Groundnuts Subsector Study
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### List of Acronyms

<table>
<thead>
<tr>
<th>Acronym</th>
<th>Full Form</th>
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<tbody>
<tr>
<td>ATA</td>
<td>Appropriate Technology Africa</td>
</tr>
<tr>
<td>AGRITEX</td>
<td>Agricultural Technical and Extension Services</td>
</tr>
<tr>
<td>CIT</td>
<td>Cash in Transit</td>
</tr>
<tr>
<td>CFU</td>
<td>Commercial Farmers Union</td>
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<tr>
<td>CCZ</td>
<td>Consumer Council of Zimbabwe</td>
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<tr>
<td>FAO</td>
<td>Food and Agriculture Organization</td>
</tr>
<tr>
<td>GMB</td>
<td>Grain Marketing Board</td>
</tr>
<tr>
<td>IRD</td>
<td>International Relief and Development</td>
</tr>
<tr>
<td>NGO</td>
<td>Non-Governmental Organizations</td>
</tr>
<tr>
<td>NFU</td>
<td>National Farmers Union</td>
</tr>
<tr>
<td>SNV</td>
<td>Netherlands Development Organization</td>
</tr>
<tr>
<td>VCA</td>
<td>Value Chain Analysis</td>
</tr>
<tr>
<td>ZFU</td>
<td>Zimbabwe’s Farmers Union</td>
</tr>
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Background of the Study
SNV was engaged by the Danish International Development Organisation (DANIDA) to implement the Rural Agriculture Revitalisation Project - Commercialisation of Smallholder Farmers (RARP CSF), an initiative which seek to facilitate commercialisation of smallholder agriculture with a view to promote improved household incomes, employment and food security. The project aim was to reach 280,000 smallholder farming households throughout all eight rural provinces in Zimbabwe.

The development objective of the project was to commercialise smallholder farming in the country by re-instating sustainable commercial input and output marketing channels as well as technical and business development services provision. The RARP CSF was implemented following an integrated value chain development approach that addresses all constraints hindering growth in specific sub sectors.

The project components which include improving small scale farmers’ access to the right and high yielding inputs, development of win-win sustainable contract farming arrangements and provision of effective business development services have been designed to facilitate the revitalisation of the horticulture, oil seeds and dairy sub sectors.

**The project’s immediate objectives are:**

1. **To facilitate** access to credit for intermediaries in the agricultural and food value chains.

2. **To promote** private sector competitiveness through “Matching Grants” that will promote technology upgrades and market development.

3. **To promote** food security through improved access to inputs and output marketing channels and processing services.

4. **To facilitate** smallholder farmers participation in formal markets through development of the dairy, oil seeds and horticulture value chains.

5. **To consolidate** and enhance programme development through studies, pilots and innovation.

This study sought to enable SNV-Zimbabwe identify and understand the groundnuts value chain dynamics regarding actors (from farmers to firms), channels, markets trends, viability and production and consumption trends.

Such an understanding would inform SNV’s overall exploration of ways to support groundnuts production and productivity through, inter alia, enhancing private sector participation and increasing the number of smallholder farmers pursuing groundnuts production on a commercial basis under the RARP CSF Oilseeds component and for the benefit of other agencies and actors who wish to intervene in this sub-sector.
Groundnuts in Zimbabwe are grown in natural (Farming) regions 2 to 3 under dry land conditions, and in regions 4-5 under irrigation. Though predominantly considered a woman’s crop, smallholder and commercial groundnut growers are estimated above 1.5 million and below 10,000 farmers respectively.

There is private sector willingness to support the subsector benefiting producers while ensuring dependable availability of industrial raw materials. National commercial demand for groundnuts is estimated between 120,000 tonnes and 130,000 tonnes per year (USAID 2010). Production figures for the 2010/11 and 2011/12 seasons were 230,475 tonnes and 120,001 tonnes respectively (GRZ 2012). Because of the weak marketing arrangements for groundnuts, only a comprehensive study of all processors can establish the proportion of local commercial demand met through local smallholder produce.

The subsector has distinct players as shown in Table 1. Large groundnuts processors depend on imports from Malawi and Zambia for their processing requirements (USAID 2010). Two factors that explain why local sourcing is supplanted with imports are: Firstly, mobilizing groundnuts beyond four months after harvest becomes extremely difficult and expensive. The second reason is that smallholders in Zimbabwe use returned seed and the varieties grown are not readily suited to confectionery uses. Additionally processing of small sized seed is difficult.

### 1.1 Study Approach

This study used the Value Chain Analysis (VCA) approach of groundnut sub sector. It involved review of literature and interviews with key informants or subsector experts working in strategic organizations (see Table 1). The study tried to understand issues and prospects of the sub sector by focusing on:

1. Primary actors in the sub-sector, their roles, responsibilities and relationships
2. Market channels and trends within the sub-sector
3. Constraints that are holding back growth and competitive opportunities that can benefit the smallholder farmers
4. Value chain governance structures
5. Service providers to the value chain.

<table>
<thead>
<tr>
<th>Category of Respondents /Institutions</th>
<th>Number</th>
</tr>
</thead>
<tbody>
<tr>
<td>Farmers</td>
<td>18</td>
</tr>
<tr>
<td>Farmer Organizations</td>
<td>4</td>
</tr>
<tr>
<td>Input Suppliers</td>
<td>3</td>
</tr>
<tr>
<td>NGOs/Development Partners</td>
<td>3</td>
</tr>
<tr>
<td>Processors</td>
<td>3</td>
</tr>
<tr>
<td>Public Sector/Regulator</td>
<td>3</td>
</tr>
<tr>
<td>Research Institution</td>
<td>1</td>
</tr>
</tbody>
</table>

*Table 1: Data sources by category*
Groundnut is beneficial in dietary terms as it is a good source of protein, edible oils, energy, minerals and vitamins. It is a very good rotation crop because of its nitrogen fixing qualities while also useful for the production of animal feeds. In Zimbabwe it is mainly concentrated in ecological regions 2-4 of the country with parts of Manicaland and Mashonaland East provinces being the major producing areas in terms of area planted and output (see Figures 1 and 3). Women contribute 75%¹ of production and marketing of groundnuts. They supplement the household income through local sales of shelled and unshelled nuts as well as peanut butter.

2.1 Key Players

The sub-sector has many players from production to processing. See Table 3.

<table>
<thead>
<tr>
<th>Function</th>
<th>Example of Actors</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Input suppliers (Fertilizers, Seed, etc)</strong></td>
<td><strong>Fertilizer Companies:</strong> Zimbabwe Fertilizer Company &amp; Windmill</td>
<td>● Have urban-based distribution points ● Produce specialized fertilizers for groundnuts ● Some have good networks of rural agro-dealers and thus input distribution network ● Some, e.g. Agri-Seeds, have contracted smallholder farmers to grow groundnut seeds.</td>
</tr>
<tr>
<td></td>
<td><strong>Seed Companies:</strong> Seed Co., Pioneer, Prime Seeds, Agri-Seeds &amp; Pannar</td>
<td></td>
</tr>
<tr>
<td><strong>Producers</strong></td>
<td>Smallholder farmers in North Eastern (Mount Darwin, Mudzi) and Eastern districts (Makoni, Buhera, Hwedza, Chikomba), Masvingo (Gutu, Zaka, Bikita and Masvingo) and Mashonaland (Chikomba, Hurungwe and Hwedza)</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Category</th>
<th>Company Examples</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Bulk Buyers</strong></td>
<td>Monakem Investments, Agricom, Agri-Seeds, REAPERS, Predom Investments &amp; Berekabury</td>
<td>Buyers purchase unshelled groundnuts at USD600 per tonne and shelled between USD750 and USD1,000</td>
</tr>
<tr>
<td><strong>Processors</strong></td>
<td>Nutresco, REAPERS, Lyons, Karima Investments, Cairns, etc.</td>
<td>Combine imports and local purchases with imports meeting up to 90% of raw materials when local produce is out of stock. Others combine growing their own crop and local purchases (e.g. REAPERS) and from other contract farmers</td>
</tr>
</tbody>
</table>

2.2 Input Supply: Issues and Prospects

For the inputs required for groundnuts production, the Government and Seed Houses (SeedCo,

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¹ Interview with Rob Kelly 19 September 2012
Agriseeds etc) have bred over 11 groundnut varieties. SeedCo has developed 3 groundnut seed varieties (SC Orion, SC Nyanda and SC Mwenje). A total of 2000t² of seeds is bulked across all seed houses which is insufficient to make an impact on production. The majority of smallholders thus use retained seeds (shunning certified grades). This explains why seed houses argue that there is no effective demand for certified groundnuts seed.

The reasons farmers often cite the for not using certified seeds are:

1. The certified seeds require management practices and equipment that smallholder farmers are unused to.
2. The certified seeds are too risky in drier climates. These varieties do better under irrigation.
3. Smallholder farmers think certified seeds need external inputs for optimal production, which makes their operations expensive.

Smallholders use returned seeds that does not require intensive management practices. Their variety of choice is the Natal Common.

The production of a hectare of groundnuts costs US$404.00³. The inputs include 80kg seed (US$144), 200kg Compound D (US$120), 200kg Gypsum (US$24) and 69 labour days. As a woman’s crop, land and labour allocation is often sub-optimal for groundnuts and rarely applied fertilizers, lime and other external inputs. Unpaid community labour reduces prospects for boosting production and productivity.

As main producers is the smallholder sector, extension services are mainly provided by AGRITEX. Private companies like REAPERS, Agriseeds and Willards Foods provide extension services to their contracted farmers. In extension services there is shortage of experienced and adequately resourced staff and demand since producers grow the crop under the notion that it is a simple non-cash crop and do not require good agronomic practices.

Currently the absence of appropriate financial services also affects middlemen who are critical in terms of bulking produce from resettlement and communal areas. Such a production-marketing context has acted to reinforce a subsistence production culture.

### 2.3 Production

As noted earlier production estimates⁴ suggest that outputs could be enough to meet local commercial demand. However, there are three points to be noted: Firstly, the groundnut varieties produced are suitable for peanut butter than confectionery requirements resulting in imports to meet their demand. Secondly, not all produced groundnuts are formally marketed - (When IRD supported groundnuts production in Buhera they encountered produce from at least two seasons that farmers kept in their granaries). Thirdly depending on the timing of a crop assessment, mid-season dry spells, pests and other production-related problems may affect eventual output.

The crop area increased during the last decade partly because of efforts in contract farming promotion by some actors in the industry such as

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2 Written input from Seed Co, October 2012,
3 Interview, Rob Kelly October 2012
4 Particularly for crop assessments these figures are based on calculations using land planted or cultivated and expected yield.
REAPERS and Agriseeds. This shows that with a ready market and supported production, smallholder farmers can take up groundnut production to a semi-commercial level. Large scale commercial farmers are not necessarily active in groundnuts production in Zimbabwe.

One reason given by some key informants is that the crop is labor intensive especially at harvesting. However, examples of experiences in other countries like Ghana show there have been growth in large scale commercial farmer activity too. This shows that large scale commercial groundnut production can be explored in Zimbabwe at least for seeds initially.

*Table 4* shows productivity levels between 0.4 and 0.6t/ha from the 1980s through the 2008/09 season compared to up to 4t/ha under irrigation (FAO 1997⁵). In the 2011/12 season, productivity dropped to 0.36t/ha (GoZ 2012) reflecting farmers’ inclination not to allocate prime land and other resources to groundnuts production. Smallholder farmers do not consider groundnuts production a commercial operation. Waddington and Karigwindi (2001⁶) corroborate this experience that smallholders find it more beneficial to continuously grow maize with fertilizer than rotate with groundnuts because of its low yields, marginal to zero profitability and high labour costs for groundnut-maize rotation.

<table>
<thead>
<tr>
<th>Season</th>
<th>1980s (Avg)</th>
<th>1990s (Avg)</th>
<th>2005/06</th>
<th>2006/07</th>
<th>2007/08</th>
<th>2008/09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Production (MT)</td>
<td>84,280</td>
<td>85,532</td>
<td>83,170</td>
<td>100,168</td>
<td>131,536</td>
<td>216,619</td>
</tr>
<tr>
<td>Percentage Change</td>
<td>---</td>
<td>1.40</td>
<td>-4.07</td>
<td>15.50</td>
<td>51.70</td>
<td>149.80</td>
</tr>
<tr>
<td>Area (ha)</td>
<td>197,888</td>
<td>174,097</td>
<td>176,196</td>
<td>224,318</td>
<td>299,252</td>
<td>354,636</td>
</tr>
<tr>
<td>Percentage Change</td>
<td>---</td>
<td>-12.0</td>
<td>103.20</td>
<td>15.30</td>
<td>53.80</td>
<td>82.30</td>
</tr>
<tr>
<td>Yield (kg/ha)</td>
<td>423</td>
<td>487</td>
<td>472</td>
<td>447</td>
<td>440</td>
<td>610</td>
</tr>
<tr>
<td>Percentage Change</td>
<td>---</td>
<td>15.10</td>
<td>-2.60</td>
<td>-7.70</td>
<td>-9.20</td>
<td>25.80</td>
</tr>
</tbody>
</table>

### Figure 2: Groundnuts production trends by land category
Source: SNV 2009

6 Productivity and profitability of maize + groundnuts rotations compared with continuous maize on smallholder farms in Zimbabwe, pp83-98 in Experimental Agriculture, Vol. 37. Issue 1

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2.3.1 Private Sector Participation in Sub-sector

The production of groundnuts in Zimbabwe has been facilitated through contract farming between the smallholder farmers and private sector players. The Grain Marketing Board (GMB) who is the major player has been contracting over 6,000 smallholder farmers with highest in the Buhera and Rushinga districts. AGRISEEDS has established 35 collection points in Gokwe and Rushinga districts for the contracted farmers.

REAPERS, IRD and PRIME SEEDS are also involved in contract farming to produce groundnuts. But contracting companies complain of side selling by the smallholder farmers, which results in the non-repayment of the inputs advanced.

Overall the production of groundnuts is constrained by production and productivity challenges, issues around farmer organization and knowledge transfer, low private sector appetite to support production due to some negative experiences and weak marketing structures.

2.3.2 Farmers’ Perspectives on Sub-sector Problems

Witnessing the private sector interest in groundnut, some farmers in Buhera and Gokwe have organized themselves with NGO support. Despite private sector interest and creation of farmer organization, the problems that farmers face are:

1. Lack of market information (buyers, prices),
2. Poor access to quality inputs,
3. Lack of appropriate technology (e.g. for shelling),
4. Lack of appropriate technical and extension services,
5. Misconception of contract inputs as grants amongst growers, and
6. Lack of direct access to financial services (high bank charges, lack of appropriate collateral).

With the near collapse of cotton in Gokwe (and possibly other cash crops in future) farmers are now willing to engage groundnuts which makes it an optional cash crop with significant export potential.

Figure 3: Leading groundnut producing areas (2011/12)
Source: AGRITEX Records, August 2012
Figure 4: Groundnut Sector Map

The Groundnut Sub-Sector Study
2.4 Buyers, Sheller and Processors

**Buyers**

The main buyers of groundnuts in Zimbabwe include the GMB, REAPERS, Agri-seeds, INTERGRAIN, AGRICOM, Predomn Investments and Peak Holdings. There is also a host of small processors and informal traders involved in the buying and resale of groundnuts. The middlemen sell to processors or to other traders at main markets like Mbare in Harare.

**Sheller**

Groundnuts are shelled either at household or factory level. At household, shelling is done either by hand or hand-operated shelling machines produced and distributed locally (e.g. Appropriate Technology Africa, ATA). At industrial level GMB and REAPERS have the largest shelling plants in Harare and Rusape. Some of the main buyers and processors also promote seed production for commercial use amongst smallholder farmers.

**Processors**

Leading small-scale processors include Chiwas and Karima Investments, Bescom Enterprises and ROTVIC. These processors purchase groundnuts from communal areas and also import from Malawi and Zambia. Some do toll-processing for informal sector actors.

In large-scale processing for peanut butter, REAPERS is the leading player with a capacity to process 500,000 tonnes a year for a peanut butter brand ‘Mama’. Lyons Maid is the second largest processor for peanut butter and is currently importing groundnuts for its operations paying up to US$1 100/t for shelled groundnuts from Malawi and Zambia.

Nutresco is the third leading processor in the country and currently imports 90% of its groundnuts requirements from Mozambique and Malawi. Nutresco pays US$900 per tonne for shelled groundnuts delivered to its factory.

The company is also involved in toll shelling and processing to use some of its under utilized capacity. The other relatively large processors in the groundnuts sub-sector are Cairns (Willards Foods), National Foods and CHARHONS. Willard worked on a model of integrated extension services for farmers through its agronomists.

The key challenges identified by the processors include:

1. **Constrained local supply** which increases cost of mobilizing produce and at times creates an unproductive stampede amongst sub-sector actors for the available produce.

2. **Farmers are not producing big nuts.**
As such, the big nuts sub-market has potential considering this is the type of produce most large scale processors demand.

3. **The isolated nature** and weak organization of farmers involved in groundnut production.

4. **Side marketing.** Groundnuts are highly susceptible to side marketing and on-farm processing, making it unattractive for contract farming.

5. **High cost of production** per unit and
processing due to lack of a guaranteed supply of groundnuts throughout the year. As a result some companies have had to close at times in the year e.g. GMB and REAPERS Shelling plants, Karima Investments etc,

6. Poor rural road network and weak information system which also pushes production costs,

7. High transaction costs per unit, and

8. Trust [& other ‘ubuntu’] deficits where farmers for instance insist on cash payments forcing large scale buyers to use Cash in Transit [CIT] services to reduce their exposure to risks. However, this increases companies’ costs and reduces their competitiveness especially given the growing number of small scale processors active in the peanut butter value chain.

However, the study’s Produce Mobilization Framework found that Grain Marketing Board is currently not playing an active role in connecting the farmers and the private sector.

This has created space for informal middlemen and formal commodity brokers who purchase groundnuts from farmers for onward selling to private companies. This leaves vulnerable farmers without any support for their production.

2.5 Wholesaling and Retailing

The wholesale of groundnuts-related products is through the fast-moving consumer goods supply/distribution chain of wholesalers and retailers (supermarkets, factory shops etc). Some peanut butter processors are finding challenges around low prices largely because of informal peanut butter processors.

2.6 Marketing

The local supply of groundnuts does not meet the requirements of local processors. Large local processors import roughly 90% of their requirements because local groundnuts supplies dry up or become uneconomic for bigger sub-sector players from about August of each year till the next harvest period.

The groundnuts sub-sector’s market channels are:

**On-Farm Market:**

In this channel volumes of groundnuts entering the market are unaccounted and is consumed raw or processed into roasted peanuts or peanut butter.

**Poor Urban Market Channel:**

This channel is serviced by retailers and supermarkets operating in the high density areas and through local small scale processors sourcing groundnuts directly from smallholder farmers of Mbare Market.

**High Income Urban Market Channel:**

This market is supplied by supermarkets and also consumes imported peanut butter.
Institutional Buyer’s Market Channel:

This channel is made up of schools, hospitals, hotels and restaurants. These institutional buyers mostly purchase directly from the processors.

The informal marketing framework has remained flexible in terms of the business model and over the years become strong in appropriate technology for shelling and peanut butter making. Actors in this market segments have become aggressive and also sophisticated with the result that formal processors have almost been pushed out.

The high income urban market segment is facing serious challenges in accessing groundnuts from the local market and also for exports. Actors supplying this segment like GMB noted significant unmet demand with orders of up to 200 tonnes/month not being supplied.

2.7 Projected Financial Returns in the Sub-sector

Table 5 below indicates financial returns from hectare of groundnuts, assuming that the farmer’s yield is 900kg per hectare.

<table>
<thead>
<tr>
<th>Minimum Producer Price</th>
<th>USD per kg</th>
<th>0.67</th>
</tr>
</thead>
<tbody>
<tr>
<td>Expected Yield</td>
<td>kg/ha</td>
<td>900.00</td>
</tr>
<tr>
<td>Producer Costs</td>
<td>USD/ha</td>
<td>404.00</td>
</tr>
<tr>
<td>Gross Return</td>
<td>USD/ha</td>
<td>540.00</td>
</tr>
<tr>
<td>Profit/Loss</td>
<td>USD/ha</td>
<td>136.00</td>
</tr>
<tr>
<td>$ Return: $ Invested</td>
<td>---</td>
<td>1.34</td>
</tr>
<tr>
<td>Break Even Yield</td>
<td>kg/ha</td>
<td>673.33</td>
</tr>
<tr>
<td>Return to Family Labour</td>
<td>USD/ha</td>
<td>1.97</td>
</tr>
</tbody>
</table>

*Table 5: Indicates financial returns from hectare of groundnuts, assuming that the farmer’s yield is 900kg per hectare*
3.1 Conclusions

The groundnuts sub-sector faces challenges regarding production and productivity (0.4t/ha against 1.2t/ha which was realized in Buhera under IRD support). This has impacted on raw material availability for the peanut butter and other value chains dependent on this subsector.

The crop however is an ideal vehicle for facilitating increase in rural incomes for women who are the main producers, micro-processors and marketers with scope for improving employment generation. At the same time, it can underpin diversification out of cotton for some farmers.

Sub-sector governance needs to be improved to reinforce increased smallholder contributions and strategic participation of large scale commercial farmers. Private sector players focusing on inputs, research, marketing, processing etc. exist although there is limited sub-sector coordination around a shared framework.

With all constraints considered, the sub-sector showed opportunities and potential for private sector supported smallholder productivity and production enhancement.

3.2 Recommendations

The study identified the following areas as critical for sub-sector development:

1. Production and productivity improvement,
2. Developing marketing structures overall and smallholder participation, i.e. producer-processor interaction, and
3. Improving the policy and business environment.

Based on the sub-sector assessment, specific recommendations for SNV interventions should focus on supporting a process of shifting smallholder production from the subsistence to commercial production.

This is because the current production orientation among the smallholder farmers is inadequate for the present subdued demand (due to economic problems) and will not underpin any industrial expansion.

So there is a compelling need to facilitate commercial production. This shift can only happen through working with model farmers and demonstrate improved livelihoods from groundnut production.

The study therefore recommends the identification of model farmers who will be coached and mentored on commercial groundnut production in terms of:
1. Access to improved seed (variety/breed)
   - **Short-term:** seed importation, which however may be expensive and that imported seed may not always be ‘true-to-type’ as well as can have issues of adaptation.
   - **Long-term:** seed multiplication working with established farmers either Small Scale Commercial Farmers (SSCF), A2 and remaining Large Scale Commercial Farmers (LSCF). This will create manageable seed production environment with smallholder level interventions assuring demand for produced seed. Also the proper selection of returned seed under proper management (agronomic practices) will boost productivity and production.

2. Ensuring access to and usage of other inputs including fertilizer
   - **Basic inputs:** improved seed, seed dressing and top dressing,
   - **Optional:** basal fertilizer,

3. Improving access to and uptake of appropriate technologies:
   - **Demonstration plots** in increasing density of producers,
   - **Ongoing capacity development** of individual farmers, extension staff and other stakeholders,
   - **Supporting provision of** “disciplined and resourced extension” that integrates state and non-state extension to reduce risks of mixed-messaging during production mentorship processes.

4. Better structuring and facilitation of marketing processes including improving subsector information and communication systems:
   - Instituting competitive buying framework (number and diversity of players),
   - Supporting improved governance of marketing processes,
   - Engaging stakeholders critical for the supply of secondary services of roads, ICT and appropriate technology e.g. farm-level shellers and produce bulking facilities.

5. Improving sub-sector coordination (i.e. actor engagement for mutual success)
   - Creation or supporting emerging collaborative framework for actors in subsector,
   - Developing and securing funding for strategic subsector initiatives (e.g. activities envisaged under recommendations 1 to 4 above),

6. Strengthening sub-sector research to anchor development and implementation of improved approaches, answering sub-sector questions (e.g. the inner workings of the informal sub-sector channels and role in a formal process of sub-sector development / growth) and developing new products,

7. Improving funding of sub-sector actors tapping into existing products (e.g. CREATE Fund and products of other banks like Agribank), and business environment development through supporting policy research, lobbying and advocacy within the structure of the collaborative framework.
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