

Mutasa Agricultural Marketing Strategy



2018 – 2023 Strategy

Compiled by Mutasa Stakeholders

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Abbreviations

DA – District Administrator

MRDC – Mutasa Rural District Council

DAEO – District Agricultural Extension Officer

AGRITEX – Agriculture, Technical and Extension Department

FI – Farmers Intersection Company

MAF – Mutasa Auction Floor

MAMS – Mutasa Agricultural Marketing Strategy

AES – Agricultural Extension Supervisor

AEW – Agricultural Extension Worker

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10.0 Implementation Milestones / Action Plan

NB: The MAMS document is the guiding tool for agricultural marketing in Mutasa District and involves numerous stakeholders. Its documentation and implementation is a continuous process which should last for the coming decades. Adjustments will be made to suit prevailing government policies. Areas lacking complete information will be filled in throughout the process with participation from relevant stakeholders.

Executive Summary

Horticultural products, food products in particular, are products that Zimbabwe imports quite a lot of. The more we produce locally when needed the more we save, or indeed earn, in foreign currency. However, until we improve our production patterns, aggregation and logistics we are for the most time wasting our efforts. This strategy is centred on the creation of centralised transparent online markets and the orientation of all the district's market responsive production being channelled through them and the inclusion of all producers regardless of level of production.

Mutasa district is an agriculturally based economy with most of its farming communities performing way below their potential to contribute to their own and the district's wellbeing. The district principles in broad consultation with stakeholders recognise that most of the resources needed for the significant increase of the realisation of potential are already available but not being used as effectively as they should.

The biggest bottlenecks and challenges identified are access to markets and the tailoring of production to meet market requirements, lack of cohesion and integration within the district's agricultural industry and an enabling environment to promote participation and innovation by all players and value chains.

It is appreciated that effective commercial relationships stimulate farmers and business to invest their time, money and other resources in improving and upgrading their operations. Effective relationships serve ultimately to reduce costs and hence increase returns.

To achieve this means discipline and to achieve this discipline the whole district needs to act as a unit in a united way. The purpose of this strategy is to give all stakeholders the opportunity to think as if there is no box. The strategy is about changing mind sets and creating the framework for uniting efforts for a common purpose and creating the conditions for Mutasa to become the garden of Zimbabwe with sold production pumping through its veins.

The District Administrator's Remarks: Mutasa District

My hopes for the MAMS include Agricultural market infrastructure which will promote market linkages for both rural and international markets, hence promote food security, income generation and rural market linkages. Efficient market information systems, e.g. buyer prices and facilitation of spatial distribution of products from rural areas to towns between markets. Skills, new techniques and new ways of obtaining information on marketing agricultural produce. Favourable market environment conducted within a supportive policy, legal, institutional and macro-economic environment. New marketing linkages between large retailers and farmers, e.g. contract farming, group marketing and other forms of marketing.

Mr. Tendai Kapenzi 13 June 2018

The District Agricultural Extension Officer's Remarks: Agritex

The MAMS document is a very much welcome initiative in the District as we seek to improve agricultural marketing on all platforms. It is my hope that this strategy will be able to unlock Mutasa's business potentials. As a department we hope to realise a transparent marketing environment between all value chain players from the smallholder farmers, large scale farmers, buyers/of-takers, transporters and the final consumer. We are in support of creating a win-win situation for the producers and the buyers. Farmers' lives should visibly improve including nutrition and income security. In the coming years Mutasa District should become a household name in Zimbabwe and possibly the SADC region.

Mr. Forbes Mutsvikiri 5 June 2018

Vision

To be a leading and dynamic Eastern Region marketing hub for all agricultural products.

Mission

To promote Mutasa by providing a policy framework to implement an organised and sustainable market driven agricultural production in a competitive, profitable and transparent environment through linking value chain players, providing moderation and all necessary support to enable strong marketing relationships and to make the district an easy place to do business with.

Core Objectives

1. To increase the number of farmers selling their produce through formal markets by 50% from year one to year two.
2. To improve by 2023 quality and rate of produce delivered to market
3. To have by 2023 at least one farmer and buyer representative platform per month to discuss marketing issues.
4. To create by the end of 2018, institutions that facilitate easy movement of agricultural products.
5. To continually assist farmers with capacity building on quality management systems.

2. Introduction

This document is an agricultural marketing strategy of Mutasa district produced by a team of technocrats and involving broad consultation within the district. They were tasked by the Mutasa DA's office to document the potential of the district and present possible agricultural marketing strategies from what is available in order to facilitate the marketing of agricultural products of the district to the best long term advantage of the farmers and the district as a whole.

The Mutasa district principles recognise that Mutasa is well endowed with resources, but nowhere near to achieving its full potential, and want all possible interventions identified and implemented within a logical framework to improve on their sustainable use and benefits.

From discussions with stakeholders the District Principles further recognise that:

1. Many people are working hard but not getting the results they work for or deserve.
2. Mainly due to individuals and institutions being busy doing their own work in relative isolation and not seeing themselves interconnected within an organised structure, thus lacking the benefits of unity where one passes on the baton of all aspects of product supply from one to the other seamlessly where all involved add value.
3. That farmers need markets to capitalise on all that goes into making the farmer productive.
4. That fresh markets need markets of last resort such as canning factories and dehydration plants and that a central market has many advantages over the present fragmented situation, where buyers for the most part, have the attributes of hunters. The District Principles want their own 'Mbare' or 'central marketplace' as such markets attract buyers in competitive numbers.
5. The strategy must create the environment where everyone knows how they fit in and on how best to pass on the production baton from crop decision to banking the proceeds of sales.
6. The strategy is about changing the environment so that people's roles become more effective and mutually supportive and result in worthwhile farmer sales of their products.

2.0 Background information

Mutasa District is one of seven districts in the Manicaland province of Zimbabwe. Mutasa district is located 30 km from Mutare and stretches to the Honde Valley, which is about 100 km northeast of Mutare along a tarred road that branches off the Nyanga road. According to the last national census that was conducted in 2012, the district has a population of about 169 000 people.

Mutasa District's economy is agro-based, it is argued to be the most food secure district in Manicaland as it rarely experiences drought, falling within Natural Region I, IIa, IIb and III. Villagers practice semi-commercial agriculture. And the district has several plantations and estates that provide employment. Villagers raise cattle, goats and chickens. And also grow maize, groundnuts, and a variety of horticultural crops. Some of the farmers, especially in the Honde valley, grow coffee, tea and bananas as their primary crops. On the other hand large scale commercial plantations produce timber, coffee and tea.

2.1 Climatic conditions and Agricultural strengths

Mutasa District is divided into 3 main Natural Regions which are NR1, NR2a, NR2b and NR3. 11 Wards are under NR1 which are on the extreme east of the District. NR1 is characterised by rainfall which ranges from 1000mm to over 1500mm annually. The wards in Honde Valley have high temperatures and steep slopes. These Wards focus on Tea, coffee, Banana Fruit trees and Timber Plantations. Dairy farming also does well in the NR1 Wards. Sugarbeans can be grown twice or thrice in one agricultural year.

3.0 Infrastructure development

The following are some of the major infrastructure developments in Mutasa district.

3.1 Road network

The district is serviced by a network of surfaced and gravel roads. The main highways are the Mutare–Nyanga (A15) highway and the Selbourne to Honde Valley road. During the rainy season some parts of the district are inaccessible by road due to the bad state of roads. The district council does not have the capacity to maintain gravel roads. However, sometimes the local authority maintains the main gravel roads with the financial assistance from the Zimbabwe National Roads Authority (ZINARA), although in Honde Valley some areas are only accessible by four-wheel-drive enabled vehicles due to the terrain.

3.2 Telecommunication

More than 90% of the district is covered by wireless or cell phone networks, although mountainous areas especially in some parts of Honde valley have poor reception. Land telephone lines connect most of the business centres throughout the district, Villages and business centres with telecommunication services have access to the internet. Internet speed is generally a challenge.

3.3 Water resources

Mutasa district is in the Highveld, receiving high rainfall, hence there are a number of small to large dams in the district, the major ones being Osborne and Nyawamba dams. The Pungwe–Mutare pipeline also passes through the district and the district is still to benefit from water points along its route. In the Honde Valley, water is supplied from a number of small piped systems and motorised pumps serving small towns, growth points, commercial plantations, service centres and some villages, as well as direct abstractions from the rivers by villagers for irrigation and domestic use.

3.4 Health care

Most of the health care facilities in the district are owned and run by the government's Ministry of Health and Child Welfare, although local communities are involved in the management of some clinics. The main referral hospitals are Hauna Hospital and Bonda Mission Hospital. There are several poly-clinics in the district that offer primary health care to people from the villages. In recent years as the economy of Zimbabwe has declined, there has been a shortage of drugs and equipment at the hospitals although staffing levels by end of 2010 had improved. Communities also rely heavily on traditional medicines. The major diseases that affect the people of Mutasa include diarrhoea, TB, malaria and the pervasive HIV.

3.5 Education

Mutasa district has 88 primary schools and 42 secondary schools of which 9 of the schools have boarding facilities. It has several tertiary institutions which include Africa University, Bonda Hospital nursing school, and various technical vocational centres.

4.0 Mutasa Agricultural Marketing SWOT Analysis

STRENGTHS <ul style="list-style-type: none">• Farmers are hard-working and willing to engage in agriculture• Farmers are knowledgeable about agronomic practices of most crops in their areas.• There is potential to produce significantly more of most crops.• There is broad support to make the strategy work	WEAKNESSES <ul style="list-style-type: none">• Farmers are poorly organised to market their produce through formal marketing systems.• District lacks marketing infrastructure – cold chain facilities, centralised markets, constant market intelligence.• Farmers lack commercial handling knowledge for horticultural products• Production decision making processes result in over and under supply patterns for horticultural crops.
OPPORTUNITIES <ul style="list-style-type: none">• Mutasa climatic conditions are well suited for horticultural production• Fairly good infrastructure which include roads & telecommunications.• Has a University able to assist with technical information in production and marketing.• Got a diversity of extension agencies consisting of government and NGO organisations and programmes that assist in Agriculture production and marketing.• Perennial rivers and water sources.• Can improve supply patterns at little cost.• A new system of auctioning products online is available which makes the operation of district markets feasible.	THREATS <ul style="list-style-type: none">• Some roads are not easily accessible during rainy season especially in Honde valley.• Farmers have been disappointed many times and often slow to participate in programmes.

5.0 Target Groups

5.1 Farmers

Mutasa Smallholder Farmers have been trying to break into the commercial world ever since the need for money became an aspect of life. For a time the Marketing Boards were an assured market for field crops but transport was always a challenge. There have been continuous and many attempts to increase the Farmers' production to be self-sufficient and increasingly to produce a surplus for sale. These initiatives have met many challenges and fallen short due to lack of access to sustainable markets because of lack of organisation and to high transaction costs due to the small amounts of haphazardly produced products by a large group of farmers. The District now believes that it has a workable tool in the 'Mutasa Auction Floor' to bridge the missing link and help facilitate farmers to play a greater part in the national economy.

5.2 Buyers

Industry and its buyers are continually seeking for their required products. This has always been challenging but became increasingly so with the changing demographic of the farmer population with many of the large scale producers no longer there. Securing product is an expensive exercise for buyers as they have for the greater part to 'hunt down' what they need and aggregating the amounts they require is time consuming. Their lists of suppliers for one year has little overlap with their lists from the previous years. As a result many 'middlemen' are making a living buying for the markets with a sizeable proportion reportedly indulging in unethical practices such as using stretched sacks, doctored scales, hiding true market prices and offering farmers immediate cash or lose the sale pressures to ensure they have a margin, at the farmer's expense. The District believes that by organising central and transparent markets, it can create the environment where both farmers and buyers meet and where the laws of supply and demand will freely operate and all will participate where fairness is more institutionalised.

5.3 Transporters

Transporters are always looking for business and while they have cracked the transport of people in the rural areas they have not managed to do so when it comes to the transport of product outputs and inputs. This is due to the fragmented and dysfunctional participation in the markets by the farmers and the low and uncoordinated volumes of product that require transportation resulting in sub-economic quantities for the transporters to operate. Once production becomes more of a product flow through central markets the situation is created for transporters to be readily available and even queue for business as they presently do on the streets of Mutare.

5.4 Extensionists

Extension agents have been working for years training farmers in all aspects of crop production but have been notably weak when it comes to marketing aspects and preparing farmers to feed into markets. Many attempts have been made however but usually waver once the programme is over and key personnel are no longer part of the picture. Contract farming has been seen as

a solution tool. However it can work better for some crops than others. Sooner or later, contracting agents crack historically when the value chain comes under pressure, usually from other buyers tempting farmers and farmers taking a short term view. Extension needs to incorporate the farmer and market requirements much more in their advice and to have farmers look on their enterprises more as family businesses than here-to-fore. It will require a small change in approach resulting in a big change in outcome given the new market environment this strategy will unfold.

5.5 Other Government Departments

All government departments need to present their areas of responsibilities in such a way so as to be seen to be supportive of long term viable production for the good of all. The Ministry of Education had such an approach in the eighties when they promoted 'Education with Production'. For some departments this may mean they need to tweak how they implement their areas of responsibilities and to adjust their approach where necessary to appear less authoritative and more cooperative and supportive.

6.0 Mutasa Agricultural Industry Analysis

As mentioned in the background section Mutasa district is agricultural based and is less stressed, as a district, by droughts than most others in the country, but there are areas that experience stress with the Honde valley being the district's saving grace. The potential for increased production in Mutasa is significant if all resources are tapped and brought together and connected logically. Markets have been identified as the weakest link for some time but gaining market access alone will not change much.

With the solving of access to markets all the other aspects required come into focus. Production patterns have to adjust to match with what the markets want and when they want it. Handling facilities and storage need to be constructed to handle the product flow with special attention paid to cold storage facilities. Transport solutions to cope with poor roads, especially in the wet season need to be developed. Information and communication management systems also need to be developed as well as organisational structures so that value chain players have appropriate platforms in which to bring issues for discussion, identify solutions and create the environment to implement them. In short, the agricultural industry players of Mutasa have to organise so they can work together for mutual benefit while still maintaining their independence in an inter-dependent industry. The mind-sets need to adjust and appreciate this.

7.0 Mutasa Competitive Analysis and Advantage

Mutasa has unique environments and a much more favourable water supply compared to most other districts of the country. The road network has problems but the main arterial roads are paved except for a link from Hauna back to Odzani and then to Watsomba. The bananas of the district have a quality of taste second to none which could possibly be maintained even if production per unit area were to be tripled.

Mutasa while not close to Harare or Bulawayo is already a substantial supplier of products to those markets. By creating a market of its own and causing those buyers to come to it transport will be rationalised, less time will be wasted and will reduce quality loss and shrinkage. By farmers specialising, adjusting to supply over the full production window for each crop and having access to a transparent market the district is well placed to become the garden of Zimbabwe.

All that is missing is the reorganisation of the industry which this strategy once implemented can rectify.

8 Proposed key strategic plans

Positioning to Facilitate Export Markets

All of the following plans and promotion of synergies will help create the condition for Mutasa products to be attractive to exporters and not just the local markets.

8.1 Branding

Those charged with implementing the MAMS will facilitate in what ways are available to them the overseeing of practical branding of the district and its products such that the brands have integrity and promote the district.

There are many types of brands which can be promoted by various players but all must have standards they adhere to which can be monitored to maintain their integrity within the strategy and the district. Any one or organisation that proposes to institute a brand within the district and this strategy should not only register their brand in the usual ways but also register them with the MRDC as part of working within this strategy.

It is proposed that the district can appoint members of the MRDC, Local Government, Agritex, NGO community, private business and any other it believes have relevance to form an entity to recognise the brand, agree on the parameters and how it is to be monitored and maintained.

An obvious positive of Mutasa that can be branded is the flavour of Honde bananas but there are other aspects which could also become brands. This strategy proposes the following be branded:

1. Honde bananas so that the markets start to seek them for their flavour.
2. Ease of doing business with the district.
 - a. Consistent product flow.
 - b. Responsiveness to market requirements.
 - c. Ease of dealing with the MRDC who can decide on how it makes money from business and then in turn make it easy for business to make money.
3. Organic products produced by women and youths.
4. Transparent markets.

8.2 Cold Storage

‘Shrinkage’ is an accepted phenomenon in the horticultural value chain but there are limits and as much as possible needs to be done to minimise it. Shrinkage occurs in both weight and quality as soon as the crop is harvested, even if harvested at the appropriate stage of maturity for that crop. In the short term keeping products in the shade, damp, careful handling and quick transport to market all help but the need for the provision of cold storage facilities cannot be circumvented, especially if one wants to export to distant parts of the country or beyond.

The provision of cold storage facilities has to be an integral part of the MAMS as it will afford buyers increased security in quality and help in the aggregation process by evening out product flow and rationalise logistics helping ensure trucks are filled and so possibly lowering transport costs even after storage costs are accounted for. The provision of creating cold storage facilities in Hauna is of strategic importance as it will be in close proximity to the central market and can take advantage of a more assured electricity supply from the local hydro-electric scheme.

8.3 Communication, Information Management and Access

Farmers are usually the least informed as to what is going on in the industry even though they ‘are the grass the rest graze and live on’. Technology has changed and information has become cheaper, more available but at times confusing. There have been a number of SMS based initiatives in recent years and time will select those that are relevant. Maintenance of such platforms is what often decides whether they survive or not. WhatsApp is also a useful platform which works well in certain situations but the gleaning of relevant information can be a challenge due to the quantity of other information it is wrapped in.

Once the Mutasa Auction Floor (MAF) website comes into use and auctions are conducted through it market reports will be generated and posted on the website which will make it easy for industry to track and monitor individual crop prices over time and for specific locations. This information will be a by-product of the auctions and therefore sustainable.

There is a need to incorporate a module in producer training lessons on how to access, sift and evaluate available information so farmers can make best use of what is available. Old fashioned farmers meetings and commodity organisations are still as relevant as they always were and platforms for issues to come to and channels for them to pass through must be built or rebuilt. Once markets are more structured these associations will become revitalised and more effective.

Associations and channels of communication are the conduits for challenges to come to the fore and be dealt with and for innovations to be identified and promoted. It is best not to rely on one channel of communication but to integrate all channels as much as is possible. Farmers, like other industries have, must accept that it pays them to invest in communications so they are up to date on what is going on in their industry and appreciate that knowledge is powerful.

8.4 Community Aggregation Depots

In order to feed products to the central markets there are needs as stated for support networks such as cold storage and transport systems to ensure products remain in optimum condition. In support of these there is also a need for community storage facilities even if initially they are

simple pole and thatch structures. These structures can be used for the bulking, weighing and grading of products in all weathers for the benefit of both the products and the people.

In areas where transport is difficult these structures can be erected by communities where regular transport can have access but they can be supplied by a two wheel tractor system. These public structures should be built to an approved design and communities can pay for them based on a sales levy of the community or some other such mechanism.

8.5 Contract Farming

Contract farming is a marketing and procurement tool that has been in existence for a very long time. It can work better for some crops more so than others favouring those crops with a longer shelf life. Sooner or later, within the Zimbabwean cultural context, they historically crack when the value chain comes under pressure, usually in times of scarcity as a result of competing buyers tempting farmers and farmers taking a short term view with both contracting parties ending up losing.

In the long term, with the advent of the online central market it would benefit both farmers and buyers if there was an established loan scheme that had repayments based primarily on a percentage of sales. This would significantly reduce the cost and risk of operating contracts for the buyers and would leave the farmer with more independence but at a bit more risk. However if buyers were to give undertakings that they would 'bid' for stated amounts of product at certain times of the year this would still encourage farmers to produce those crops ensuring a supply for the buyer and a market for the producer. However, this would take a coordinated effort on the part of the extensionists, funding people, farmers and buyers.

Regardless, contract farming will continue to be a feature of the agricultural marketing scene. The integrity of contracts can be greatly improved if there were a number of model contracts and the option of those entering into them being able to register their contract with an arbitration board who would give a ruling in times of dispute. Each party can build up a credit rating with the Board and in time this will let both groups know who is honourable and who is a risk. It also improves the transparency of contracts and improves the confidence in them.

Contract farming in conjunction with a registration cum arbitration board would sharpen this marketing tool.

8.6 Extension Focus

Extension used to focus on food security but has been shifting and needs to transform to a more business orientated undertaking. This is being made easier by the increasing flow of information and the reducing cost of that information. Now it is so much easier to tailor production to what the markets require. Farmers need to organise into groups and not just to consume information as to how to grow crops but also on what crops to grow, when to grow and for who to grow and the cost of doing so. Zoning of such information and extension effort to support particular crops could assist in the production of viable amounts over production windows in strategic locations.

Extension needs to help farmers and land owners recognise that their 'small holdings' are not useless and without opportunity. They must be educated to realise and appreciate that their farms and communities are valuable assets which have been hiding in plain sight for far too long.

By treating farming as a family business women and youths will be given more appropriate attention and not treated in isolation.

Different extension agents have diverse and unique approaches and areas of focus. While all of this can and should be accommodated there needs to be basic principles to eliminate possible conflict or confusion. The strategy proposes that the following be a common approach to all extension efforts:

- a. That farmers first identify a market.
- b. Set themselves a target yield to produce.
- c. Know exactly from what area they intend to produce the target yield.
- d. Work to a plan on how much of each input to use to achieve the target yield.
- e. Have a work plan of what to do by what stage.
- f. Use the full planting window to even out product supply flow and reduce risk.
- g. Encourage farmers to become expert on a limited range of crops and be professional with them.

Extension officers are often perceived as academic and not hands on and not having 'a stake' in the farmers' efforts. Incentive schemes could be permitted between farmers and extension officers allowing officers to earn rewards if they manage to lift farmer group performances by agreed amounts. These initiatives will need to follow an accepted format and be registered to avoid abuse and conflict of interests. They can form simple agreements where a work plan is agreed with a group outlining the targets and duties of both parties.

Using the above approach, there is room for a big increase in production per unit area, where farmers should end up spending more time harvesting than weeding, which has not been the reality all too often up to now.

Within the strategy, extension personnel need to promote and facilitate farmer access and understanding of the market information available and then link farm activities and farmers in a two way conversation between them and the markets. Extension personnel need to be incorporated into a network to broadcast messages from the markets of what is wanted and when and also gather information from the farmers of what is available and when and get this information back to the markets thus bridging the information flow gap that has existed up to now.

8.7 Forestry

Mutasa is well endowed with commercial forests of pine, wattle and increasingly gum tree plantations. It is a competitive industry but like the other aspects of agriculture suffers from market fragmentation. Many entrepreneurs try to break into the business of sawmilling and come 'unstuck' but try and try again. In the business it is said that for those in the value chain to make money 'one' has not to be paid.

Buyers send Lorries in to collect loads they have bought only to find that the load is not yet cut due to challenges on the miller's part from break downs or power cuts to straight lying. This

reduces the buyer's margin and then the miller's as it forces the buyers to lower their prices and thus further negatively impacts the industry.

A central timber market in Mutasa could go a long way to remedying this for both Mutasa and neighbouring Nyanga district. Such a strategy would involve the construction of roofed storage for millers to offload and have their timber graded and put into sale lots which again can be sold using the Mutasa Auction Floor electronic platform. The district council could facilitate such a market by turning DC Mutasa into a forest industry hub by, in the first place, renting water and electricity serviced sites to millers. The council could also enter into smart partnerships whereby all saw mill waste is collected and processed into saleable products and not burned or buried as is the situation for the most part up to now with its adherent environmental impact.

Millers can deliver locally over the week for the weekly auction, have their timber graded to SAZ standards and then offer it for sale to the whole pool of industry buyers who can purchase lots until they have a full truck load and then send transport in full confidence that it is of a given standard and is actually on site to be collected from a site where trucks won't bog down in any weather.

8.8 Fostering of Innovation

Innovations are solutions which come forward to deal with challenges be they physical or organisational. Associations of all types bring people with similar interests together to discuss issues pertaining to their endeavours and to identify and overcome challenges.

One of the core objectives of the MAMS is that there is at least one platform to bring industry players together each month to discuss what is of relevance. This is the ideal place to bring identified challenges to and to prioritise and set up working groups to deal with them.

For such platforms to be sustainable the participation of delegates should be funded by those they represent and not facilitated or paid for by those who are external. People must learn to invest in their own development and take responsibility for it.

The WhatsApp group used in the development of this strategy could be used to monitor its performance and also be the platform where challenges are reported and working groups and 'Think Tanks' set up to find resolutions. It is an ideal platform to promote idea generation and include a broad cross-section of experience and opinions. On such platforms as everywhere else, a culture and attitude of helping develop solutions needs to be inculcated and criticism to have a positive orientation.

8.9 Horticultural Processing Plant

Canners are seen as 'markets of last resort' and should not be condemned, but appreciated for it. They are often resented and seen as taking advantage because of the prices they offer. It is not widely understood that the market they operate in is international and the prices are set internationally and are usually stable in US dollar terms at between 10 – 13c per kilo of product being bought. While prices are perceived as low, they are viable for serious/efficient farmers and the upside is that canners can absorb volumes in times of oversupply. Canners have a crucial strategic role to play in the MAMS.

With horticulture even the best quality producers will have possibly 30% of their production not suitable for the fresh market but still of an acceptable quality for Cannerys. It should be remembered however that Cannerys are not a dumping ground often requiring very good quality product. That said, instead of allowing this product (food) to rot it should be sold at the going rate and the revenue accrued could possibly cover the costs of production of the next crop. It also creates local jobs.

Cannerys and auction floors make the perfect synergy as one is the market of last resort and the other brings the product to it and gives 'unsold' product a market. Farmers must appreciate that neither the high price nor the low price is the real price of their product. The real price they get is the average price of everything that they've sold.

Therefore there is a strategic advantage to siting an auction floor and a canning/drying factory next to each other and by channelling the product first through the auction floor will bring about the best price and product sourcing outcome for the farmer, the canner, the auction floor and the fresh market buyer.

The district is already in the process of setting up a horticultural processing plant with the funding secured and other issues being addressed.

8.10 Informal Buyers

Informal buyers have become a dominant and important market for farmers over the years. Many good and not so good relationships have been developed over time but the overview of the relationships is generally perceived as that of a predator and its prey.

Informal buyers like any other group come in all shapes and sizes. They buy according to their financial capacity and the weaker they are financially the more likely to be less ethical. Margins can be tight and indulging in practices such as using stretched bags, doctoring of scales, immediate cash now inducements and the fear of losing a sale can cause farmers to let their crops go at sub-market prices. Some formal buyers use agents to buy for them with some agents reportedly improving their personal margins by behaving in ways some informal buyers reportedly behave.

Farmers having access to a transparent central district market will go a long way in improving the farmers' situation and ability to push back. They would have another marketing option, access to the current real market prices, known true weights when selling, increased pool of buyers. The informal buyers can also participate in these markets and spend less time locating product and haggling over prices. Time saved reduces their transaction cost and even if they have been less than ethical the saving efficiency will reduce the gap in their margin reduction.

Such buyers will resist participation in a central market and will continue to 'hunt' supplies. The field can be tilted back more to level if there was a register maintained by the district which recorded the names, identification and other contact details of the informal buyers, goods sought, unit price paid and unit measure used. This register could be maintained in the first place by the traditional leadership and or the ZFU cell who would alert their communities of unethical buyers according to an agreed protocol. It might be hard to get true answers of the

quantities being sold with this system as both parties may not want others, especially the authorities, to know what their gross income is.

8.11 Livestock

Mutasa is not primarily a livestock area but it is still an important component of the district's agricultural base. Livestock have been traditionally important as security and a measure of wealth as well as for draft power. The traditional role of livestock has been undergoing change over time with their role as draft power being eroded which is likely to be further eroded among smallholders with the increasing availability of small and two wheel tractors. As 'Farming as a Family Business' becomes more ingrained which it will, out of necessity, as smallholders become more part of the market economy livestock will be increasingly viewed from a more commercial aspect.

With the anticipated increase in crop production be it in output and to a lesser extent area small stock should become a greater feature as they can consume crop residues and give back fertility as well as increased income to the farm. Again, marketing of livestock has been problematic with isolation from the markets and middlemen taking their own as well as the farmers' margin in the enterprise.

Service abattoirs especially for goats, sheep, poultry, rabbits and possibly fish could be established at major growth points that would kill and cold store on a cost recovery plus a margin for the surrounding communities. Farmers can register their livestock with these facilities and the veterinary department ensure traceability and good farm welfare practices. The farmers could market their animals from the cold store via the central auctions using the MAF platform.

This strategy would ensure animals are humanely treated, hygienically processed to market standards, aggregate production for sales to buyers and better secure prices that reflect the true market prices due to an increased buyer pool as a result of easier access and facilitate the incorporation of smallholder producers into export opportunities.

Dairying has traditionally been an enterprise of the large scale farmers but there are increasing attempts to promote it among smallholder farmers also. Viability is an issue, some of it again is structural, with the processors effectively running an informal cartel. There is a possibility that needs investigation, whereby milk collection depots auction their milk to the processors, so they become more competitive and the better ones get the supplies they require. This thinking with the market could go a long way in energising milk production and broadening its base. Presently Zimbabwe is producing about 60 million litres of milk but requiring up to 130 million litres annually which is equivalent to a shortfall of 13,000 cows. This shortfall is being met for the most part by the importation of milk powder which is blended with the national production.

8.12 Mutasa Auction Floor (MAF)

The principle of an auction floor is to bring sellers and their wares together with buyers and their wants and to let supply and demand decide the price. Generally the bigger the auction in terms of product and buyers the more stable and honest the prices realised.

Auction floors in rural or district settings have never become a feature of Zimbabwean agricultural markets for a number of reasons:

1. Too far from town buyers resulting in high procurement costs due to the cost of making personnel and vehicles available.
2. Supply too erratic and may result in wasted buyer trips.
3. Quality of product too variable.
4. Buyers preferring to play safe and wait for the farmers to come to them so the farmers can do the running around and absorb the resulting costs of doing so.

With the changes in technology and improvements in communications it is now feasible to aggregate products at an auction floor but conducting the auction online where the buyer does not need to be present physically. This reduces the cost of procurement significantly for the buyer once they are assured of product quality and delivery. Such a district auction is similar to bringing an 'Mbare Market' to the district as against the district going to Mbare which reduces the cost of marketing to the farmers.

To establish such a market and attract buyers there needs to be a constant supply of a range of products even if the range is limited at first. This can be brought about by farmers first concentrating on products wanted by the Horticultural Processing Plant and planting in excess of their needs to bait the fresh market. As the fresh market gains confidence and increases their purchases so too does the volume of product not up to fresh market standard but still within the standards of the canners.

Such a market place helps to aggregate and channel the district's production so that it is offered to all buyers in open and fair competition and links to a market of last resort in a strategic and symbiotic relationship. These two entities and their relationship are central to the MAMS and are recognised as the missing link of previous initiatives to improve the farmers and the district incomes.

8.13 Producer Production Patterns

Field crops are generally seasonal and can be stored for some time. Other crops, especially horticultural, have a more limited shelf life and must move quickly. An all too common pattern is that producers tend to 'run with the crowd' and therefore get in each other's way and ruin their crop viability by creating supply gluts with little available in between them. Too many farmers have become gamblers jumping from one crop to another without understanding how the market works and paying the price.

In order to get around this problem individual producers need to specialise in a limited range of crops and build up their expertise in them and stop trying to play the market. Generally there is more money to be made by specialising in a few crops and doing them properly and producing over the full cropping window than there is in hopping between crops and all or nothing gambling.

Extensionists need to tweak their approaches and recognise that markets are not an 'add-on' as suggested by the common term in use 'market-linkages' but an integral part of the value chain, no more, no less, important than any other link in the agricultural scenario. Producers

must spread their production over the full cropping window, not invest everything in one planting, which will help reduce gluts and busts intensity and frequency.

8.14 Risk Management

Due to the shortage of money most buyers seek and or insist on credit from their suppliers as do their off-takers. Perhaps Off-takers do so from a position of power, it is inflicted on the others. Producers are regularly 'burned' by buyers disappearing with their products.

While giving buyers products on credit has justifications it is grossly unfair that the producer must also carry the risk of non-payment. Developing a credit system for buyers has remained elusive as many just don't have the necessary security to meet the requirements of banks. The cost of money can also be so high as to make it unaffordable where margins are tight.

Buyer credit insurance is now seen as a solution to get around this. Whereby farmers sell their products and get paid after a number of weeks but take out insurance against default of payment by the buyers. To reduce the administration costs such an insurance scheme can be operated by the central market and be an in-built component of how it operates. District experiences of the past see the operation of such a scheme as imperative.

8.15 Rural Goods Transport

Market forces have to a great extent provided a people transport system within the district but this has not happened to anything near the same degree for the transportation of products or inputs due to the fragmentation of production components and in some areas the poor quality of roads compounding the situation.

Channelling of production to a central market would segment product transport into two or three segments and make it easier to bring about a transport system integrated into the bigger picture. The creation of a centralised market would act as a transport hub where the larger long distance transports could congregate while remaining on all weather paved roads. Smaller, more robust transports could collect from outlying community aggregation depots and get products to the markets while two wheel tractors and trailers can collect products direct from orchards, gardens and homesteads to the community aggregation centres. Such a system could eventually have transporters queuing in a similar fashion to people taxi ranks.

The new components of this system in the district context would be the incorporation of the two-wheel tractor units and the use of bulk bins so that bins are handled more and crops less. A loan scheme to help set up goods transport entrepreneurs needs to be instituted and the auction floor could pay such transporters on behalf of the farmers for services rendered to ensure order and stability in such an enterprise. Such a service would add value to the more distant and often cut-off communities. The same tractor units can also cultivate gardens/fields for farmers on an hourly/fuel usage/area unit rate.

Such a transport network would speed up the whole transportation of crops, reduce shrinkage and quality losses and facilitate the movement of products to more of a military style operation. This in turn would make it easier for the district's products to become eligible for the more distant or export markets all other aspects being equal.

8.16 Sales via Scales

It is a generally held belief that cheating of producers is rife by the more informal buyers but even the formal sometimes participate unknowingly because of staff/agent 'games'. Producers often cannot make fair buyer price comparisons because of the varying measurement standards (or lack of) in use. New varieties of cabbage coming on the market which are twice the weight of older varieties are doubling producer transport costs but the price per head is not adjusting proportionally.

Essentially! Buyers need to be helped to be more honest for fairness and transparency reasons and would benefit if all sales were made via scales. It happens in other parts of the world and can happen here as scale technology has gotten much cheaper in recent years. Sales via scales should be incorporated within extension messages and the use of scales should be investigated as a prerequisite for the issuance of vendor licences.

8.17 Savings and Credit

Credit tends to be expensive one way or another be it either in terms of time and or financial. Government keeps coming up with loan and other schemes to stimulate production requiring farmers to attend numerous meetings to get their share and not lose out. It is a system historically permeated with leakages and patronage as such schemes are not run along strong commercial lines. The latest Command Agriculture scheme being one of the best run schemes.

While there are numerous banks operating in Zimbabwe their products are not in sync for the most part with the requirements of agriculture. Agriculture has requirements for extended grace periods before farmer repayments are due and the push for the old Agricultural Finance Corporation (AFC) format to be rusticated is also a result of this need.

Savings clubs, ISALS, SACCOs, micro-finance and regular banks are all attempting to tap into the smallholder market and all trying to get around the lack of security to varying degrees with group strategies and putting more emphasis on repayment capacity. All working to some degree in an imperfect market environment but could work much better if the markets were working better. It would put greater stability into the equations.

Farmers are most often perceived as requiring capital as against being a source of it with emphasis of securing capital from banking institutions or government. ISALS and savings clubs do look at farmers as sources of capital and these models need further scrutiny and innovation.

The MAF platform software is capable of handling many small transactions efficiently and transparently and is a tool the farmers can start using as soon as they are marketing through it, for once farmers are making an income, the ground is set for them to save and invest.

If there is a project farmers wish to finance be it private or public they can allocate a percentage of their sales to a fund. While paying into this fund they could be buying shares in the project funded and either trade those shares within the regulations later or the project buy them back at a predetermined premium.

For security and transparency reasons such initiatives must be safeguarded. The Auction Floor would be the private sector aggregation component, the project could be anything the farmer or farmers want and the District could have oversight and the authority to ensure that the Auction Floor and other partners are handling the money as agreed. This way several entities are actively monitoring and transparency ensured and a new development tool put into operation.

Likewise, farmers can save or earn credits to participate in training and management programmes based on whatever criteria is agreed by the participating parties, be they financial or quantity or quality of product sold. Options are only limited by imagination.

Loan repayments through such a centralised market system also increases the security of repayments, as would making repayments a percentage of borrower sales increase flexibility and further ensure that farmers would not default on payments. Lump sum repayments can lead to farmer side marketing when such amounts leave them with little or nothing in times of stress. Selling through such a centralised market also help farmers develop a credit rating when it comes to borrowing from institutions.

8.18 Standards

Standards of product being presented to the markets are too variable but improving. Extension efforts over the past years have highlighted the importance and appreciation of the need for quality and the adherence to standards. However there are as many standards as there are buyers operating. Producers often cannot make fair buyer price comparisons because of the varying measurement standards, or lack of, in use. Buyers need quality standards to be consistently adhered to and always insist, with exceptions for relatively few suppliers, that samples be first brought to them before they will give any undertaking to enter into a deal. This increases the farmer's cost of marketing as it involves an extra trip on the farmer's part to do so.

Quality and standardization criteria are critical, there are tools developed for organisational and product standards and there is a need to continue capacity building in the two standardisation processes. The Mutasa Auction Floor applied to the Standards Association of Zimbabwe (SAZ) for eighteen crop standards in 2016 but it takes about eighteen months for a standard to be researched, coordinated within the region and approved. The first standard for tomatoes is at an advanced stage. Bananas are the second priority.

The strategy is that all products passing through the district's central market be graded for the market and to the SAZ standards as they come into being. This will ensure uniformity of the grading and the grading being consistent with the same standard for the region. Much of the grading will need to be done 'on farm' by the farmer with the central market for the most part policing, checking and enforcing the standards.

8.19 Storage and Post-Harvest Losses

Post-harvest losses can be significant and is an age old problem for which many solutions have been developed over time. With all the other problems and lack of cohesion in the overall district agricultural sector and lack of specialisation by farmers the management of such losses has not received the attention it should within production systems.

Their needs to be a broad consultation with producers on what would help them reduce pre and post-harvest losses and where possible demonstration sites or farm visits to show off appropriate storage systems and techniques demonstrated. Quicker sales, central (Warehouse Receipt System) storage, on farm storage, varieties, production pattern spread are all strategies that need to be looked at in unison when developing solutions.

8.20 Value Addition

The desire and need for value addition is much talked about with a lot more said than done about it which suggests that there are challenges that industry and innovators have difficulties overcoming. Therefore for innovation to happen these challenges must be identified and addressed. Zimbabwe has produced agricultural products in abundance in the past and has a relatively educated available workforce so what is missing?

For industry to be able to consider value addition of agricultural products it must have consistent access to supply both direct from the farmer and from storage. As already highlighted production patterns seldom match market requirements with the present glut and bust production patterns. Resolving this along with timely delivery and quality will help processors and exporters to solve some of their problems and to function properly.

Electricity supply, labour law, stable investment environment such as security of investment, clear and quick regulation procedures and positive attitude to business by government along with access to affordable credit are all issues which need attention at national level more so than district in the first instance. However, the district administration must do what it can with what it has to create such an environment while lobbying at the national level for desired business environment changes.

Still, the district should start with what it can change and is doing so as highlighted by the hydro-electric plant servicing Hauna, the Horticultural Processing Plant which is about to be built, the opening of a border post to Mozambique which will give cheaper access to that market, the establishment of centralised district markets via the Mutasa Auction Floors which is ongoing, the formulation of district strategies such as this strategy and so on, all add value. The proposed upgrading of the Grand Reef Airport will also open up new opportunities.

Facilities to grade crops such as sugar beans, peas, onions and their storage would also assist and add value to the raw agricultural materials to be exported out of the district in the first place while conditions and facilities to attract investors are put in place.

The priority for the district administration should be to continue in its search for smart partnerships, where in broad consultation with value chain players, it does what it can to create the conditions for entrepreneurs to open up businesses. To then support these businesses as best it can and reap the benefits of increased farmer and off farm employment and the resultant economic activity.

8.21 Women and Youth

These two groups have been receiving much attention for years as they have been identified as not getting equal treatment within the family unit. When focussing on particular groups there is always the danger of replacing one imbalance with another unless there are objective criteria set as the targets. Much work has been done especially in the legal areas, and much remains, as well as in the implementation of the solutions designed. It is a huge subject but it must not be forgotten that the family is a unit and all members of it valuable.

It has been identified that it is important for the development of smallholder agriculture that farming is treated as a business by the farmers. Smallholder farming is not just a business, it is a family business. Therefore when working with smallholder farmers all interventions and extension efforts should reflect this and promote farming as a family business taking into account the contribution of all members and giving all members of the family a say in the business. All cultures have developed management structures to deal with the challenges of their environments but cultures tend to be reactive rather than proactive. A culture of proactiveness needs to be cultivated and at the same time appreciating that equality does not always equate to sameness.

With the development of consistent access to markets and the opening of new markets whole new areas of opportunity will open up. Families have to decide how they will work together for mutual good and rewards and structural impediments removed where possible. Any family member should be eligible for access to the centralised markets and credit facilities and the right to participation in decision making processes all things being equal.

9 Mutasa Agricultural Marketing Strategy Resources Team and Areas of Focus

9.1 Agritex

– food security, Market driven agricultural production, Farming as a Family Business, technical extension.

9.2 Banking Institutions

9.3 CADS

–

9.4 Churches

– promote ethics

9.5 DAPP

–

9.6 DOMCCP

-

9.7 Environment Management Agency

– promotion of sustainable resource use and education.

9.8 Farmers' Intersection-Mutasa Auction Floor – the provision of a centralised market place to bring buyers and products to the one space in a competitive transparent environment and to facilitate the flow of market information to promote market responsive agricultural production.

9.9 GIZ

–

9.10 Inspire

9.11 Ministry of Education

– to equip the community

9.12 Ministry of Health

-

9.13 Ministry of Local Government

– creation of business environment, protection of the weak, lobbying for appropriate structural changes.

9.14 Mutasa Rural District Council

- Facilitate development, Make it easy to do business. One stop shop for permits etc....

9.15 Traditional Leadership

-

9.16 Farmers Unions

– channelling farmers challenges issues to appropriate authorities and structures for consultation and resolution initiatives, farmer education, conflict resolution.

9.17 Veterinary Services

-

9.18 Water Resources

9.19 Zimbabwe Farmers Union

-

10.0 Implementation Milestones / Action Plan

Strategy	Required	Action Agent	Action & When
8.1 Branding	To recognise the brand, agree on the parameters and how it is to be monitored and maintained.	MRDC, Agritex, NGOs, Business, Farmers, SME.	Set up a working group on branding within 3 months of adoption of strategy.
8.2 Cold Storage	Construct facilities in Hauna to support the Central Auction and HPP.	MRDC, Business, NGOs, EH Hydro.	Commodity Associations to look into after association formation 2020
8.3 Communication, Information Management and Access	<ol style="list-style-type: none"> 1. Incorporate a training module into farmer extension lessons on importance of two-way market information flow between buyers and farmers. 2. Re-energising and creation of platforms to resolve industry challenges. 	Farmers, Agritex, MRDC, NGOs, Business, ZFU, Women's Affairs.	<ol style="list-style-type: none"> 1. By June 2018 each village in the district to be represented in an AEW WhatsApp group. 2. On adoption of the strategy to re-focus WhatsApp chat group 'Mutasa Marketing Strategy' to be a strategy monitoring group tasked to identify challenges and put forward motions for the formation and approval of task

			groups and their TORs.
8.4 Community Aggregation Depots	Construct bulking, weighing and grading structures on all weather accessible sites.	MRDC, Farmers, Business, Agritex, ZFU.	Initiate conversations with communities on their viability and merits once the central market is functioning. Early 2019
8.5 Contract Farming	1. Model contracts. 2. Arbitration board. 3. Repayments as a percentage of sales.	Agritex, NGOs, MRDC, Farmers, ZFU, Business.	Set up task group to deal with the issue on the formation of commodity associations. Mid 2019.
8.6 Extension Focus	1. Tailor production to market requirements. 2. Educate farmers that farms are valuable assets. 3. Treat farms as family businesses. 4. Permit extension agents to earn rewards on target achievements.	1. All extension agents, Farmers, Businesses. 2. As above. 3. As above. 4. As above but to also include the PSC and NGO administrations.	1. Facilitate two way flow of market information between buyers and farmers. Investigate the zoning of apex areas for particular crops. June 2018 2. Cross cutting. 3. Cross cutting. 4. Set up a task group to see if feasible, resolve conflicts of principle within PSC & NGO regulations. July 2018
8.7 Forestry	1. Creation of a roofed central timber market. 2. All timber to be graded.	MRDC, Business, Millers, FITC, Forestry Commission.	Set up a working group to discuss logistics. September 2018.
8.8 Fostering of Innovation	District platforms to identify challenges prioritise and develop solutions.	MRDC, Agritex, Farmers, Business. Mins of SME.	Initiate conversation on Chat Group to start process. September 2018
8.9 Horticultural Processing Plants	Construction in conjunction with provision for an auction floor in Hauna. Organise supply of product.	MRDC, Mins of Womens' Affairs, Business, Farmers.	Initiate farmer plantings as soon as factory commissioning date is assured. October 2018
8.10 Informal Buyers	1. Set up a register to record buyers and transaction modes. 2. Farmer warning	Traditional Leadership, Farmers Associations, Informal Buyers, Agritex.	Set up working group to start consultation and formulate recording system and logistics. August

	system protocol.		2018
8.11 Livestock	Service abattoirs and cold storage.	MRDC, Business, Veterinary Services, Agritex.	Set up working group to consult and formulate strategy and proposals. June 2019
8.12 Mutasa Auction Floor (MAF)	Establishment of auction floors in Hauna & Watsomba.	MRDC, Business, Agritex, NGOs, Farmers.	Create banana auction July 2018. General horticultural auction on opening of HPP.
8.13 Producer Production Patterns	<ol style="list-style-type: none"> 1. Extensionists to tweak approach to first identify markets. 2. Farmers to specialise in specific crops and spread production over full planting windows. 	Agritex, NGOs, Farmer Associations, Business.	To crosscut with Extension Focus strategy starting June 2018.
8.13 Risk Management	<ol style="list-style-type: none"> 1. Develop credit and insurance solutions to permit buyers access to farmers' products. 2. Remove the fear of loss when farmers sell on credit. 	Business, MAF, Farmers, Insurance companies, Banks.	<p>Engage Insurers to develop short term insurance packages. May 2018.</p> <p>Crosscut with commodity association formation and explain the benefits of.</p>
8.15 Rural Goods Transport	Incorporation of two wheel tractors and trailers.	MAF, Business, Banks, NGOs.	Engage business to provide suitable machines and support including financial. August 2018.
8.16 Sales via Scales	Incorporate into extension messages and possibly vendor licencing.	Agritex, NGOs, MRDC, Business.	Crosscut with Extension Focus. June 2018 and put on Communication 8.3 agenda.
8.17 Savings and Credit	<ol style="list-style-type: none"> 1. Develop systems so farmers can easily accrue capital. 2. Investigate the making of loan repayments as a percentage of sales. 	Farmer Associations, MRDC, Business, Micro-finance, Banks.	Put both topics on Communication 8.3 agenda with the purpose of consultation and the setting up of working groups.
8.18 Standards	Central Markets to grade products for	MAF, Agritex, NGOs, Business, SAZ,	Must be practiced with the first market

	sale.	Specialised markets.	sale. Crosscutting in Extension Focus.
8.19 Storage	<ol style="list-style-type: none"> 1. Improve understanding & knowledge of options available within production systems. 2. Training visits to farmers who are doing it correctly. 	Agritex, NGOs, Business, Farmers, Mins of SME.	Crosscut with Extension Focus.
8.20 Value Addition	<ol style="list-style-type: none"> 1. Consistent product supply. 2. Positive attitude to business. 3. Provision of grading, packing, storage facilities. 4. Smart partnerships. 	MRDC, Business, Farmer Associations, Agritex, Mins of SME.	Put topics on Communication 8.3 agenda with the purpose of consultation and the setting up of working groups.
8.21 Women and Youth	<ol style="list-style-type: none"> 1. Approach smallholder farmers and their operations as family businesses. 2. Incorporate family conflict resolution into extension. 3. Remove structural impediments to inclusion. 	Everyone.	<p>Crosscut with Extension Focus.</p> <p>Put topics on Communication 8.3 agenda with the purpose of consultation and the setting up of working groups.</p>

NB: The MAMS document is the guiding tool for agricultural marketing in Mutasa District and involves numerous stakeholders. Its documentation and implementation is a continuous process which should last for the coming decade. Adjustments will be made to suit prevailing government policies. Areas lacking complete information will be filled in throughout the process with participation from relevant stakeholders.

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