative crops

The Ministry of Lands, Agriculture, Water, Fisheries & Rural Resettlement plays a central role in shaping agricultural policies in Zimbabwe. This includes managing various parastatals, such as Agribank (Agricultural Bank of Zimbabwe), the Agricultural and Rural Development Authority, the Agricultural Marketing Authority, the Cold Storage Commission, the Grain Marketing Board (GMB), the Pig Industry Board of Zimbabwe, the Tobacco Industry and Marketing Board, and the Tobacco Research Board (GoZ, 2020; WTO, 2020).

In terms of policy enforcement, the Agriculture Marketing Authority (AMA) serves as the primary regulator for the production, marketing, and processing of agricultural commodities. Its mandate includes ensuring equitable pricing mechanisms, fostering contract farming for critical crops, and advising the Minister of Agriculture on pricing, guarantees, subsidies, and levies. AMA also facilitates agreements between private firms and farmers for contract farming. Furthermore, AMA raises funds, notably through treasury bills (with the last issuance of USD 80 million in 2018), to finance crop production and procurement via the GMB. However, challenges remain regarding this system (WTO, 2020).

Contract farming is a cornerstone of Zimbabwe's agricultural policy, implemented through private sector initiatives or state-backed programmes such as Command Agriculture. This model applies to different commodities, including dairy, cotton, tobacco, maize, soya beans, and wheat. AMA regulations stipulate that contractors must provide a basic input package to farmers, determined by the Grain and Oilseeds Technical Committee. Additionally, agreements between contractors and farmers should incorporate pricing frameworks that account for input costs and associated services.

Command Agriculture Command Agriculture is a government-led programme launched in the 2016/17 agricultural season, aimed at improving food security and reducing dependence on grain imports. The programme operates as a contract farming arrangement under which farmers receive inputs, including seeds, fertilisers, and fuel, and commit to delivering specified crops such as maize, soybeans, and wheat to Grain Marketing Board (GMB) depots at guaranteed producer prices. Statutory Instrument 79 of 2017 established the scheme's legal framework under the Agricultural Marketing Authority Act. From the 2019/20 season, input financing was transferred to the banking system under the National Enhanced Agriculture Productivity Scheme (NEAPS). Under this model, commercial banks, principally CBZ and AFC, provided loans to farmers, backed by government performance guarantees. The government has since reduced its direct financing role, with private financial institutions taking on greater responsibility for farmer financing, while the government has focused on de-risking mechanisms and guarantees for strategic crops.

Cotton production in Zimbabwe is predominantly governed by contract farming arrangements between growers and private ginners or the Cotton Company of Zimbabwe (Cottco). Government policies, such as Statutory Instrument 142 of 2009, regulate the cotton value chain from cultivation to marketing. These regulations aim to curtail side-marketing, which has previously hindered loan recovery rates for contractors, leading to reduced investment in the sector (GoZ, 2020).

The private sector significantly contributes to agricultural financing, primarily through contract farming schemes. Alongside private entities, Agribank offers both agricultural and general financial services, including loans and deposit facilities. Its operations are overseen by the Reserve Bank of Zimbabwe (RBZ). In the 2019 (Supplementary) Budget,

ZWL 35 million was allocated for Agribank's recapitalisation (WTO, 2020).

resilient to climatic challenges as well as responding to global trends.

Zimbabwe's agricultural landscape is at a stage where the interplay between national and subnational policies is pivotal to achieving sustainable development and food security. With a historical reliance on staple crops such as maize and cash crops like tobacco, calls have been made to shift toward diversified agricultural systems and practices that incorporate alternative crops

Table 7 below gives an overview of the policies in place that support diversification and alternative crop production in Zimbabwe. The list is not exhaustive of all the policies available. However, it provides an indication of what is available, the specific areas of focus, as well as gaps identified. A more detailed analysis of the NAPF is then given, assessing all the pillars it covers.

Table 7: Overview of Policies Influencing Alternative Crop Development in Zimbabwe

Policy Name	Coverage	Gaps
National Agriculture Policy Framework (NAPF) 2019-2030	Focuses on sustainable agricultural intensification, diversification, and resilience to climate change. Promotes drought-resistant crops, agro-processing, and food security.	Limited funding and implementation capacity for smallholder farmers.
Livelihoods and Food Security Programme (LFSP)	Aims to improve food security and promote alternative crops through climate-smart agriculture practices. Focuses on capacity building and technical support for farmers.	Insufficient scalability and coverage in drought-prone areas.
Command Agriculture Programme	Primarily supports staple crop production (e.g., maize) through input provision and infrastructure development. Can be adapted for alternative crops.	Lack of specific focus on alternative crop production and market creation.
Bioeconomy Strategy	Promotes indigenous plants and alternative crops like chia and sesame for sustainable agricultural production and value addition.	Policy still in development and lacks clear implementation frameworks and targets.
Provincial Agricultural Development Plans	Tailored to agro-ecological conditions of each province, prioritising region-specific crops like sorghum and millet. Includes support for infrastructure and inputs.	Inconsistent coordination and resource allocation across provinces.
Community-Based Initiatives	Supports farmers through local government and NGO collaborations, offering training, inputs, and market linkages for alternative crops.	Limited reach in marginalised and remote communities.
District-Level Climate Adaptation Programmes	Promotes crops that require less water and are tolerant to extreme weather conditions. Focuses on building resilience against climate change.	Lack of integration with national policies and limited financial resources for scale-up.
Pfumvudza Programme	Focuses on conservation agriculture principles, including minimal soil disturbance, mulching, and crop rotation. Provides input support and training to smallholder farmers to enhance food security and climate resilience.	Labour-intensive for farmers, limited adoption in some areas, and gaps in extension services
Vulnerable Households Input Support Scheme:	This ongoing food security programme is designed to replace food assistance with more sustainable ways, supporting vulnerable households and allowing them to escape the poverty trap.	Inconsistent coordination and resource allocation

Source: Author's compilation

3.1. Assessment of the National Agriculture Policy Framework (NAPF)

Zimbabwe's efforts to diversify crops and reduce reliance on tobacco are guided by a comprehensive policy framework, particularly the National Agriculture Policy Framework (NAPF) 2019–2030. This framework envisions an agricultural sector that ensures sustainability, resilience, and economic growth, with crop diversification highlighted as a critical strategy for achieving these goals.

The NAPF underscores the importance of food and nutrition security, market-oriented agriculture, and climate-smart practices, all of which support transitioning from tobacco dependency to more sustainable and diverse agricultural systems. For example, the framework advocates for smallholder farmer empowerment through access to finance, training, and infrastructure, which are essential elements for shifting farmers toward alternative livelihoods. There are examples/pilots from government, civil society organisations (CSOs) and private sector initiatives on this. For example, the Zimbabwe Agricultural Development Trust (ZADT) has enabled smallholders to engage in contract farming for cereals, pulses, vegetables, and oil crops, supporting over 5,000 farmers in sesame production and hundreds in mung bean and paprika value chains by facilitating finance, inputs, markets, and technical assistance. This initiative enabled farmers to improve yields and invest in assets like tractors and trucks (ZADT, 2025). Similarly, the IFAD-supported FARM P3 pilot is helping about 6,000 smallholder sorghum farmers by linking them to mechanisation services, private sector markets, and financial institutions, reducing post-harvest losses and increasing incomes from drought-resilient crops (IFAD, 2025). Climate-smart programmes such as Pfumvudza/Intwasa have also empowered farmers with training in conservation agriculture and the distribution of inputs, leading to increased productivity and resilience for crops such as maize, sunflower, and legumes (Farmonaut, 2024; NewsDay Zimbabwe, 2025). These programmes demonstrate how targeted empowerment that combines finance, technical knowledge, and infrastructure can support farmers to diversify their production, strengthen food

security, and build alternative livelihoods beyond tobacco.

By promoting climate-smart agriculture, the NAPF also addresses the environmental challenges tied to tobacco farming, such as deforestation and land degradation. In line with global sustainability goals, the policy pushes for diversified, environmentally friendly crop production systems, which complement efforts to mitigate the health and environmental impacts of tobacco.

Additionally, the NAPF's vision integrates with Zimbabwe's broader economic strategy under Vision 2030, which aims to modernise agriculture and strengthen trade. This creates opportunities to explore the interplay between trade policies and agriculture in shaping pathways for tobacco control, particularly in identifying viable markets for alternative crops.

Agriculture has long served as a cornerstone of Zimbabwe's economy, underpinning food security, employment, and broader economic development. The NAPF represents a strategic effort to revitalise Zimbabwe's agricultural sector, steering it toward sustainability, resilience, and economic growth. At its core, the framework seeks to transform agriculture into a dynamic driver of national development, addressing structural challenges while creating opportunities for diversification and innovation. The framework is structured around key pillars and targets that collectively seek to strengthen productivity, enhance farmer livelihoods, and ensure that agricultural growth contributes meaningfully to Zimbabwe's broader socio-economic objectives. Below are the key targets covered by the framework.

Crop diversification and sustainable agriculture

One of the central themes of the NAPF is the promotion of crop diversification as a strategy to achieve food security, economic resilience, and environmental sustainability. By encouraging farmers to grow a variety of crops, the framework aims to reduce Zimbabwe's heavy reliance on tobacco, which dominates the agricultural landscape. Diversification efforts are particularly vital in mitigating the vulnerabilities of monocropping, including the risks posed by fluctuating global tobacco prices and climate change impacts.

The NAPF also integrates climate-smart agricultural practices into its vision,

emphasising the importance of cultivating climate-resilient crops tailored to specific agro-ecological zones. This focus aligns with the need to transition from tobacco to alternative crops that are both economically and environmentally viable.

Empowerment of smallholder farmers

Another key target of the NAPF is support for smallholder farmers, who form the backbone of Zimbabwe's agricultural sector. The framework recognises that empowering these farmers is essential to achieving diversification goals. Measures such as improved access to finance, training, and infrastructure are outlined to equip farmers with the tools they need to transition to alternative crops. This support extends to capacity-building initiatives that promote knowledge sharing and the adoption of innovative farming techniques.

Agricultural marketing and trade development

The framework acknowledges the critical role of markets in driving agricultural transformation. It seeks to create market-friendly policies that enable farmers to access domestic, regional, and international markets. For tobacco control efforts, this translates into identifying viable market pathways for alternative crops, ensuring that farmers can sustain their livelihoods while reducing reliance on tobacco production.

Trade policies embedded within the NAPF also complement this vision by fostering competitiveness in agricultural exports. The alignment of trade dynamics with agricultural diversification is a key area where the framework can have a transformative impact on tobacco-dependent economies.

Addressing socio-economic dependencies

The NAPF explicitly recognises the socio-economic challenges associated with transitioning away from tobacco. By providing targeted support for diversification, it aims to reduce economic dependencies while fostering sustainable livelihoods for communities engaged in tobacco farming. This is particularly relevant given the significant proportion of smallholder farmers.

reliant on tobacco as their primary source of income.

Alignment with Vision 2030 and global goals

The NAPF aligns closely with Zimbabwe's Vision 2030 strategy, which aims to modernise agriculture as a driver of inclusive and sustainable growth. It also integrates international commitments, such as the Sustainable Development Goals (SDGs), further reinforcing its relevance to global efforts in sustainable agriculture and tobacco control.

3.2 Challenges and opportunities

While the NAPF 2019–2030 envisions a prosperous, sustainable, and resilient agricultural sector, the reality on the ground in the country presents a complex interplay of challenges and opportunities that shape the journey toward achieving these ambitious goals. Crop diversification, one of the framework's critical strategies, faces significant hurdles, but also enjoys potential facilitators that could drive progress if harnessed effectively.

On the challenging side, climate change remains one of the greatest threats to agricultural transformation in Zimbabwe. Recurrent droughts, unpredictable rainfall patterns, and rising temperatures make farming precarious, especially for smallholder farmers who lack the resources to adapt. Compounding this are environmental issues such as deforestation and soil degradation, which further diminish productivity and complicate efforts to introduce new and diverse crops.

Economic constraints add another layer of difficulty. Smallholder farmers often struggle with limited access to financial resources and affordable credit, making it hard to invest in the tools, training, and technologies needed to successfully diversify their crops. High input costs, including seeds, fertilisers, and irrigation equipment, place additional financial strain on already vulnerable farmers. Furthermore, while the NAPF is comprehensive, gaps in implementation and bureaucratic inefficiencies frequently stall its progress, limiting the practical impact on the ground. Market infrastructure remains a critical bottleneck. Poor road networks, insufficient storage facilities, and inadequate market linkages restrict farmers' ability to access reliable and profitable markets for alternative crops (ADB, 2019). As a result, leaf-buying companies hold significant power in the agricultural sector where the economic

pull of tobacco remains strong due to its established systems and predictable returns, perpetuating dependency on a single cash crop. This dependency also manifests as reliance on the parameters of leaf-buying company contracts, with little negotiating power on the side of smallholder farmers. Socio-economic ties to tobacco farming further deepen this dependency, as many rural households rely on it as their primary livelihood and are often resistant to change without substantial support and incentives (COMESA Business Council, 2018).

Despite these hurdles, Zimbabwe also has notable opportunities that can facilitate the achievement of NAPF objectives. Government programmes, supported by donor agencies and international organisations, are fostering climate-smart agricultural practices and promoting crop diversification. Investments in water infrastructure, such as dams and irrigation systems, offer a foundation for sustainable farming, even in the face of challenging environmental conditions.

Emerging markets for drought-resistant crops, such as sorghum, millet, and legumes, present avenues for diversification. Regional and international trade agreements under SADC and COMESA further enhance the potential for farmers to access wider markets. Zimbabwe's production of sorghum and millet has risen substantially in recent years, with 288,344 tonnes of sorghum and over 134,000 tonnes of pearl and finger millet harvested in the 2024/25 season, up strongly from earlier seasons and accounting for a growing share of overall cereal output

(Zimbabwe National Statistics Agency & Ministry of Agriculture, 2025). However, export values for sorghum remain modest; Zimbabwe exported about 1.63 million kg of grain sorghum in 2023, including shipments to Zambia and South Africa, indicating emerging regional trade activity for small grains (World Bank/WITS, 2023). Technological advancements, including precision agriculture and solar-powered irrigation, are gradually gaining traction, offering innovative solutions to enhance productivity and resilience. Additionally, the NAPF's alignment with Zimbabwe's Vision 2030 and global frameworks such as the Sustainable Development Goals (SDGs) draws critical funding and technical support. This alignment reinforces its credibility and relevance, strengthening partnerships with organisations like the FAO and NGOs. Initiatives targeting youth and women in agriculture also promote inclusivity, driving innovation and expanding opportunities for diversification.

Thus, while the vision articulated in the NAPF is ambitious, its realisation depends on overcoming systemic challenges while capitalising on existing opportunities. Effective policy implementation, improved infrastructure, stakeholder collaboration, and investments in technology and capacity-building are essential to transforming Zimbabwe's agricultural landscape. The journey toward crop diversification and reduced dependency on tobacco farming is challenging but achievable with the right balance of commitment, resources, and innovation.

04

Institutions and actors impacting diversification of crop production

Zimbabwe's journey toward alternative crop diversification is shaped by the collective efforts of various actors across different sectors, each playing a critical role in driving sustainable agricultural transformation. *Table 8* provides a summary of these institutions/actors and their roles.

Table 8: Institutions and actors impacting crop diversification in Zimbabwe

Category and institutions / Actors	Roles and contributions
Government institutions	
Ministry of Lands, Agriculture, Fisheries, Water, and Rural Resettlement	Leads policy development and implementation; spearheads programmes such as the National Agriculture Policy Framework (NAPF) and Pfumvudza Programme; promotes drought-resistant crops (sorghum, millet); distributes inputs to enable climate-smart agriculture.
Agribank (Agricultural Bank of Zimbabwe)	Provides financial support to farmers for agricultural activities.
Agricultural and Rural Development Authority	Implements rural development and extension programmes.
Agricultural Marketing Authority	Regulates agricultural marketing and ensures fair trade practices.
Cold Storage Commission	Supports post-harvest storage and distribution of produce.
Grain Marketing Board (GMB)	Facilitates grain marketing, storage, and distribution for food security.
Pig Industry Board of Zimbabwe	Supports pig production, research, and marketing.
Tobacco Industry and Marketing Board (TIMB)	Regulates the tobacco sector, promotes value addition, and supports alternative crops for diversification.
Tobacco Research Board	Researches tobacco derivatives and alternative crops such as chia and industrial hemp.
Farmers and farmer organisations	
Smallholder farmers	Implement crop diversification; adopt drought-resistant crops (sorghum, millet, sunflower); benefit from government and NGO programmes, particularly in drought-prone areas (Matabeleland, Masvingo).
Zimbabwe Farmers Union	Supports smallholder farmers in diversification and adoption of new crops.
Commercial Farmers Union	Advocates for market access and fair pricing for alternative crops.
Non-Governmental Organisations (NGOs)	
World Vision	Capacity building, technical support, and training workshops on climate-smart agriculture; provides inputs to smallholders.
Care International	Provides tools, seeds, and fertilisers; supports farmers in semi-arid regions to grow sorghum and cowpeas; ensures resilience to climatic shocks.
Food and Agriculture Organisation (FAO)	Provides technical expertise and supports capacity building and training.
Private sector and agribusinesses	
Seed Co	Develops drought-resistant crop varieties.
National Foods Ltd	Invests in processing facilities for crops like sesame and sunflower; creates market demand.
Export-focused agribusinesses	Generate demand for high-value crops, enabling farmers to diversify income streams.
Technology firms	Introduce innovations such as solar-powered irrigation systems to enhance productivity and sustainability.

Category and institutions / Actors	Roles and contributions
Research institutions	
Grasslands Research Station (Marondera)	Researches crop suitability, productivity, and conservation agriculture practices.
Henderson Research Centre (Mazowe)	Researches agricultural methods, drought-tolerant crops, and local adaptation strategies.
Matoos Agricultural Research Station (Matobo)	Studies crop performance in arid and semi-arid environments.
Tobacco Research Board	Investigates alternative crops, value-added products (oils, bio-compounds), and informs policy.
University of Zimbabwe	Agricultural research on climate-resilient crops, soil suitability, and value-addition.
Community-Based Organisations (CBOs)	
Village Development Committees (VIDCOs)	Mobilise farmers; provide localised advisory services; support adoption of conservation agriculture techniques; fill gaps left by national programmes in marginalised areas.
Regional and international partners	
Southern African Development Community (SADC)	Promotes regional climate adaptation programmes; facilitates exchange of best practices for drought-resistant crops.
World Bank	Provides financial and technical support; funds infrastructure to enhance farmers' access to markets; supports large-scale diversification projects.

05

Mechanisms supporting policy implementation

Zimbabwe's trade and industrialisation policies are facilitated by a web of mechanisms that either propel or constrain their implementation. These mechanisms operate at both macro and micro levels, shaping the nation's ability to drive sustainable economic growth, diversify exports, and foster industrial development. Zimbabwe's trade and industrialisation agenda holds significant potential to diversify the economy, promote sustainable exports, and strengthen industrial capacity. While mechanisms like robust policy frameworks, regional integration, and infrastructure development provide a solid foundation, structural challenges such as informality, policy misalignment, and economic constraints continue to hinder progress. Addressing these mechanisms is essential to realising the full promise of Zimbabwe's economic transformation.

5.1 Supporting mechanisms: strengthening the foundations

The National Development Strategy 1 (NDS1) served as a vital pillar in strengthening the foundations of Zimbabwe's agricultural sector. Anchored within the Vision 2030 framework, NDS1 emphasised modernisation, resilience, and

diversification as cornerstones for achieving sustainable economic transformation. NDS1 prioritised investments in infrastructure, such as roads, irrigation systems, and storage facilities, which are critical for improving agricultural value chains. Through these strategic foci, the NDS1 aimed to enhance farmers' access to both local and international markets, especially for alternative crops beyond tobacco.

A key focus of NDS1 lies in promoting climate resilience and environmental sustainability. The strategy advocated for the adoption of climate-smart agricultural practices, such as

conservation farming and the cultivation of drought-resilient crops like millet and sorghum. Furthermore, NDS1 promoted diversification into high-value alternative crops, such as horticultural produce and industrial hemp, which offer significant export potential. These efforts aim to reduce the nation's dependency on tobacco while opening pathways for new trade

opportunities. Private sector participation is another central element, with the strategy encouraging Public-Private Partnerships (PPPs) to drive investment in agro-processing facilities, input supply systems, and rural market development.

Institutional and policy support also featured prominently within NDS1. The framework strengthened the role of key government agencies, such as the Ministry of Lands, Agriculture, Fisheries, Water, and Rural Development, to ensure seamless alignment with sectoral policy frameworks like the NAPF. It emphasised enhancing the capacity of institutions to deliver extension services and research support, which are critical for fostering crop diversification and farmer innovation.

Crucially, NDS1 underscored the importance of inclusivity and equity in agricultural development. It advocated for targeted initiatives that support marginalised groups, including women and youth, ensuring that they have equitable access to resources and opportunities. This inclusivity is intended to foster broad-based growth and empower communities to fully participate in the agricultural transformation process.

By prioritising infrastructure development, climate-smart practices, institutional capacity building, and equitable growth, NDS1 served as a robust framework for supporting Zimbabwe's efforts to diversify its agricultural sector and transition toward a more sustainable and resilient future. It complemented existing policy initiatives and

provided a cohesive foundation for addressing the challenges identified in this analysis.

Building on the foundations laid under NDS1, the National Development Strategy 2 (NDS2) for the period 2026–2030 consolidates these gains and accelerates transformational goals aligned with Vision 2030 (UN in Zimbabwe, 2025). While NDS1 focused on addressing structural gaps and revitalising the agricultural sector through programmes such as Pfumvudza and irrigation expansion, NDS2 deepens this approach by prioritising climate-proofed agriculture, expanded irrigation, improved storage infrastructure, integrated land and water management, and enhanced productivity for food and nutrition security (New Ziana, 2025; ZBC News, 2026). Furthermore, NDS2 explicitly ties agricultural development to value addition and beneficiation, reinforcing the shift from raw commodity exports to higher-value agro-processing that can create jobs, strengthen linkages across value chains, and enhance access to both local and international markets for alternative crops beyond tobacco (UN in Zimbabwe, 2025; ZBC News, 2026). Together, these elements reflect a continuum from infrastructure and diversification priorities under NDS1 to a more integrated, climate-resilient, and market-oriented agricultural transformation under NDS2, with broader socio-economic goals such as inclusive growth and rural industrialisation underpinning the strategy (New Ziana, 2025).

Regional integration also serves as a key mechanism driving trade opportunities. Zimbabwe's active participation in the African Continental Free Trade Area (AfCFTA) opens up expansive markets for diversified exports like sesame, horticultural products, and processed goods. For example, the AfCFTA enables Zimbabwe to trade with countries like Nigeria and Egypt under preferential tariffs, reducing costs and enhancing competitiveness (Machemedze, 2023).

Infrastructure development plays a vital role in facilitating trade and industrialisation. The recent upgrades to the Beitbridge Border Post, Africa's busiest land border crossing, illustrate the government's commitment to improving trade facilitation (Construction Review, 2023). These upgrades reduce congestion and streamline customs processes, enabling faster movement of

goods into regional and international markets. Similarly, the development of industrial parks, such as the Zimbabwe Dry Port Facility in Namibia, enhances logistical capacity for exporting goods like minerals and agricultural products (The Sunday News, 2024).

Private sector engagement is another driving force, with large companies such as Seed Co investing in the production of drought-resistant crops and advanced agricultural technologies. This support helps farmers scale up production and access export markets, aligning with the goals of industrial growth.

5.2 Hindering mechanisms: structural and operational challenges

While there are commendable efforts supporting industrialisation and trade policies, significant constraints hinder their successful implementation. One major challenge is pervasive informality in Zimbabwe's economy. With small and medium enterprises (SMEs) contributing 72% of GDP, most operations lack certification, licensing, and compliance with export standards. For example, horticultural products from informal farmers often face barriers to accessing European markets due to stringent quality regulations.

Policy alignment remains a critical gap affecting cohesion between trade and industrialisation goals. While trade policies like the Zimbabwe National Trade Policy Vision 2030 prioritise export diversification, industrial policies often fall short of providing adequate support for local manufacturing. This misalignment can be seen in the agricultural sector, where efforts to promote processed food exports are hampered by limited investments in agro-processing infrastructure.

Economic constraints further exacerbate implementation challenges. High production costs driven by unstable electricity supply, elevated input prices, and inadequate access to financing reduce competitiveness. For instance, the energy deficits experienced by industries like mining and manufacturing create interruptions that slow down productivity and compromise export timelines.

Infrastructure deficiencies, despite some improvements, remain a bottleneck. In rural areas, poor road networks limit access to markets for farmers growing alternative crops such as millet and sunflower. Additionally, limited capacity at processing facilities hinders the value addition required to meet international market standards. The underutilisation of tobacco processing plants is an example of this gap.

Lastly, capacity challenges within institutions tasked with implementing policies restrict their effectiveness. For example, while research institutions like the Tobacco Research Board have an expanded mandate under NDS2 to provide critical insights into

diversification, limited funding and technical expertise hamper their ability to scale up their findings into actionable national programmes.

5.3 Subnational level institutional and market dynamics

Agricultural production at the subnational level in Zimbabwe operates within a complex web of institutional and market dynamics, each playing a significant role in shaping the opportunities and challenges faced by farmers. These dynamics influence not only the methods of production but also access to resources, markets, and livelihoods, particularly for smallholder farmers and marginalised communities.

Institutional dynamics: navigating local frameworks

At the heart of subnational agricultural systems are local government structures, such as Rural District Councils (RDCs). These councils oversee crucial functions, including land allocation in areas under their jurisdiction, infrastructure development, and the enforcement of policies and programmes like Pfumvudza. RDCs are instrumental in distributing inputs and coordinating support for smallholder farmers, ensuring that the benefits of national policies trickle down to the grassroots level. However, their effectiveness is often constrained by limited financial and technical capacity, which can lead to gaps in service delivery.

Agricultural extension services, provided by extension officers, are pivotal to equipping farmers with technical knowledge and promoting climate-smart agricultural practices. These officers help smallholder farmers adopt innovative techniques, such as mulching and crop rotation, which enhance soil health and resilience to climate shocks. Despite their critical role, extension services face challenges like understaffing and inadequate resources, limiting their reach and impact.

Community-based organisations (CBOs) such as farmer cooperatives and Village Development Committees (VIDCOs) play an essential role in mobilising collective action and sharing knowledge. For instance, farmer cooperatives provide platforms for resource pooling and facilitate market access, making it easier for smallholders to sell their produce. However, the effectiveness of these

organisations varies across regions, with some lacking the organisational capacity to drive meaningful change.

Research institutions like the Tobacco Research Board and local universities contribute to agricultural production by developing drought-resistant crop varieties and exploring avenues for value addition. These innovations are vital to diversifying agricultural outputs and enhancing farmer resilience. However, limited funding and weak linkages between research findings and policy implementation often restrict the real-world application of their work.

Market dynamics: balancing access and equity

Market access is a key factor influencing agricultural production at the subnational level. In many areas, poor infrastructure, such as inadequate road networks and storage facilities, creates barriers to accessing larger markets, forcing farmers to rely on local and informal markets. While these informal markets provide immediate income, they are often unstable and expose farmers to price volatility.

The value chains for alternative crops like sesame and sunflower remain underdeveloped. Farmers often face difficulties in accessing processing facilities and securing buyers, which limits the profitability and scalability of these crops. In contrast, tobacco dominates in many regions, benefiting from well-established value chains that include financing, processing, and export opportunities.

Private sector engagement also shapes agricultural production at the subnational level. Agribusinesses like Seed Co and National Foods Ltd provide critical support, including access to inputs, technical expertise, and market opportunities. These companies play a significant role in driving innovation and scaling up production. However, their focus on high-value crops for export can marginalise subsistence farmers who lack the resources to participate in these markets. For example, private sector investment in high-value horticulture, particularly in export crops such as blueberries and avocados, has expanded rapidly in Zimbabwe, with blueberry export revenues rising sharply and avocado production climbing significantly, yet smallholder farmers often struggle to meet the stringent quality standards and capital

requirements needed to participate fully in these lucrative export value chains (AllAfrica, 2025; Business Daily News Zimbabwe, 2025).

Regional trade dynamics further influence agricultural production. Proximity to neighbouring countries like South Africa and Zambia creates opportunities for farmers to grow crops in high demand across borders. For example, farmers near border areas often prioritise crops like maize and sorghum to tap into regional markets.

The interplay: opportunities and challenges

The interaction between institutional and market dynamics creates a delicate balance of opportunities and challenges at the subnational level. While RDCs and extension services aim to provide crucial support to farmers, their efforts are often undermined by infrastructural and market constraints. Similarly, private sector investments drive innovation and market development but may inadvertently exclude smallholders from high-value markets.

To address these complexities, a coordinated approach that strengthens institutional capacity, improves infrastructure, and fosters inclusive market systems is essential. By bridging these gaps, Zimbabwe can unlock the full potential of agricultural production at the subnational level, enhancing livelihoods and driving economic sustainability.

5.4 Food crop trade dynamics and analysis

Zimbabwe's agricultural trade landscape is closely tied to the nation's quest for diversification amid the dominance of tobacco as its primary export crop. While recent surplus wheat production has reduced reliance on cereal imports, the country continues to import significant quantities of maize and rice to meet domestic demand and balance food security (See Table 3). This section, framed within the broader theme of exploring alternative crop production, examines the dynamics of food crop imports, including their types, costs, sources, and drivers. By assessing these trends, the analysis sheds light on the opportunities and constraints Zimbabwe faces in developing sustainable alternatives that complement its tobacco-centric economy.

Types of food crops imported

Zimbabwe primarily imports staple food crops to address domestic shortages and meet dietary needs. The most common imports include maize, wheat, and rice, which serve as key components of the national diet. Maize is particularly critical, as it forms the basis of Zimbabwe's staple dish. Additionally, soybeans are imported to support the local production of cooking oil and stock feed, reflecting the growing demand in these sectors. These imports are largely seasonal and influenced by local production shortfalls, particularly during years of poor harvests or drought.

Costs of imports

The cost of food crop imports has risen significantly in recent years, driven by multiple factors. Global market price fluctuations, coupled with Zimbabwe's currency instability, have made imports more expensive. For instance, maize imports during drought years have been costly due to heightened regional demand and logistical challenges. Rising transport costs also contribute to the growing expense, adding pressure on national budgets and foreign currency reserves. This financial burden underscores the need for enhanced local production to reduce dependency on imports.

Sources of imports

Zimbabwe sources its food crop imports from a range of countries, depending on regional availability and trade agreements. South Africa emerges as a key supplier, providing maize and wheat due to its proximity and established trade relations. Zambia is another critical partner, especially during maize shortages, as it frequently has surplus production to export. Beyond the region, Zimbabwe relies on Asian countries like India and Thailand for rice imports, catering to the preferences of urban consumers. This diversity of sources reflects Zimbabwe's reliance on both regional and international markets to ensure food security.

Drivers of imports

Several drivers explain Zimbabwe's dependence on food crop imports. Climate variability plays a significant role, with erratic rainfall and prolonged droughts often leading to local production deficits. For instance, severe droughts in recent years have slashed maize harvests, compelling the government

to import large quantities to fill the gap. Additionally, systemic production challenges, such as limited access to farming inputs, outdated techniques, and poor infrastructure, hamper agricultural productivity. Population growth further intensifies demand, outpacing the capacity of local production to sustain the growing population. Finally, economic constraints, including currency devaluation and inflation, make it challenging for local producers to compete with imported goods, further fuelling the reliance on foreign crops.

Climate variability

Zimbabwe's agricultural sector is highly vulnerable to climate variability, which significantly impacts local food production. Erratic rainfall patterns, prolonged droughts, and occasional floods have led to reduced yields, particularly for staple crops like maize and wheat. For example, during the 2018–2019 drought, maize production fell drastically, necessitating large-scale imports to meet domestic demand. Climate change continues to exacerbate these challenges, making reliance on imports a critical strategy for ensuring food security during adverse weather conditions.

Production challenges

Structural issues within Zimbabwe's agricultural sector hinder its ability to meet domestic food needs. Limited access to farming inputs such as seeds, fertilisers, and irrigation systems reduces productivity, particularly for smallholder farmers who dominate the sector. Outdated farming techniques and insufficient mechanisation further constrain production capacity. Additionally, the deterioration of irrigation infrastructure following the land reform programme has left many farmers dependent on rain-fed agriculture, which is less reliable and more susceptible to climate shocks.

Population growth

Zimbabwe's population has been steadily increasing, driving up demand for food crops. Urbanisation has also shifted consumption patterns, with a growing preference for imported rice and wheat-based products among urban dwellers. This rising demand often outpaces local production capacity, creating a gap that must be filled through imports. For instance, rice imports from countries like India and Thailand have surged to cater to urban consumption needs.

Economic constraints

Economic challenges, including currency devaluation and inflation, play a significant role in driving food crop imports. The depreciation of the Zimbabwean dollar reduces the affordability of locally produced goods, making imports a more viable option for consumers. Inflation further erodes purchasing power, affecting the ability of farmers to invest in production and compete with imported goods. These economic pressures have led to increased reliance on imports to stabilise food availability and prices.

Market dynamics

Market dynamics also influence food crop imports. Regional trade agreements and proximity to neighbouring countries like South Africa and Zambia facilitate the importation of maize and wheat during shortages. However, trade barriers such as tariffs and non-tariff measures can sometimes complicate these transactions. Additionally, global market trends, including price fluctuations and supply chain disruptions, impact the cost and availability of imported food crops.

The AfCFTA intends for countries to increase the market for their goods and services with minimum restrictions. To achieve this, countries should: eliminate tariff and non-tariff barriers to trade; liberalise trade in services; co-operate in all trade and related matters of intellectual property rights, investment and competition, among others; have a mechanism for settlement of disputes; and an institutional framework for the implementation and administration of the AfCFTA. It is anticipated that offering larger

markets will generate the investments needed to grow economies and foster development. In line with the Sustainable Development Goals (SDGs), the AfCFTA seeks to promote green jobs, fight climate change through the implementation of agreed technical standards across different sectors, and transform African economies to be competitive regionally, continentally and globally.

These noble objectives face challenges, however, in inherent systemic and structural issues, including non-tariff barriers that have impacted trade among African countries, like licensing requirements, red tape, governance issues, and time-consuming and inefficient border procedures (Hartzenberg, 2011).

Export dynamics: Framework Convention on Tobacco Control (FCTC)

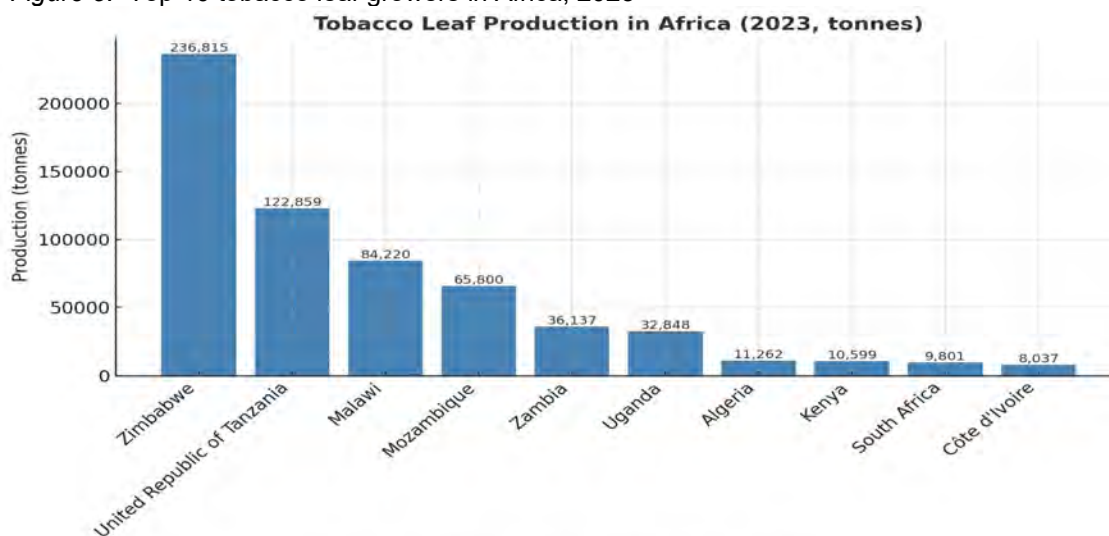
As was noted in *section 2*, Zimbabwe's agricultural export landscape reveals a dynamic and evolving interplay between economic priorities, global demand, and domestic production capabilities. Tobacco remains a major agricultural export, reinforcing its dominant position as Zimbabwe's most valuable cash crop. The Far East, particularly China and South Korea, continues to serve as the primary market for Zimbabwe's high-quality flue-cured Virginia tobacco. European countries and the Middle East also import significant quantities, reflecting sustained global demand despite increasing anti-smoking campaigns necessitated by the World Health Organisation's Framework Convention on Tobacco Control (FCTC).

Figure 4: Tobacco exports vs food imports (2003-2021)



As shown in *Figure 4*, unmanufactured tobacco is a highly traded high-value product in Zimbabwe and in Africa. The WHO reports that countries in East and Southern Africa account for 92.5% of tobacco leaf production in Africa, with Zimbabwe, Zambia, Tanzania, Malawi, Mozambique, Uganda, South Africa and Kenya occupying the first eight of the ten slots of top producers in Africa, alongside Algeria and Côte d'Ivoire, as shown in *Figure 5* (WHO, 2021).

Figure 5: Top 10 tobacco leaf growers in Africa, 2023



Source: FAOSTAT (Unmanufactured tobacco, Production Quantity, 2023)

The WHO FCTC is a global treaty aimed at reducing tobacco consumption and its associated health risks. It emphasises measures such as increasing tobacco taxes, restricting advertising, implementing smoke-free policies, and promoting public awareness campaigns. While Zimbabwe ratified the treaty in 2014, its implementation has been complex due to the country's heavy reliance on tobacco as a key economic driver (Bandara et al., 2025). However, aligning with the WHO FCTC's supply-reduction

measures, such as discouraging tobacco farming and limiting industry influence, poses challenges. For instance, the government has continued to provide financial incentives to promote tobacco production, which contradicts the treaty's objectives.

This duality highlights the need for a nuanced approach that considers both public health imperatives and the socio-economic importance of tobacco farming in the country.

While tobacco dominates, other crops are slowly gaining traction in the export market as the country strives for diversification. Horticultural products such as blueberries, citrus fruits, and peas have seen increasing demand, particularly in Europe and South Africa, where consumers value organic and high-quality produce. Industrial hemp is also emerging as a promising alternative crop, with markets opening up in North America and Europe for its use in textiles, bio-compounds, and sustainable products. These new export avenues signify Zimbabwe's efforts to reduce its dependence on tobacco and expand its agricultural portfolio.

The drivers of these trends are multifaceted. The global demand for Zimbabwe's tobacco remains resilient, attributed to its unique flavour and high quality, which appeal to premium cigarette manufacturers. Additionally, tobacco's relative resilience to climatic shocks ensures consistent output, even in adverse weather conditions. For other crops, value addition and local processing have enhanced competitiveness in international markets. Government policies, such as export retention schemes, have also incentivised farmers and agribusinesses to scale up production and invest in export-oriented farming.

This dynamic export environment reflects both the strengths and the transitions underway in Zimbabwe's agricultural sector. The country remains steadfast in its pursuit of balancing its traditional reliance on tobacco with a diversified and resilient export portfolio, aligning with broader goals of economic sustainability and global competitiveness.

5.5 Balancing tobacco prioritisation with food security

The expansion of tobacco farming, particularly among smallholder farmers drawn by the promise of high financial returns, has displaced food crop production across many regions. Limited land, labour, and resources are often allocated to tobacco at the expense of staples like maize, Zimbabwe's most important food crop. This shift has led to reduced domestic food production, compelling the country to import substantial quantities of maize, rice, and wheat to meet local demand. During drought years, these imports become even more

critical, creating high import bills and straining Zimbabwe's foreign currency reserves.

While tobacco farming provides marginal economic benefits to communities, the gains come with a range of costs. On the positive side, tobacco has at times provided higher income opportunities for farmers, enabling investments in education, healthcare, and local infrastructure. The crop's established value chain also creates jobs across farming, processing, and export logistics, providing employment to thousands in rural areas. Furthermore, contract farming arrangements offer tobacco farmers access to inputs such as seeds and fertilisers, lowering barriers to entry for smallholder farmers and fostering economic empowerment.

However, the costs of tobacco prioritisation cannot be ignored. The displacement of food crop production increases vulnerability to food insecurity, particularly in regions heavily dependent on imports to supplement maize shortages. Environmental degradation resulting from tobacco farming, such as deforestation and soil erosion, poses long-term risks to agricultural sustainability. Additionally, with food prices often rising due to reliance on imports, households struggle to access diverse and nutritious diets, affecting community health and nutrition.

This intricate interplay between economic and social outcomes underscores the nexus of gains and costs within Zimbabwe's tobacco-centric agricultural model. While communities enjoy short-term benefits, the reliance on imports to meet basic food needs highlights the fragility of this approach. Addressing these trade-offs requires balancing priorities through policies that incentivise alternative crop production. Climate-resilient crops such as sorghum and millet, along with high-value horticultural produce, offer viable options that complement and, over time, potentially take the place of tobacco farming while enhancing food security.

Ultimately, Zimbabwe's agricultural future rests on its ability to harmonise economic goals with sustainable practices, ensuring that community gains are not outweighed by long-term costs. By diversifying its agricultural base and strengthening food systems, the nation can create a resilient framework that supports both livelihoods and food security.

06

Discussion: rethinking agricultural dependency and diversification strategies

The findings reveal a complex agricultural landscape in Zimbabwe, characterised by heavy reliance on tobacco for export earnings and a growing need to diversify production to achieve broader socio-economic and environmental goals. While tobacco remains the backbone of Zimbabwe's agricultural economy, contributing over 50% of agricultural export revenue, this dependency has created systemic vulnerabilities, including limited food production, reliance on imports, environmental degradation, and uneven rural development. Analysing these trade-offs against the backdrop of diversification efforts provides critical insights into pathways for sustainable agricultural transformation.

6.1 Implications for reducing dependency on tobacco

Zimbabwe's prioritisation of tobacco has yielded significant economic benefits. However, this focus raises crucial questions regarding sustainability. As noted in the trade analysis, tobacco farming occupies considerable land and labour resources. While the macroeconomic benefits are more visible, it is important to consider the microeconomics of tobacco growing for smallholder farmers and the challenges that they face year over year. Additionally, the displacement of staple crops like maize has increased reliance on imports, contributes to the strain on foreign currency reserves, and exposes the country to global supply chain instability.

The findings also highlight the opportunity to reduce dependency through strategic diversification into crops such as industrial hemp, horticultural products, and small grains. Industrial hemp's growing

International demand for use in sustainable industries, along with the rising popularity of Zimbabwean blueberries and citrus fruits in European markets, demonstrates the potential for high-value crop exports to supplement and eventually rival tobacco revenues. Climate-resilient crops like millet and sorghum, which are suited to Zimbabwe's semi-arid regions, provide additional opportunities to enhance domestic food security while contributing to regional trade.

6.2 Fostering diversified livelihoods

Diversifying agricultural production has far-reaching implications for farmer livelihoods. Findings from the policy landscape highlight initiatives such as the Pfumvudza Programme and conservation agriculture, which promote sustainable farming practices and alternative crop production. These programmes aim to empower smallholder farmers to adopt resilient crop varieties while improving soil health. Diversification into crops like paprika, sesame, and industrial hemp offers new income streams for farmers, reducing their reliance on tobacco while maintaining economic stability.

However, fostering diversified livelihoods requires addressing key challenges identified in the governance and market dynamics analysis. Farmers transitioning from tobacco to alternative crops face barriers such as limited access to inputs, weak market linkages, and insufficient value chain infrastructure. Strengthening extension services and research institutions will be essential to equipping farmers with the knowledge and resources to adopt diverse crops.

6.3 Gaps and challenges

Tobacco's persistence is best explained by the market conditions around it, rather than by its returns alone. Merchants advance seed, fertiliser and chemicals on credit and recover the cost at the point of sale. For cash constrained households, this is often the only seasonal finance available. Farmers also have established buyers, a known selling season, technical support under contract schemes, and a regulated marketing system with auction floors, grading and partial payment in foreign currency. Together, these conditions reduce the perceived risk of growing tobacco, even though contract arrangements leave many farmers in debt (Chingosho et al., 2021). Alternative crops face almost the reverse. The barriers noted in section 6.2, namely limited access to inputs, weak market linkages and thin value chains, mean that a farmer leaving tobacco gives up a whole support system, not just a crop. A viable transition therefore depends on building comparable security for alternative crops, through input finance linked to assured markets and a functioning marketing infrastructure

Several gaps identified in the analysis hinder the realisation of diversification goals.

- As noted in the trade analysis, the absence of robust supply and value chains for alternative crops limits their competitiveness in international markets. For instance, while industrial hemp has export potential, processing facilities and certification standards remain underdeveloped.
- Weak collaboration among government ministries, private sector actors, and NGOs creates inefficiencies in implementing diversification programmes. Extension services, though critical to farmer support, are often under-resourced, stemming from the IMF/World Bank Structural Adjustment Programmes era.
- Farmers accustomed to the input credit, assured buyers and established markets of tobacco may resist transitioning to alternative crops without strong incentives and guaranteed market access.
- While diversification offers climate-smart solutions, the findings highlight the environmental costs of tobacco farming, including deforestation and soil degradation, which undermine efforts to scale up sustainable practices.

Opportunities for intervention

Despite these challenges, the findings reveal several opportunities for intervention.

1. Investments in processing facilities for crops like small grains, industrial hemp, and horticultural produce can unlock export opportunities and drive rural industrialisation through value addition and processing.
2. Policies promoting subsidies, input support, (including input credit linked to guaranteed offtake) and market linkages for alternative crops can incentivise farmers to diversify without jeopardising their livelihoods. Policy realignment, therefore, is of paramount importance
3. Leveraging platforms such as the African Continental Free Trade Area (AfCFTA) can expand market access for diversified crops, particularly those suited to Zimbabwe's climatic conditions.
4. Developing irrigation infrastructure, introducing drought-tolerant crop varieties, and promoting conservation agriculture will strengthen resilience to climate shocks and stabilise production.
5. Engaging farmer cooperatives, NGOs, and community-based organisations in participatory planning will ensure that diversification efforts align with local needs and capacities.
6. Establishing organised marketing systems for alternative crops, with grading standards, designated selling points, fair contract terms and timely payment, can offer farmers the market security that tobacco provides without reproducing its debt risks

The findings demonstrate that reducing dependency on tobacco and fostering diversified livelihoods requires an integrated strategy that balances economic priorities with sustainable practices. By addressing gaps in market infrastructure input finance, institutional capacity, and farmer support, Zimbabwe has the potential to build a robust agricultural system that enhances food security, reduces reliance on imports, and unlocks new export opportunities. Policy realignment, capacity building, and climate adaptation investments are critical to achieving this vision, ensuring that communities benefit from inclusive and sustainable agricultural development.

07

Recommendations

The findings from this analysis underscore the need for Zimbabwe to recalibrate its agricultural sector, reducing dependency on tobacco while fostering diversified livelihoods and sustainable development. This requires not only targeted policy interventions but also a cohesive strategy that addresses institutional coordination and market barriers. By leveraging these recommendations, Zimbabwe can create an agricultural framework that balances economic priorities, environmental sustainability, and social well-being. The following recommendations are designed to provide actionable pathways for achieving these goals.

Category	Recommendations
Policy and Trade Strategies	
Targeted incentives for alternative crops	Provide targeted subsidies, input support, and financial incentives for the production of crops such as millet, sorghum, industrial hemp, and horticultural produce, while offering tax incentives to agribusinesses, processors, and investors involved in alternative crop value chains.
	Strengthen input support systems by ensuring affordable, reliable access to seeds, fertiliser, credit, and extension services for alternative crops, while exploring targeted pricing or market support mechanisms to promote stable, predictable farmer incomes.
	Capacitate the Agricultural and Rural Development Agency (ARDA) to lead in alternative crop farming at a large scale.
Value addition and processing facilities	Invest in rural transport, storage and market infrastructure to ensure farmers can efficiently access domestic and export markets, while also supporting processing facilities for crops such as small grains, horticulture, and industrial hemp to boost value and market readiness.
	Promote value addition by supporting small and medium enterprises (SMEs) in agro-processing industries.
Trade integration and regional market access	Leverage the SADC, COMESA and AfCFTA to access regional and continental markets with reduced tariffs and streamlined processes.
	Engage in bilateral and multilateral agreements to expand alternative crop export markets in Europe, Asia, and neighbouring African nations, while advocating for fairer market access and the reduction of overly restrictive sanitary and phytosanitary regulations that function as non-tariff trade barriers to agricultural exports from Africa to Europe.
Climate-smart agriculture policies	Promote drought-resilient crops like small grains and conservation agriculture practices such as pfumvudza and crop rotation.
	Invest in irrigation systems and climate-resilient infrastructure to reduce reliance on rain-fed agriculture.
Tobacco revenue allocation	Allocate a portion of tobacco export earnings through targeted levies or taxes on leaf-buying and exporting companies to finance agricultural diversification initiatives, farmer capacity-building programmes, and the development of alternative crop value chains.
Institutional coordination and market barriers	
Inter-ministerial collaboration	Establish a centralised coordination mechanism, supported by the Office of the President and Cabinet and the Ministry of Finance, across the Ministries of Agriculture, Trade, and Environment to promote agricultural diversification and ensure coherent policy implementation.

Category	Recommendations
	Create multi-stakeholder forums for collaboration between government, private sector, and civil society.
Extension services and research	Expand funding for Agriculture extension officers to enhance farmer outreach and training for diverse crops.
	Strengthen research institutions to translate findings into actionable policies and programmes.
Market infrastructure	Develop rural infrastructure (roads, storage, market centres) to ensure efficient access to alternative crop markets.
	Promote farmer cooperatives for collective marketing and bargaining power.
Trade facilitation for smallholders	Simplify certification and licensing to help farmers access export markets.
	Provide technical assistance to meet international trade standards, including sanitary and phytosanitary measures.
Community engagement	Partner with NGOs and local organisations to support grassroots initiatives for capacity building and input provision.
	Involve farmers and community leaders in participatory decision-making to reflect localised needs.
Digital solutions for market connectivity	Deploy digital platforms to link farmers with buyers and processors, ensuring market transparency.
	Use technology to disseminate best practices, market information, and climate-smart techniques.

08 Conclusion

Zimbabwe's agricultural sector serves as a critical pillar of its economy, with tobacco dominating export earnings and shaping rural livelihoods, especially where it is grown by smallholder farmers. However, this reliance on tobacco presents challenges such as food insecurity, environmental degradation, and limited agricultural diversity. The analysis highlights key findings, including the dominance of tobacco in export markets, the rising dependence on food crop imports, the opportunities for alternative crop production, and the institutional and market dynamics shaping agricultural trade. These findings are deeply relevant to Zimbabwe's agricultural and trade strategies, underscoring the need for diversification, sustainable practices, and strengthened institutional coordination.

Balancing economic resilience, food security, and sustainability requires an integrated approach that prioritises alternative crop production, invests in market infrastructure, and promotes climate-smart agriculture. By aligning policies, fostering collaboration, and addressing market barriers, Zimbabwe can reduce dependency on tobacco while building a resilient agricultural system that meets local food needs, empowers rural communities, and expands global trade opportunities. This balanced strategy not only ensures stability in the face of global changes but also paves the way for inclusive and sustainable development.

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Appendix 1: Methodology

This study employed a desk review methodology, drawing on a broad range of secondary sources to provide a comprehensive exploration of agriculture, industrialisation, and trade dynamics and their implications for tobacco control in Zimbabwe. By examining existing literature, the study leveraged insights from research papers, government reports, policy documents, and other relevant materials to form the foundation of its analysis. The first part of the paper involved a comprehensive analysis of the policy landscape at both national and subnational levels. This included evaluating frameworks, mechanisms, and pathways shaping the development of alternative crops and non-tobacco farming systems. Using a trade-focused perspective, the study investigated how policies, institutions, and stakeholders either facilitate or obstruct these efforts, while also addressing structural issues and governance dynamics.

The second section utilised secondary data and Zimbabwe's trade statistics to delve into the economic context of tobacco

prioritisation. This analysis examined the nature and trends of agricultural imports and exports, focusing on the costs, sources, and drivers of food imports and their relation to the earnings generated from tobacco sales. It also evaluated the history and shifts in agricultural exports, including substitution patterns, and explored the drivers behind these trends, such as fiscal policies and market factors. Additionally, the paper incorporated a governance analysis to uncover how institutional and market dynamics influence agricultural production, particularly at the subnational level. It identified the roles and interactions of key actors, highlighting issues and mechanisms that shape the policy and trade environment for alternative crops.

By combining policy analysis, trade data evaluation, and governance assessment, the paper provides an integrated understanding of Zimbabwe's agricultural landscape and its challenges. It offers actionable recommendations for achieving a balanced approach to trade, industrialisation, and agriculture, intending to reduce tobacco dependence and foster diversified, sustainable agricultural practices.