





Consolidated Tobacco Processors

Zimbabwe FCV 2020/21 Crop Report # 3 - January 2021

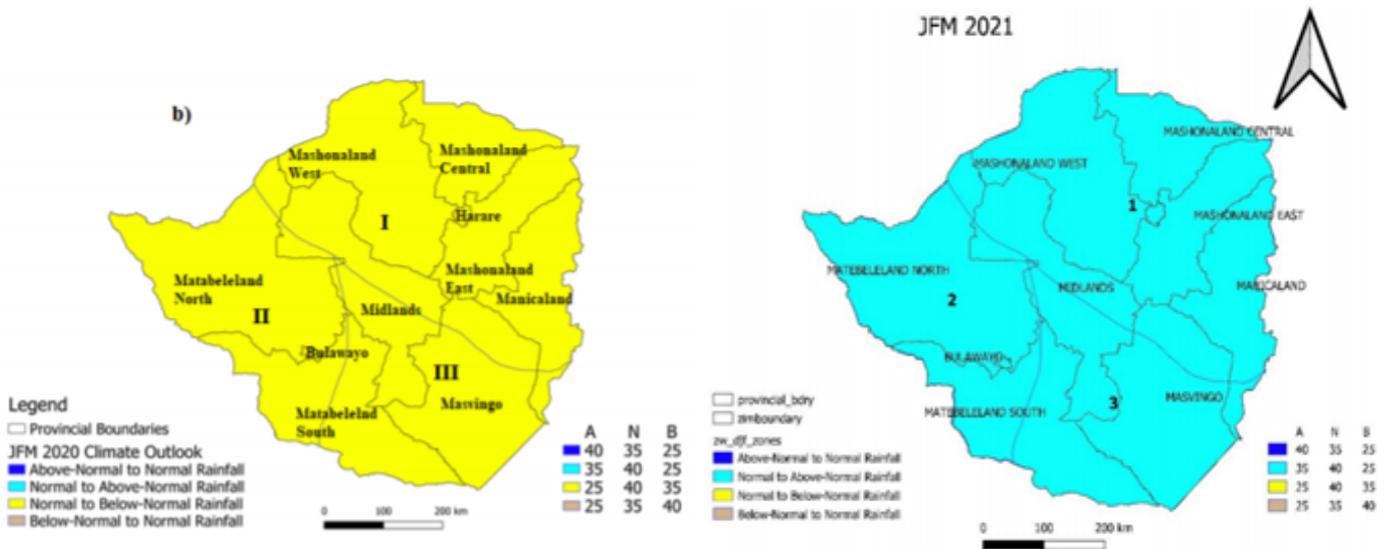
1.0 Climate Outlook

The Department of Meteorological Services forecast for the 2020/21 rainfall season has taken into cognisance oceanic and atmospheric factors that influence Zimbabwean climate including the El Niño Southern oscillation (ENSO) which is currently in its neutral phase. The ENSO is projected to shift into the La Niña phase during the forecast period in the picture below. Implications of this are normal to above normal rains between January and March 2021 which is contrary to the anticipated 40% chance of a drier than expected weather pattern expected for January.

Based on the current weather pattern normal to above normal rainfall has been experienced, along with traditional high temperatures throughout the tobacco growing regions.

The wet spells coupled with high temperatures have enhanced development of both dry land and irrigated crops. Generally, the wet spells and humid conditions have given decent growth opportunity for both dry land and irrigated crops prior to topping.

Long term Average and Seasonal Rainfall Forecast Maps 2020 vs. 2021



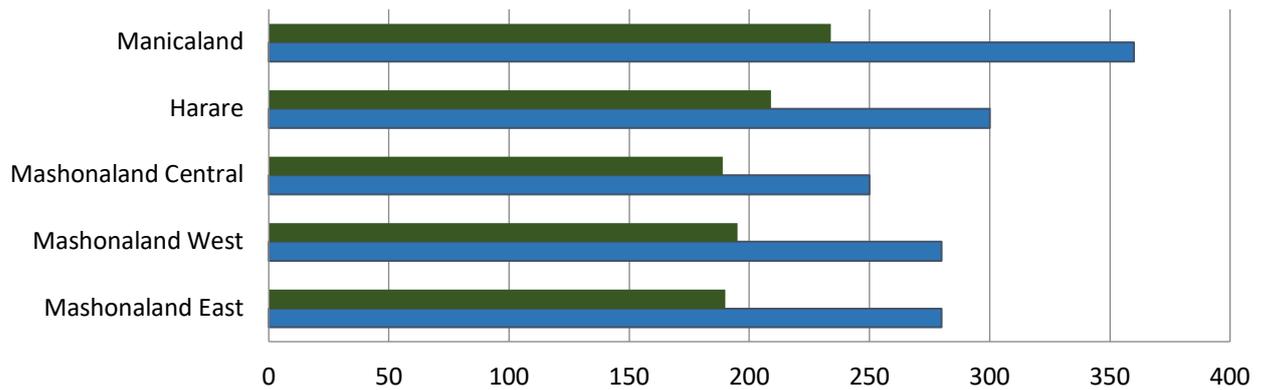
Source: Meteorological Services Department (2020)

Source: Meteorological Services Department (2021)

There have been incidences of heavy rainfall in certain districts, especially in the Eastern parts of the country where tropical cyclone **Eloise** has been located during the past week. However, for the most part initial reports are that there is minimal damage, but further investigations are underway.



January 2020 vs January 2021 total rainfall as at 20 January



	Mashonaland East	Mashonaland West	Mashonaland Central	Harare	Manicaland
■ January 2020 total rainfall (mm)	190	195	189	209	234
■ January 2021 total rainfall (mm)	280	280	250	300	360

Actual rainfall incidence in January 2021 shown in the chart above indicates that, Tobacco growing regions which include Harare, Mashonaland East, Mashonaland West, Manicaland and Mashonaland Central have received normal to above normal rains which is encouraging from a quality perspective in contrast with the previous season. However the rainfall pattern is expected to increase during the following weeks and growers are/will be on high alert for disease and pest incidence.

1.1 Tropical Cyclone Eloise

The bulk of the tobacco crop is promising, except for isolated cases in the East which has been affected by cyclone Eloise. The cyclone predominately ravaged parts of Mozambique and minor portions of Manicaland (East of Harare).It has however been critical for tobacco growers within the area/s that top dressing fertiliser is readily available to avoid losses from leaching. Some farmers in Manicaland recorded tobacco crop casualties where fields were flooded and crops destroyed by heavy winds. As mentioned above CTP are currently investigating the damage. Further reports will follow as and when this is complete.

2.0 Agronomic Outlook

As of 15 January 2021, some 107,254 hectares had been planted, compared to 100,413 hectares in the previous season.

Agronomic factors encompassing normal to above normal rainfall in January in conjunction with adequate supply of inputs from merchants, point towards crop volume estimations between 200 – 210 million kg.



2.1 Irrigated Crops

Utilisation of irrigation facilities has been minimal as all regions have received normal to above normal rainfall. As a result of this, most depleted water reservoirs have been rejuvenated, a good assurance for the long-term sustainability projections and planting of alternative crops.

Harvesting and curing has begun for most early planted irrigated crops. Cured reaping's have been "slat packed" by the commercial growers and "bulk stacked" for small holder growers.

CTP contract growers are currently reaping. Adherence to monitoring curing temperatures to protect the quality of the leaf in line with the change in rainfall patterns from last season to the current season.

Quality seen to date is of a decent standard with most lower stalk reaping's being soft natured and mostly ripe in character.



CTP growers harvesting and curing of early planted irrigated crops.

2.2 Dry land Crops.

Most late planted dry land crops are undergoing suckering and topping while some early planted dry land crops are at the 1st reaping stage.





3.0 National Crop size

3.1 Grower Registration.

Registered growers have increased from 143,934 in the 2019/20 season to 144,529 in the current 2020/21 season at the same period.

3.2 Area Planted.

A total of 107,254 hectares of irrigated and dry land crops combined has been planted compared to 100,413 hectares in the previous season at the same time.

All crops have been planted in the traditional ‘golden leaf belts’, with Mashonaland West province leading with an area planted equating to 40,252 ha, followed by Mashonaland Central at 30,269 ha, and then Mashonaland East with 20,019 ha. Manicaland province sits at 16,714 ha. These figures relating to all tobacco growing areas are according to TIMB. For ease of reference please refer to the below table.

Area planted as of 15th January 2021

PROVINCE	Area planted (ha) 2019/2020		Total area planted (ha) 2019/2020	Area planted (ha) 2020/2021		Total area planted (ha) 2020/2021	% CHANGE
	Irrigated	Dryland		Irrigated	Dryland		
Mashonaland Central	2,444	24,529	26,973	2,286	27,983	30,269	12
Mashonaland West	3,695	35,051	38,746	3,645	36,607	40,252	4
Mashonaland East	7,639	12,168	19,807	6,270	13,749	20,019	1
Manicaland	2,087	12,545	14,632	1,446	15,268	16,714	14
Masvingo		6	6				(100)
Midlands	40	209	249				(100)
Total	15,905	84,508	100,413	13,647	93,607	107,254	7

Source: TIMB weekly Bulletin January 2021

4.0 CTP Agronomic Outlook

CTP agronomy department has continued managing and ensuring that all growers uphold all implemented tobacco agronomic practices. The continued support and communication between growers, field technicians and agronomy management has increased considerably in order to ensure that quality, yields and grower



viability are met. There are challenges that all stakeholders are experiencing during these unprecedented times of the pandemic; however, CTP are working timeously to ensure growers remain relatively uninterrupted.

CTP's contract growers in all regions are well on course to achieve CTP's agronomic targets, as all crops are exhibiting a good crop stand and are largely disease free at this stage albeit the predominately wet season experienced.

The continued focus this season has been on grower training, with an emphasis on basic and efficient curing. The importance of efficient curing is to protect the unnecessary and excessive use of valuable trees within farming communities.

5.0 Covid 19 Outlook

Zimbabwe is experiencing a second wave of COVID 19 infections, as a result of this, Government has enforced another lock down. Although, through the Ministry of Agriculture, government has provided an exemption for all agricultural operations.

TIMB has started working on the operational modalities for this year's marketing season in order to ensure that business is conducted in the safest possible environment for all stakeholders in the industry, given the current spike in Covid-19 cases and deaths under the second wave.

6.0 Summary

Weather forecasts for the second half of the rainy season are now pointing towards normal to above normal rainfall in tobacco growing areas.

Most early planted irrigated crops are between 1st and 2nd reaping stage while most dry land crops are undergoing suckering and topping.

Curing and slat packing is in progress among commercial growers while a few small holder growers with irrigation facilities have commenced reaping and curing.

CTP contract growers in all regions are well on course to achieve CTP agronomic targets.

Although early days the quality seen to date on lower stalk reaping's is predominantly soft natured, carrying good ripeness and spot.

The 2020/21 growing season has seen a 1% increase in registered growers and a 7% increase in area planted compared to the previous season.

Predicted crop size at this stage remains between **200 and 210 million kg's** in the 2020/21 season.