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**FACT SHEET**

**Zimbabwe**

# Zimbabwe's Feed and Fodder Sector

## Industrializing a USD 24.5 Billion Economic Engine

*By AU IBAR*

### Overview

### The Core Economic Reality:

Zimbabwe's livestock sector is a foundational pillar of the national economy, accounting for **6% to 8% of the national GDP** and **35% to 38% of the agricultural GDP**. However, this massive economic potential is severely constrained by its foundational input: feed and fodder. Feed constitutes up to **60% of total livestock production costs**—and skyrockets to between **79% and 85% of milk production costs** in the dairy sector. This exorbitant input burden renders local livestock-sourced products uncompetitive on both regional African Continental Free Trade Area (AfCFTA) and global markets.

### The Problem: The Deficit and the Climate Vulnerability

Zimbabwe is currently operating under a severe supply-demand gap. The country has an estimated annual feed demand of **6.2 million metric tonnes (MT)**, but local production stands at only **3.8 million MT**, leaving a critical **2.4 million MT structural deficit**.

This systemic vulnerability is deeply exacerbated by El Niño-induced droughts and an arduous **eight-month-long dry season**. Heavy reliance on traditional, rain-fed grazing systems and communal rangelands actively destabilises the dairy and beef industries. This shortage drives up the prices of highly nutritious livestock-sourced foods, contributing to a **26.5% child stunting rate** and trapping the sector in a cycle of climate-induced crises.

### Transitioning to an Emerging Market

Findings from recent targeted national assessments, data consolidation missions, and multi-stakeholder workshops aimed at building resilient African feed and fodder systems have accurately quantified Zimbabwe's multi-billion-dollar sub-sector:

i. **The Untapped Valuation:** Based on Tropical Livestock Units, Zimbabwe's feed and fodder sub-sector possesses an estimated potential valuation of **USD 24.5 billion**—a massive, unharnessed resource capable of driving regional SADC trade.

ii. **The Sector Score:** Unlike other assessed nations, Zimbabwe officially scored **51.5%** in recent evaluations, elevating it from "Unstructured" to the continent's first **"Emerging"** feed and fodder sector.

iii. **The Women-Led Commercialisation:** AWARFA-N Zimbabwe is spearheading a commercial **Lucerne production project** to mitigate drought losses. Initially empowering **100 women farmers**, the model is rapidly scaling to **1,000 women**, actively integrating them into the lucrative formal livestock value chain.

iv. **The Data Transformation:** Zimbabwe is transitioning from historical paper-based reporting to real-time, digital intelligence. ZIMSTAT has adopted Computer Assisted Personal Interviews (CAPI) and advanced statistical software (Stata, SAS, CSPro) to feed data directly into a dynamic National Feed and Fodder Dashboard.

### The Investment Pathway: Scenario 4 (Industrial Scale & Export Orientation)

Zimbabwe's stakeholders have actively chosen to bypass "Business as Usual" and transition the sub-sector directly into **Scenario 4: Industrial Scale and Export Orientation**.

To realise this, strategic partnerships have been formalised between the Zimbabwe Feed and Fodder Multi-Stakeholder Platform (ZFFMSP) and the **Industrial Development Corporation of Zimbabwe (IDC-Z)**. IDC-Z and its partner companies (like Chemplex) are uniquely positioned to provide critical inputs such as phosphates, limestone, and fertilisers to fund large-scale fodder hubs. This partnership aims to move beyond domestic consumption and target lucrative export markets, including Botswana, Angola, and the Middle East.

### Urgent Policy Recommendations

To fully industrialise this sector and align with the National Industrial Development Policy, the Ministry of Lands, Agriculture, Fisheries, Water and Rural Development (MLAFWRD), ZIMSTAT, and private investors must execute the following directives:

i. **Enact a Standalone Feed and Fodder Export Policy:** Formalise feed and fodder as an economic sector of strategic importance, separating it from general livestock policies. The policy must focus heavily on value addition, SADC standards certification, and export incentives.

ii. **Operationalise the National Data Dashboard:** Fast-track the integration of harmonised datasets from ZIMSTAT into a centralised, dynamic Feed and Fodder Information Management System (FFIMS). This real-time intelligence is mandatory to guide investor decisions and export market tracking.

iii. **Capitalise via Public-Private Partnerships:** Leverage institutional financiers like IDC-Z and the Agricultural Finance Corporation (AFC) to provide blended, industrial-scale finance. Funding must be directed toward processing hubs, irrigation development, and the heavy mechanisation required for baling, compressing, and pelleting fodder for export.

iv. **Promote Formal Fodder Contracting:** Build robust out-grower schemes connecting commercial fodder producers to anchor buyers (such as dairy processors, beef feedlots, and export agents). Guaranteed market off-take is required to secure commercial bank financing.

### Expected Impact

Zimbabwe will permanently eradicate its 2.4 million MT domestic deficit and protect its massive livestock assets from climate devastation through the full industrialization of its "Emerging" feed and fodder market. Ultimately, unlocking this USD 24.5 billion agro-industry will substitute costly imports and transform the nation into a highly competitive, export-driven powerhouse within the SADC region and beyond.