

# POLICY BRIEFING

## Market access policy options for FMD-challenged Zimbabwe

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The beef industry in southern Africa has been a stalwart of economic development, but new conditions of trade, market access and disease dynamics, particularly of foot-and-mouth disease (FMD), mean a major rethink is required. Our research addresses key policy options to allow southern Africa to benefit from the global 'livestock revolution'. It explores what options exist for trade, given changes in demand patterns, global competition and market access conditions, and asks who are the winners and losers of different scenarios for the future.

### Background

From the colonial era until two decades after independence, large-scale cattle ranching formed the backbone of the commercial livestock industry in Zimbabwe. The enterprise was so successful that Zimbabwe became a beef export leader in the SADC region, with access to high value markets in the EU and elsewhere in Europe, as well as in the SADC region.

Although the foreign exchange earnings benefited the country, there were also substantial costs. These included: investments in expensive infrastructure; costs of sustaining the necessary level of foot-and-mouth disease (FMD) control; and the fact that there were relatively few direct beneficiaries, with large land areas taken up by ranching enterprises owned by a few.

However, the redistribution of land in 2000 brought about profound changes in livestock production. At the same time, a variety of factors - including uncontrolled animal movements, damage to fences and loss of capacity in the veterinary services - resulted in a sharp increase in outbreaks of FMD. This resulted in the loss of export

markets, and, following land reform, 90% of the national herd is in the smallholder sector.

### Challenges

How can livestock once again contribute to the national economy in the post-land reform setting? The challenges are multiple. The EU requirements for disease control, product quality and safety have become ever more exigent, and the costs of compliance correspondingly higher. To exacerbate the situation, the imminent replacement of preferential trade agreements with economic partnership agreements means countries may face much stiffer competition from a growing global red meat industry.

### Opportunities

However, demand for livestock products is soaring as incomes increase and urban areas grow,

especially in Asia, but also in Africa. This 'livestock revolution' opens up new and expanding markets for producers in developing countries.

While the prices offered may not be as high as the western European markets, the standards may be easier to achieve.

Yet the conventional approaches to FMD control practised in SADC countries (and others) are very exacting in terms of resources, result in marginalization of cattle farmers living in the control zones, and are unpopular with conservationists. The virus is maintained in wild African buffalo and the infection cannot therefore be eradicated.

Alternative options for control are continuously developing, and Zimbabwe has many opportunities to benefit. For example, the recognition of 'freedom from FMD with vaccination' is used by South American

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## 🗨️ New options offer real opportunities for Zimbabwean livestock producers to once again engage in export trade 🗨️

beef-producing countries and could be important in Zimbabwe, given the challenges of achieving area-based disease freedom in the post-land reform setting.

Two of the newest options are: compartments - biosecure epidemiological units (farms or groups of farms) that can be certified free of specific diseases- and commodity-based trade - which focuses on the safety of the end-product rather than the disease status of the geographical area the animal came from. These offer real opportunities for Zimbabwean livestock producers to once again engage in the export trade, if the appropriate support, management and certification systems are put in place.

### Recommendations

In formulating a policy for livestock trade, options will have to be considered in the light of current realities:

- Beef production is not necessarily the primary objective of livestock holders.

- The current abattoir slaughter capacity is not being used fully, nor is it likely to be.
- The zonal disease freedom strategy is unlikely to be workable, given endemic FMD.
- The dynamic, informal marketing system that has emerged has many potentials that need to be capitalised upon
- There a potential for higher value export for some producers through the creation of compartments.

The disease-free zone model is still seen as the 'ideal', and is what other SADC countries, international standard-setters and many importing countries demand. However, very big questions exist about whether it is feasible or desirable as a model for Zimbabwe in the future. Alternatives are not well known, and there remains uncertainty as to their acceptance and functioning. Nevertheless, the following considerations are important in developing policy to support the restructured Zimbabwean livestock industry following land reform:

- Commodity-based trade offers some real potentials if the policy and implementation frameworks can be elaborated in collaboration with importing countries.
- Local trade in the context of endemic FMD will remain important – and export is not the only goal.
- Compartmentalisation could offer biosecure epidemiological units that can be certified free of specific diseases

### Further reading

**Sibanda, R. (2008) 'Market access policy options for FMD-challenged Zimbabwe: a rethink', Transboundary animal disease and market access: future options for the beef industry in southern Africa, Working Paper 6, Brighton: Institute of Development Studies.**

**Download this paper and others in the series 'Veterinary Science, Transboundary Animal Disease and Market Access: the case of foot-and-mouth disease in southern Africa': [www.steps-centre.org/ourresearch/vetscience.html](http://www.steps-centre.org/ourresearch/vetscience.html)**



### Our research

Through detailed research and stakeholder-led dialogues in Botswana, Namibia, South Africa and Zimbabwe, we have explored scenarios for tackling FMD, relating to different market access and trade options. We investigated what option, or combination of options, makes most sense, given the current context. Different criteria are evident, with often clear trade offs. The studies sought to uncover

which options result in the greatest returns, provide benefits to the broadest group of people and will be the most sustainable. This project was funded by the Livestock for Life programme of the Wellcome Trust and DFID, and was co-ordinated by the Institute of Development Studies, UK.

### Credits

This briefing was written by Mary-Louise Penrith and edited by Julia Day from a

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