AFRICAN UNION
INTERAFRICAN BUREAU
FOR ANIMAL RESOURCES

POLICY BRIEF

Industrialising Zimbabwe's Feed and Fodder Sector
A Strategic Pathway to Export-Led Growth

1. Executive Front Matter

Primary Decision-Makers: Ministry of Lands, Agriculture, Fisheries, Water and Rural Development (MLAFWRD), Industrial Development Corporation of Zimbabwe (IDC-Z), Ministry of Finance, and the Zimbabwe Feed and Fodder Multi-Stakeholder Platform (ZFFMSP).

Decision Required: Endorse the "Scenario 4: Industrial Scale & Export Orientation" pathway, mandate the drafting of a dedicated export-oriented White Paper, and formalise the strategic investment partnership with IDC-Z to capitalise commercial fodder production.

Key Messages (Core Diagnosis):

i) **A foundational economic driver:** The livestock sector contributes 35–38% to Zimbabwe's Agricultural GDP, yet feed and fodder account for 60–80% of total livestock production costs.

ii) **Deficits demand commercial scale:** Zimbabwe's local feed deficits cannot be solved through subsistence farming; they must be resolved through industrial-scale commercialisation driven by robust private-public partnerships.

iii) **The export opportunity:** Transitioning to export high-value fodder (such as Lucerne) to the SADC region (e.g., Botswana) and the Middle East presents a multi-billion-dollar economic opportunity that guarantees high returns on investment while simultaneously covering domestic shortfalls.

2. Executive Summary

Local challenges in Zimbabwe's feed and fodder production have been severely exacerbated by the global "Triple C" crises—COVID-19, climate change shocks, and the Russia-Ukraine conflict. These compounding crises, heavily punctuated by El Niño-induced droughts, have devastated local feed availability, costing the livestock sector an estimated USD 500 million in lost revenues over the last three years (AU-IBAR, 2024a). To secure the future of the agricultural economy, Zimbabwe must abandon the paradigm of treating fodder merely as a drought-relief mechanism. This brief advocates for the immediate adoption of "Scenario 4: Industrial Scale & Export Orientation," an ambitious strategic pathway to transition the feed and fodder sub-sector into a multi-billion-dollar, export-driven industry.

3. Introduction and Context

The livestock sector is a vital pillar of Zimbabwe's economy, accounting for 6-8% of the national GDP and contributing approximately USD 1.2 billion annually (AU-IBAR, 2024a). With a national cattle herd of approximately 6 million, alongside substantial goat and sheep populations, the demand for high-quality forage is massive. Because feeding accounts for up to 80% of production costs—particularly in dairy, where it undercuts regional competitiveness—strategic fodder production is the

ultimate determinant of livestock profitability (AU-IBAR, 2025a). However, the sector is currently trapped in a cycle of vulnerability, requiring a definitive shift toward industrialisation and specialized commodity export.

What is "Scenario 4"?
Scenario 4 (Industrial Scale and Export Orientation) is a transformational economic pathway that envisions Zimbabwe's feed and fodder sector evolving from a localized, deficit-driven system into a multi-billion-dollar, globally competitive agro-industry.

This scenario is defined by:

i) **Achieving a Structural Surplus:** Moving from chronic national shortages to a sustained 15–20% feed and fodder surplus, enabling the consistent export of specialized products (such as high-value forage, premixes, and pellets) to regional and international markets.

ii) **Advanced Industrialization:** The widespread adoption of automated manufacturing, precision nutrition technologies, and circular bio-economy approaches (such as converting feed waste into bioenergy and fertilizers).

iii) **Mega-Infrastructure & Financing:** Heavy public and private investment in strategic export corridors, rail-linked silos, bonded warehouses, and the deployment of industrial-scale finance instruments like export credit guarantees and green bonds.

iv) **Global Integration:** Harmonizing local production standards with international trade protocols, allowing large conglomerates and specialized SMEs to seamlessly supply major markets like Botswana and the Middle East.

Scenario 4 is the ultimate leap from treating fodder merely as a drought-survival tool to actively trading it as a highly formalized, export-ready commodity.

4. The Problem: Deficits, Fragmentation, and Data Gaps

Despite its "Emerging" sector status, Zimbabwe's feed and fodder value chain faces critical bottlenecks:

i) **The National Deficit:** Zimbabwe requires 6.2 million metric tons (MT) of dry matter annually but currently produces only 3.8 million MT, leaving a structural deficit of 2.4 million MT (AU-IBAR, 2024b).

ii) **Policy Subordination:** Currently, there is no specific, standalone policy that governs the development of the feed and fodder value chains; they remain implicitly subsumed under general agricultural and livestock frameworks, diluting targeted investment (AU-IBAR, 2024c).

iii) **Static Data Ecosystems:** Current data collection methods fail to capture dynamic export readiness. ZIMSTAT data largely reflects subsistence production and historical figures, lacking the real-time, spatial market intelligence required by international investors and export agents (AU-IBAR, 2025a).

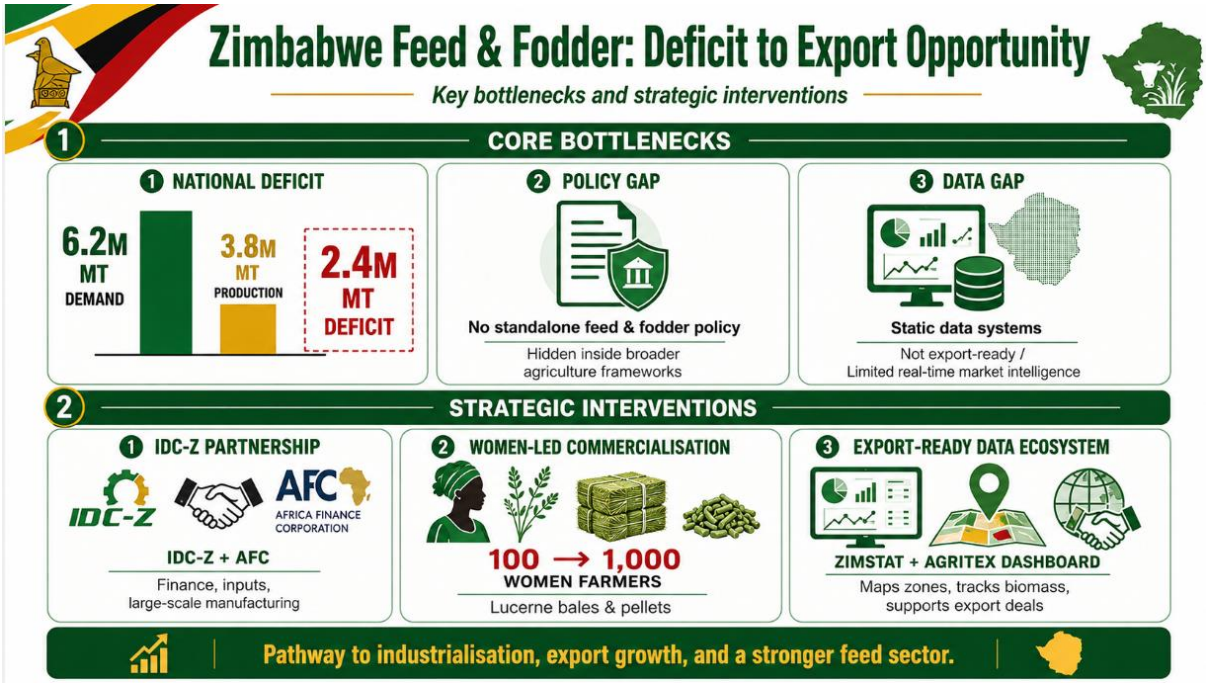


Figure 1: Zimbabwe Feed & Fodder: Deficit to Export Opportunity

5. Strategic Interventions: The Industrialisation and Export Pathway

To achieve "Scenario 4," Zimbabwe must leverage strategic interventions and high-level partnerships to drive transformational growth:

i. **The IDC-Z Partnership:** A momentous opportunity has been established to partner with the Industrial Development Corporation of Zimbabwe (IDC-Z)—part of the Mutapa investment fund group—and the Agricultural Finance Cooperation (AFC). This partnership aims to fund targeted projects and provide critical inputs (phosphates, limestone, and fertilisers) to catalyse large-scale feed manufacturing (AU-IBAR, 2024c).

ii. **Women-Led Commercialisation:** AWARFA-N Zimbabwe is spearheading a commercial Lucerne production project, scaling from an initial 100 to 1,000 women farmers. By producing high-protein Lucerne and processing it into bales and pellets, this initiative directly targets the dairy and beef sectors, as well as high-value export markets, proving that women-led enterprises can anchor industrial supply chains (AWARFA-N Zimbabwe, 2025).

iii. **Export-Ready Data Ecosystems:** Through the RAFFS Project, ZIMSTAT and AGRITEX are collaborating to deploy a centralised Feed and Fodder Dashboard. This digital infrastructure will map investment zones, track biomass availability, and provide the real-time market intelligence necessary to secure international offtake agreements (AU-IBAR, 2025a).

6. Targeted Policy Recommendations

To unlock the export-led industrialisation of the feed and fodder sector, the MLAFWRD and allied policymakers must enact the following:

1. **Draft an Export-Oriented White Paper:** Formally declare feed and fodder as an economic sector of strategic importance, entirely distinct from general livestock policies. This White Paper must explicitly outline the roadmap for regional export dominance.

2. **Operationalise the IDC-Z Partnership:** Constitutionalise a formal Steering Committee comprising MLAFWRD, IDC-Z, AWARFA-N, and ZFFMSP. This committee must be mandated to execute blended-finance Public-Private Partnerships (PPPs) for medium-to-large processing hubs (milling, pelleting, TMR plants) and export corridors.
3. **Establish Export Standards and Zoning:** Fast-track the enactment of specific fodder quality standards by temporarily housing them under a Statutory Instrument (SI) via the *Fertilizer, Farm Feeds and Remedies Act*. Furthermore, mandate Plant Quarantine Services to ensure phytosanitary compliance for Middle East and SADC markets, and designate specific land and water bodies (e.g., Matabeleland dams) as dedicated export-oriented fodder production zones.
4. **Deploy an Export-Ready Data Dashboard:** Mandate ZIMSTAT and the national Data Task Team to populate the new Feed and Fodder Dashboard with real-time, dynamic data aligned with international export requirements, moving definitively away from static, historical reporting.

7. References

AU-IBAR. (2024a). *Policy Brief: Partnership for the Industrialization of Zimbabwe's Feed and Fodder Sector*. African Union-InterAfrican Bureau for Animal Resources.

AU-IBAR. (2024b). *Unlocking the Potential of Feed and Fodder in Africa*. African Union-InterAfrican Bureau for Animal Resources.

AU-IBAR. (2024c). *Communique: Partnerships to Support Industrialisation of Feed and Fodder Investments (Harare, Zimbabwe 18-22 November 2024)*. African Union-InterAfrican Bureau for Animal Resources.

AU-IBAR. (2025a). *Concept Note: Zimbabwe Feed and Fodder Data Consolidation, Dashboard Finalization, and Policy Support Mission*. African Union-InterAfrican Bureau for Animal Resources.

AU-IBAR. (2025b). *Strategic Pathways for Zimbabwe Economic Feed and Fodder Sectors and Industries*. African Union-InterAfrican Bureau for Animal Resources.

AWARFA-N Zimbabwe. (2025). *Nourishing Livestock, Enriching Lives: AWARFA-Zimbabwe's Sustainable Fodder Initiative*. African Women in Animal Resources Farming and Agribusiness Network.