

Smallholder Horticulture

in
ZIMBABABWE



edited by
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HORTICULTURAL CROP PRODUCTION AND MARKETING AMONG SMALLHOLDERS IN ZIMBABWE

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ABSTRACT

Horticultural crop production was traditionally under women's domain. As families migrated to the urban areas, many women utilized their indigenous knowledge of these crops in establishing and maintaining marketing enterprises in the informal economy. This paper analyzes traditional aspects of horticultural crop production within the communal area farming system, utilizing gender and the rural division of labour as key elements in this system. The paper then discusses how women's expertise in horticultural crops was transformed to fit the urban marketing setting of Harare. The analysis then proceeds to characterize the incomes derived from this economic activity with policy suggestions as to how female urban fruit and vegetable vendors might maintain their marketing niche, especially in light of the imposition of ESAP (Economic Structural Adjustment Policies). The paper is based on research conducted 1985-87, 1993 and 1994.

INTRODUCTION

The horticultural crop production and marketing systems in evidence in Zimbabwe today have their roots in patrilineal cultural patterns ascribing to women domain over garden crop production, and in the patterns of colonial manipulation of the economy to satisfy minority demands. In the following pages, I present first a brief sketch of the historical development of current horticultural production practices. I then go on to discuss the structure and function of the nationwide, Harare-based horticultural marketing system, which includes both smallholders and large-scale producers. Thereafter, I focus in on the informal retail vendors of Harare, illustrating through the lens of these female microentrepreneurs the difficulties encountered in operating within this sector. I conclude the paper with recommendations on how the production and marketing of fresh fruits and vegetables might be made more efficient for both the smallholder and the informal sector retailer, i.e., the beginning and end points in the smallholder production-marketing chain.

HISTORICAL INSIGHTS INTO HORTICULTURAL PRODUCTION AND MARKETING

Traditionally and up through the present time, horticultural crops have been produced by women in the gardens over which they were ascribed domain upon marriage. A

woman who was married into her husband's patrilineage was provided the means to produce food to provide her family with daily-consumed staples and vegetable relishes (see Cheater, 1979; England, 1982; and Schmidt, 1992). As a consequence of their prescribed roles, women developed an indigenous knowledge system in the production of fruits and vegetables (Lan, 1985).

Women's rural roles were radically transformed by colonial encroachment. They intensified their agricultural productive activities to produce surplus commodities that could be marketed for cash to pay taxes (see Ranger, 1985). As surplus production increased, fewer members of the family were required to become labour migrants. With the implementation of more stringent regulations against the sale of African-produced commodities, however, labour migration became a necessity for many. As more male migrant labourers were domiciled in urban locations, female surplus crop producers in adjacent communal lands found a ready market for their home-grown fruits and vegetables. Through colonial inadvertency or otherwise, women's movements in town were not as restricted as those of men (Barnes, 1987), and thus a gender-based informal marketing system was created. Informal market structures were first established in Harare at Highfields and subsequently at Mbare, two of the oldest urban locations.

As the need for long-term workers increased, so did the demand for family housing. As the townships grew and family accommodation became available, women growers were not able to travel the distances covering the breadth of the townships to sell their commodities. Women who migrated to be with their husbands also found themselves in a dilemma: how to provision their families without the means to cultivate. Both problems were solved when urban female residents began to "order" commodities from the women who grew them (Barnes and Win, 1992). Upon receiving the wholesale quantities, the urban women "repackaged" the commodities into retail quantities and resold them in their respective townships.

With the continual increases in demand for African labour in the capital city, demand for fresh produce also grew. Women growers were unable to supply the quantities of commodities in demand from their own gardens. Because many women did not drive, it is highly likely that men took on this responsibility and established the wholesaling operations in evidence today at Mbare Musika. These informal sector wholesalers purchased commodities from a range of farmers, from large-scale commercial producers to communal farmers — from whomever produced a reliable supply.

Today, female and male smallholders (including communal and small-scale commercial farmers) continue to grow fruits and vegetables, many of whom sell their harvests at the Mbare farmer's market. On any one day, more than 50 farmers can be found selling crops harvested from their plots: lemons from Mhondoro; pumpkins from Chiweshe; pineapples, papaya, and avocados from Chimanmani; onions and tomatoes from Uzumba; or tomatoes from Beatrice. Their crops, along with those sold by the drivers of the lorries owned by large-scale commercial producers, by small-scale commercial producers, and by resettlement scheme producers, constitute the marketable horticultural output that flows through the informal market into rural and urban households. Urban women's marketing roles continue in retail distribution: we can travel through both the high and low density suburbs of Harare and observe women (and, increasingly since the Economic Structural Adjustment Program (ESAP)

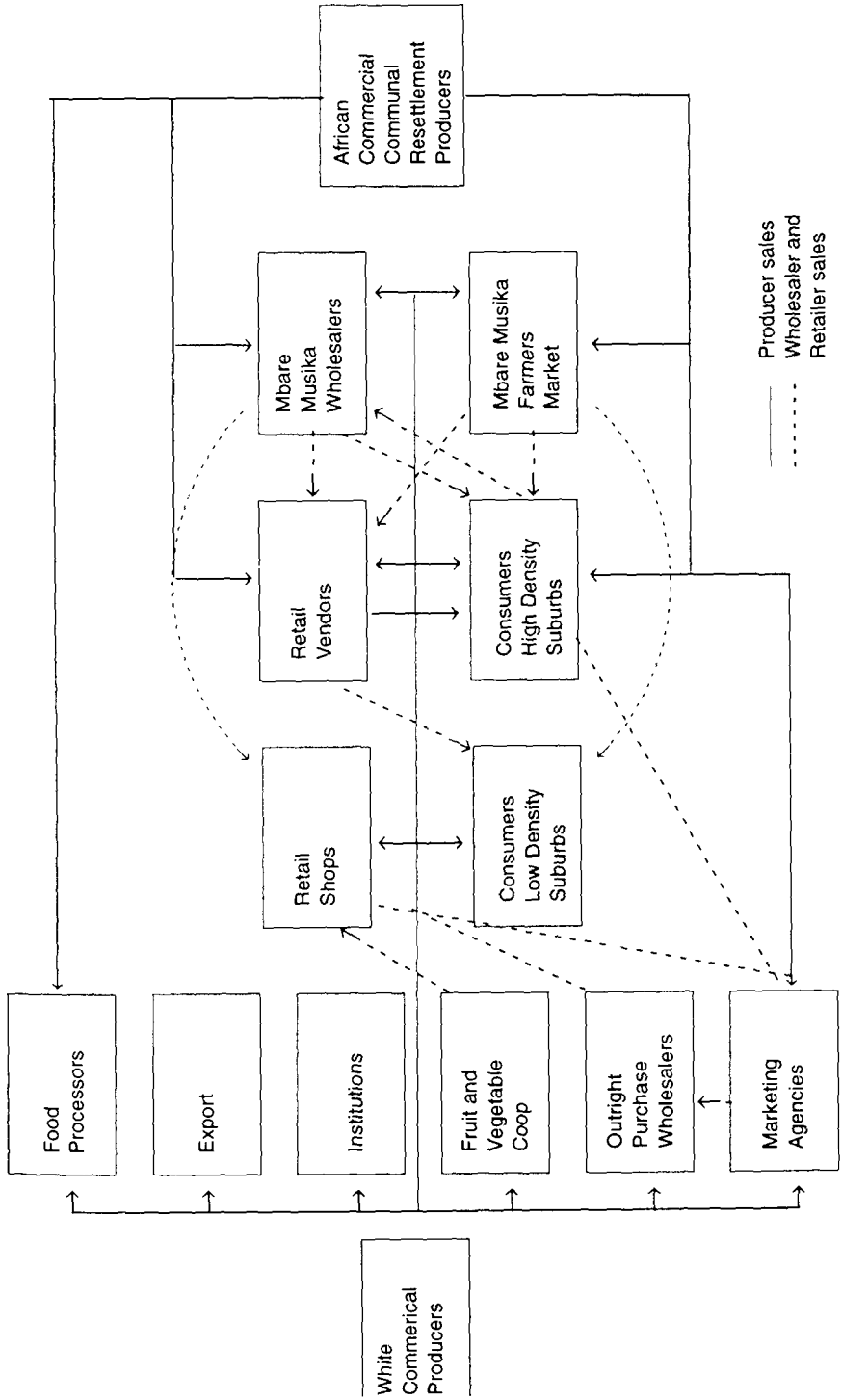
men) selling fresh fruits and vegetables from makeshift tables or brick-built market stalls. The niche women created out of the combination of an indigenous knowledge system and economic protectionism of their families was one means for several thousand Harare women to generate an income. This number was approximately 3,500 in 1986; in 1994, the numbers are inestimable. Since the relaxation of certain vending by-laws by the Harare City Council, motivated by economic reforms (*The Herald*, August 11, 1994, p. 7), and the promotion of the establishment of informal sector microenterprises (*The Herald*, June 9, 1994, p. 8), many former employees who have been retrenched or spouses of those who are unemployed have turned to vending to make ends meet (*The Sunday Mail Magazine*, July 17, 1994). This has led to the establishment of ad hoc vending activities on many thoroughfares throughout the city such that it is impossible to enumerate them with any degree of accuracy.

The informal fresh produce marketing system established in Harare constitutes only one half of the horticultural distribution system. The formal system was established primarily by ethnic Greeks who took on the role of rural-urban trader early in Zimbabwe's colonial history (Kosmin, 1974). With the growth of horticultural crop production in South Africa and transportation linkages between South Africa and Zimbabwe during the colonial era, Greek traders became distributors for imported fruits and vegetables. With UDI and sanctions imposed in 1965, these marketeers were instrumental in convincing large-scale commercial farmers to engage in horticultural production to satisfy local demand. Building upon their expertise in the internal distribution of perishables, Wholesale Fruiterers, a business established approximately 41 years ago, became wholesalers for domestically-grown fruits and vegetables. As more farmers sought to grow a variety of crops for the domestic market, the Independent Market was also established to sell crops on behalf of farmers. With these two markets, Zimbabwe developed two types of wholesale operations that served the large-scale horticultural producer: one designed for outright purchase, and one acting as the farmer's agent. The former wholesalers take greater risks in that they pay a producer at the farm gate or at delivery point; the latter sell commodities on behalf of the producer and charge a commission.

THE STRUCTURE AND FUNCTION OF THE FRESH PRODUCE MARKETING SYSTEM

In 1985–87, when I conducted the original research on fresh produce marketing, the system was largely bifurcated along racial lines (see Figure 1, taken from Horn, 1994). White growers sold their harvests to white wholesalers who, in turn, provisioned restaurants, schools, hotels, hospitals, the military, and other institutions throughout the country. The formal sector wholesalers also despatched orders to supermarkets and greengrocers in other towns and cities. Large-scale producers could also join FAVCO (Fruit and Vegetable Cooperative), which, at the time of the original research, had approximately 20 members, both white and African; membership now includes approximately 69 farmers. White growers also sold a portion of their harvest — crops that did not meet the “Grade A” demands of the outright purchase wholesalers — to African wholesalers either at the farm gate or at Mbare Musika who, in turn, sold wholesale quantities to African women vendors who came to the market from the many suburbs of the city.

Fig 1: Formal and Informal Fresh Produce Marketing Channels



Large-scale producers have a range of options to market their harvests, but smallholder market outlets are much more limited. Producers who can consistently deliver abundant quantities of the highest quality product are more likely to develop long-term supply relationships with formal sector wholesalers than are producers who are unable to meet these needs, even though the quality of their product may be high. In many instances, the quantity smallholders deliver cannot compete with that delivered by large-scale commercial farmers. Hence, rather than having to negotiate price with formal sector wholesalers on the basis of quantity delivered, smallholders tend to deliver their harvests to the only real option open to them in Harare — Mbare Musika wholesalers. Alternatively, if they have the time, smallholders might sell their own harvests at the Mbare farmer's market.

Since completion of this research in 1987, the marketing system has undergone some change. The system is still divided into outright purchase wholesalers, marketing agencies and FAVCO in the formal sector, and Mbare Musika for the informal sector. What I found this year is that Harare is no longer the only distribution center for horticultural produce; local centers have been developed, largely because production has expanded. Stimuli for the reorganization of the system emanated from a number of sources:

- 1) attention by donor agencies to enhance horticultural production, illustrated by the EEC-funded project in Mashonaland East;
- 2) further development of export markets in Europe and, in the near future, the Middle East;
- 3) development of communal area irrigation schemes thus allowing more intensive cultivation;
- 4) increased hectareage brought under production in resettlement schemes;
- 5) fluctuating prices for other commercial crops, such as maize and tobacco; and
- 6) interest on the part of small scale commercial farmers in diversifying their cropping strategies as a result of droughts and agricultural sector policies.

The diversity and geographic distribution of growers created a demand for more localized markets that did not require high transportation expenditure. Hence, wholesale markets have been established in Kwekwe, Gweru, Mutare, Bulawayo and other population centers, although it is not clear to me at this time whether these are formal or informal operations.

Although the marketing system has been diversified geographically, smallholders continue to experience a number of almost insurmountable production and formal market access problems. The cost of borrowing money is prohibitive (between 25 and 30 percent interest rates in the last two years) thus making the costs of production, construction of boreholes and purchase of irrigation equipment too much for the smallholder to bear. Other difficulties, such as transport from the production site to the paved road, access to reliable transport, and prices obtained for produce delivered still plague the marketing of fresh produce for the smallholder. Despite these problems, there is evidence of increasing interest in horticultural crop production.

Before continuing the discussion of the distribution system, I would like to show that, despite all of the difficulties, horticultural crop production has been on an increasing trajectory, with the notable exception of the 1991–92 severe drought years

market stall visited in Harare: tomatoes, onions, potatoes, sweet potatoes, oranges and bananas. It is clear from these figures that the drought took a major toll on production in the smallholder sector. What should also be clear is that those who have reliable market outlets can expand their production or increase their yields with a confidence that the smallholder does not have. Without reliable water sources, transport, market outlets, and prices that will serve as an incentive to continue production, smallholders might well discontinue their horticultural cropping strategies. Production, however, will continue to satisfy the food needs of the family. It is most unfortunate that we do not have production figures for all communal areas where gardens are cultivated by women on stream and river banks, vleis and areas where there are springs. These figures would add considerably to our understanding of the country's total product in horticulture as well as identify more localized marketing and exchange systems that growers have themselves developed. The data presented by Jackson (1997) at this workshop goes some way to meeting this requirement.

ECONOMIC RETURNS: BEFORE AND DURING ESAP

I would now like to turn our attention to the operation of the informal sector retail distribution system, or the end transaction point in the production-marketing chain. The majority of the clientele served at Mbare Musika wholesale and farmer's market are the market women we see selling fruits and vegetables throughout the city. On a daily basis, vendors come to Mbare at 5:00 a.m. from both the high and low density suburbs to replenish their stocks. They negotiate with farmers and wholesalers (see Table 2 for wholesale prices over the last several months) to purchase bundles of rape, tsunga or kovo, a dozen lemons, pumpkins, boxes of tomatoes, a sack of potatoes, cabbages, bundles or bags of onions, and seasonal fruits. If their purchases are not stolen from them by so-called *Makoronyera* (market thugs), then they search for transport to take them to their retail vending sites. If many women from the same market place meet together, they might hire a small truck and share the cost of transporting themselves and their goods. If a vendor is alone, she might pay as much as \$5.00 for herself and her purchases to be transported. Upon arrival at the market site, a vendor divides up her wholesale purchases into retail quantities and displays her produce artfully in front of her. If her market stall does not have lockers, then she must return home to fetch whatever had been left on her stall the night before. After adding these commodities to her display, she awaits the arrival of customers. The normal vending day ends at approximately 8:00 p.m. The vendor must then pack up whatever has not been sold and carry it to her home.

As I moved throughout the city conducting an initial reconnaissance/mapping interview at approximately 150 vending sites (see Table 3, taken from Horn, 1986), I learned the following:

- 1) in one location, there were as many as 105 vendors;
- 2) many vendors were selling the same category of commodities;
- 3) vendors spoke openly about the hardships and harassment they had to endure to stay in their business; and
- 4) every vendor indicated her cash flow was not even and profits were small

Table 1a: Crop production of selected horticultural crops, 1988–1992²

	Farm type	Number					Area planted (ha)					Total harvest (tons)				
		1988	1989	1990	1991	1992 ⁴	1988	1989	1990	1991	1992	1988	1989	1990	1991	1992
Tomatoes	Resettlmt	38	37	48	24	33	133	192	146	76	78	226	409	543	479	392
	Small-Scale Comm'l	644	584	622	437	249	146	140	181	119	67	366	608	465	460	132
	Communal Irrig.	32	36	29	36	25	580	657	492	664	465	11 474	10 974	9 462	10 570	9 536
	Large-Scale Comm'l	146	160	179	187	94	516	512	628	717	700	7 767	10 692	8 688	12 754	17 559
	Total	860	817	878	684	401	1 375	1 501	1 447	1 576	1 308	19 833	22 683	19 158	24 253	27 619
Onions	Resettlmt	8	18	18	15	16	9	27	84	14	19	2	38	161	48	402
	Small-Scale Comm'l	187	297	264	142	100	31	53	55	26	32	39	202	111	236	29
	Communal Irrig.	17	24	20	24	17	22	29	29	41	19	263	192	194	289	93
	Large-Scale Comm'l	112	114	130	166	160	160	456	519	542	662	6 386	5 951	9 134	7 179	8 490
	Total	324	453	432	347	293	518	545	687	623	732	6 690	6 383	9 600	7 752	9 014
Potatoes	Resettlmt	—	—	—	23	20	35	48	75	35	36	80	88	290	127	84
	Small-Scale Comm'l	—	—	110	71	41	25	30	52	27	21	71	89	312	76	5
	Communal Irrig.	6	8	6	2	1	1	1	3	—	—	1	3	47	3	—
	Large-Scale Comm'l	—	—	—	—	—	—	—	—	—	—	—	—	—	—	—
	Summer crop	77	89	87	91	97	477	580	647	611	756	7 802	9 605	11 045	10 007	7 219
	1st Irrig.	66	76	63	84	92	621	637	539	595	618	11 601	11 721	11 029	11 441	8 902
	2nd Irrig.	69	79	76	74	85	553	799	605	706	538	12 109	15 429	11 781	12 427	7 604
	Total	218	252	342	335	336	1 712	2 095	1 921	1 974	1 969	31 584	36 935	34 504	34 081	23 814

Table 1a: [cont.]

	Farm type	Number					Area planted (ha)					Total harvest (tons)				
		1988	1989	1990	1991	1992 ⁴	1988	1989	1990	1991	1992	1988	1989	1990	1991	1992
Vegetables	Resettlmt	17	17	20	15	10	51	54	57	17	29	176	83	677	36	48
	Small-Scale Comm'l	412	415	458	450	309	165	218	266	266	170	701	1 072	1 348	1 143	244
	Communal Irrig.	8	9	4	5	2	3	4	4	2	2	10	23	15	27	10
	Large-Scale Comm'l	19	16	23	27	21	93	95	56	73	59	541	493	432	846	1 175
	Total	456	457	505	497	342	312	371	383	358	260	1 428	1 671	2 472	2 052	1 477

Table 1b: Production statistics (Fruit crops)

	Farm type	Number					Area planted (ha)					Total value of Sales (\$)				
		1988	1989	1990	1991	1992 ²	1988	1989	1990	1991	1992	1988	1989	1990	1991	1992
Fruit ranges ⁵	Resettlmt	2	2	3	6	6	9	4	7	12	2	4 168	2 937	5 764	1 512	70
	Small-Scale Comm'l	309	315	366	472	836	47	25	14	86	78	32 177	33 351	62 459	52 558	57 071
	Communal Irrig.	9	3	23	5	2	3	3	—	2	1	7 203	8 439	2 988	6 400	2 544
	Large-Scale Comm'l	99	115	125	129	115	1 719	1 899	2 064	2 606	2 533	8 405 000	9 324 000	11 143 000	11 244 221	11 333 000
	Total	419	435	496	608	949	1 778	1 931	2 085	2 706	2 614	8 448 548	9 368 727	11 214 221	14 304 691	11 392 695

Table 1b: [cont.]

Farm type	Area planted (ha)										Total value of Sales (\$)				
	1988	1989	1990	1991	1992 ²	1988	1989	1990	1991	1992	1989	1990	1991	1992	
Bananas ⁵	2	4	3	3	3	—	2	2	1	1	212	26 746	940	410	1 100
Small-Scale Comm'l	110	99	152	173	142	31	6	5	75	44	9 182	9 307	24 498	27 841	14 396
Communal Irrig.	1	4	2	2	2	1	2	—	2	2	1 106	2 549	1 818	6 306	7 308
Large-Scale Comm'l	13	12	13	20	18	472	500	625	797	700	1 565 000	3 239 000	4 175 00	5 472 000	7 579 000
Total	126	119	170	198	165	504	510	632	875	747	1 575 500	3 277 602	4 202 256	5 506 557	7 601 804

Source: For Resettlement Schemes: CSO, 1994, Agricultural Production on Resettlement Schemes, 1992, Table 1.0, pp. 5-8 (based on scheme count, which refers to the number of schemes reaping at least one unit of a given fruit or vegetable, and in the case of potatoes and sweet potatoes, the number of schemes planting at least 0.1 hectares of each crop); for Small-Scale Commercial Farms: CSO, 1994, Agricultural Production on Small Scale Commercial Farms, 1992, Table 1.0, pp. 5-8 (based on scheme count, which refers to the number of schemes reaping at least one unit of a given fruit or vegetable, and in the case of potatoes and sweet potatoes, the number of schemes planting at least 0.1 hectares of each crop); for Communal Land Irrigation Schemes: CSO, 1994, Agricultural Production on Communal Land Irrigation Schemes, 1992, Table 1.0, pp. 3-6 (based on scheme count, which refers to the number of schemes reaping at least one unit of a given fruit or vegetable, and in the case of potatoes and sweet potatoes, the number of schemes planting at least 0.1 hectares of each crop); for Large Scale Commercial Farms, 1993, Crop Production on Large Scale Commercial Farms, 1993, Table 1.0, pp. 5-10 (or September 1992, based on a 68% sample, or 3,264 returns out of 4,915 surveys mailed). In all cases, the years noted refer to the twelve months ending September 30 of that year.

The six crops chosen represent vegetables and fruits sold throughout Harare by informal vendors and formal greengrocers and supermarkets. Other crops consumed broadly by the African population are the green, leafy vegetables such as rape, *Isuruga*, *Kovo*, pumpkin leaves, leaves from the nyembe plant, and others. To my knowledge, no statistics exist on the production of these crops.

Statistics expressed in terms of average yields for all types of farms.

1. 1991 Zimbabwe began to experience the worst drought in at least 100 years. The effects of the drought began to be felt in 1991, with even more severe consequences felt in 1992.

or oranges and bananas, yield and harvest data were not presented in the sources cited in footnote 1. Information presented was the value of sales for each of these crops.

Table 2: Wholesale prices for selected horticultural crops (Z\$) 1994¹

Crop	Unit	April 1	May 13	June 17	July 15	Aug. 19
Apples	25 kg		100.00			
Avocados	1 kg	1.25	1.25	.95	1.35	1.25
Beans	10 kg	8.50	15.00	10.50	17.00	22.05
Beetroot	10 kg	9.50	10.00	8.50	8.50	9.50
	Bunches	.85	1.00	1.00	1.00	1.10
Brinjals	10 kg	4.50	5.00	4.50	9.00	5.50
Broccoli	1 kg	4.25	4.50	4.25	4.25	1.50
Butternut	10 kg	16.00	18.00	19.00	19.00	21.00
Cabbage:	Large	1.10	1.20	1.65	1.65	2.00
	Medium	.85	1.00	1.20	1.10	1.20
	Small	.35	.40	.50	.50	.65
Carrots	10 kg	26.50	15.00	9.00	11.00	11.00
Cauliflower	1 kg	3.50	4.00	2.85	2.75	.90
Chillies	1 kg	1.75	2.00	1.75	1.75	1.75
Cucumber	10 kg	9.00	15.00	17.50	16.00	19.00
Gem Squash	10 kg	13.00	18.00	19.00	18.50	21.00
Green mealies	Each	.25	—	.30	.90	.85
Hubbard	1 kg	.85	1.00	1.25	1.70	1.65
Lemons	10 kg	9.50	10.80	9.50	9.50	9.50
Lettuce	Each	.65	.80	.50	.55	.55
Marrows	1 kg	2.00	3.00	2.25	2.50	3.00
Okra	1 kg	3.00	4.00	3.50	3.50	3.50
Onions: Dry	12 kg	29.00	30.00	11.00	11.65	15.00
Green	Bunch	1.25	—	—	.90	—
Spring	Bunch	1.25	1.50	1.10	1.10	1.10
Peas	1 kg	—	3.00	2.75	2.75	3.00
Peppers	5 kg	14.50	18.00	—	21.00	21.00
Potatoes: Large	15 kg	17.00	24.00	23.00	20.00	28.00
Med.	15 kg	14.00	22.00	20.00	17.00	24.00
Small	15 kg	7.50	7.50	11.00	9.00	13.00
Pumpkins	1 kg	.55	1.50	1.25	1.25	1.65
Spinach	Bunch	.75	1.20	.75	.55	.90
Sweet potatoes	1 kg	.90	1.00	1.25	1.10	1.25
Tomatoes	1 kg	2.75	4.00	2.25	1.50	3.25

¹These prices were published in *The Herald, Zimbabwe*, on the dates indicated and were supplied by the Independent Market, a wholesale agency trading in horticultural crops on a commission basis. Not all commodities traded are presented since the Independent Market publishes only selected prices, or those prices of commodities in which they trade.

If competition is overwhelming and returns to labour so low, I pondered, why were there so many women operating these businesses?

To begin with, trading in fresh produce is one income-earning activity in which many women have expertise, a residual from their rural roots. For more than 3,500 women in 1985–87, moreover, fresh produce vending appeared the only income-generating option because it was possible to care for children while vending, it provided a means to create friendship and support networks in a hostile urban environment, it provided esteem to women who wanted or needed to maintain their economic productivity, and it allowed women to maintain their family food provisioning roles (Horn, 1994). Many women who did not establish these businesses (Horn, 1994).

Table 3: Suburban distribution of stall and table vendors, 1985-86

Suburb	Table Sites	No. of Vendors	Stall Sites	No. of Vendors
<i>High Density</i>				
Dzivaresekwa	9	59	3	51
Glen Norah	1	8	5	137
Glen View	8	157	4	108
Hatcliffe			1	8
Highfield	14	177	5	245
Kambuzuma	4	35	4	60
Kuwadzana			4	88
Mabvuku	4	108	3	86
Mbare/Ardbennie	8	30	6	1 269
Mufakose	6	138	5	106
Rugare			1	7
Tafara	1	8	3	101
Warren Park	1	4	3	54
<i>Low Density*</i>				
Arcadia			1	10
Braeside			1	10
Downtown & Southerton	4	52	3	106
Other suburbs	35	238		
Total	100	864	53	2 462
Total Market Sites	— 153			
Total Vendors	— 3 426			

While all of these “benefits” of produce vending were cited by vendors in the earlier research, the profits many generated were inadequate to maintain their enterprises. During the rainy season when many horticultural commodities are scarce and wholesale prices exorbitant, vendors lose money when selling tomatoes in order to keep their customers. When customers are few, commodities purchased wholesale are taken home to eat. This practice, however, does not allow for the cash flow needed to purchase the next day’s supplies and businesses fold temporarily until the infusion of capital from a spouse or relative. For some, the fresh produce trade was highly lucrative. This, too, bore a deeper investigation. One explanation for brisk trade was giving a free tomato or two to a customer who had purchased a number of commodities; the free tomatoes brought customers back. In other instances, assertions were made about the “magic” powder shaken on a stall to entice customers. In yet other instances, I found the range of commodities sold was not limited to fruits and vegetables, but included sweets, tobacco, sadza spoons, snuff, and various herbs.

For the majority of vendors, returns were adequate to pay for daily transportation to the wholesalers (in 1994, this was as high as \$7.00 per day), stall rent (as high as \$43.50 per month), morning tea, and to pay many household expenses that are not covered by a spouse or other household financial contributor (e.g., rent/mortgage, up to \$100 per month; electricity, approximately \$150 per month; water, approximately \$20 per month; and other household expenses, \$30-40 per month).

other household needs — the prices of which have gone up in certain cases more than 500 percent). With pride, many women reported that “these vegetables sent my children to school.”

To illustrate the range of incomes derived from vending, Tables 4 through 9 are presented. Data in these tables present the gross margins achieved by six case study vendors I identified in one low density and five high density suburbs during the period of original research, and whom I revisited during the last two weeks. Immediately recognizable is the jump in wholesale costs and retail prices. These are reflective of inflation, devaluation of the Zimbabwe dollar, and overall effects of ESAP. While it can be argued that women are generating greater returns, they have not kept up with the increases in the consumer price index. For instance, inflation this year is at 23% and is projected to rise to 26% by the end of the year (*The Sunday Mail*, June 5, 1994). Inflation has produced higher prices in transport — bus fares were increased in May 1994 by 15% (*The Herald*, May 21, 1994, p. 1). Municipal services provided to homeowners in the high density suburbs will rise by 17.7% October 1, or from \$25.40 to \$29.20 per month; school fees in council schools will rise from \$39 to \$47 per term; the cost of water will also increase as will the costs of burials, sewage and garbage disposal (*The Herald*, June 22, 1994, p. 1). The cost of basic foodstuffs will also increase. With 1990 as the base year for calculating price rises, by June of this year the index for the cost of food had jumped to 330.0. In prior calculations using 1980 as the base year, the index had risen by December 1991 to 572.2 for lower income urban families (CSO, 1991, Table 2), and for higher income urban families to 545 (CSO, 1991, Table 1). MacGarry (1994:14) has recalculated these figures and posits that by September 1993 the urban Consumer Price Index had risen to 935. For rural areas, he posits that the cost of the seven-member family shopping basket (which included milling maize, maize meal, sugar, salt, flour, bread, soap, matches, cooking oil and paraffin) in 1990 was \$184.98, but by October 1993 had risen to \$459.55 (MacGarry, 1994:9).

Vendors, along with all other Zimbabweans, are trying to cope with turmoil economic restructuring is creating (Kanji and Jazdowska, 1993; Mupedziswa, 1994; Mutsvanga, 1994; Brand, 1992). Despite their efforts to be self-sufficient, however, the production and marketing systems themselves present them with problems. The recent frost serves as an illustration. Produce yielding the greatest return to the vendors, such as tomatoes, bananas, leafy vegetables, and other frost-sensitive produce, suffered damage to the tune of millions (*The Herald*, July 8, 1994, p. 1). Without these marketing “staples,” more vendors are likely to “go under” financially until harvest of the next growing season (provided it is “normal”), and the cost of the urban food basket may necessitate the forgoing of yet another meal.

The most important point I wish to make in concluding my comments about the vendors is that the entire high density suburban population and part of the low density suburban population is provisioned with fruits and vegetables through the microenterprises established by these women. Their efforts, however, are not recognized as significant — not only because of the commodities they sell, but also because of their gender. The women must be recognized for provisioning the city with foodstuffs lower in cost to the consumer than the supermarkets can provide (for

Table 4a: Gross Margins — Amai Daniel — Week of March 3, 1986

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/ kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Apples	7.00	.60	11.750	1.50	.90	10.63
Beans	4.00	.625	6.400	1.38	.75	4.83
Cabbage (DH)	.40	.17	2.300	.30	.13	.29
Derere	.50	.59	.850	1.25	.66	.56
Lemons	.40	.33	1.200	.62	.29	.34
Onions (dry)	7.00	.72	9.700	1.67	.95	11.20
Potatoes	8.00	.26	30.400	.51	.25	7.50
Rape	3.00	.86	3.500	1.11	.25	.89
Tomatoes	33.50	.98	34.170	.87	-.11	-3.77

Total gross margin in for week — \$32.44 Number of commodities sold — 9

Table 4b: Comparable Gross Margins — Amai Daniel — July/August, 1994

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/ kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Apples	47.00	4.00	11.750	6.60	2.60	30.55
Cabbage	3.00	1.30	2.300	1.40	.10	.25
Lemons	1.14	.95	1.200	4.00	2.70	4.80
Masawa	6.00	.60	10.000	2.50	1.90	19.00
Onions	12.13	1.25	9.700	5.03	3.78	36.66
Oranges	11.00	1.10	10.00	2.77	1.67	16.70
Potatoes	65.97	2.17	30.400	2.03	-.14	-4.26
Pumpkins	10.73	1.65	6.500	2.50	.85	5.52
Rape	3.50	1.00	3.500	2.18	1.18	4.13
Tomatoes	110.83	3.25	34.170	2.51	-.74	-25.06
Sugar cane	12.00	.60	20.000	.80	.20	4.00
Tsunga	5.00	2.50	2.00	3.50	1.00	2.00

Total gross margin in for week — \$94.26 Number of commodities sold — 12

Table 5a: Gross Margins — Amai Tendail — Week of April 1, 1986

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/ kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Apples	37.00	.64	57.800	1.00	.36	20.80
Bananas	13.00	.66	19.700	.74	.12	1.58
Beans	6.00	.46	13.000	1.33	.87	11.29
Cabbage (DH)	24.00	.09	268.500	.26	.17	45.81
Cabbage (SW)	14.00	.21	116.400	.36	.15	17.90
Carrots	2.00	.30	6.760	.68	.38	2.60
Cucumber	3.00	.22	13.460	.40	.18	2.38
Derere	10.45	.84	12.470	1.82	.99	12.25
Guava	2.50	.24	10.400	.45	.21	2.18
Lemons	.60	.26	2.280	.53	.27	.61
Magaka	2.00	.16	12.630	.62	.46	5.83
Onions (dry)	25.40	.83	30.600	.67	-.16	-4.90
Peas	2.00	.67	3.00	2.94	2.27	6.82
Potatoes	22.25	.29	76.800	.46	.17	13.08
Pumpkins	4.00	.13	30.940	.30	.17	5.28
Rape	54.85	.51	107.520	.63	.12	12.89
Swt Potatoes	5.40	.24	22.580	.65	.41	9.28
Tomatoes	101.00	1.00	101.115	.83	-.17	-17.07
Watermelon	.60	.09	6.700	.27	.18	1.21

Total gross margin in for week — \$149.82 Number of commodities sold — 19

Table 5b: Comparable Gross Margins — Amai Tendai — August, 1994

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/ kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Bananas	38.02	1.93	19.700	3.42	1.49	29.35
Beans	16.26	1.25	13.00	5.70	4.45	57.84
Cabbage	349.06	1.30	268.500	1.40	.10	26.84
Lemons	2.17	.95	2.280	4.00	2.05	6.95
Onions	38.26	1.25	30.600	5.03	3.78	115.66
Peas	6.00	2.00	3.000	2.50	.50	1.50
Potatoes	89.86	1.17	76.800	2.03	.86	66.04
Pumpkins	51.06	1.65	30.940	2.50	.85	26.30
Rape	107.52	1.00	107.520	2.18	1.18	126.88
Tomatoes	328.62	3.25	101.115	2.51	-.17	-74.84

Table 6a: Comparable Gross Margins — Amai George — Week of May 19, 1986

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/ kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Bananas	18.00	.37	48.450	.95	.58	28.03
Derere	.60	.73	.825	2.86	2.13	1.76
Lemons	.60	.18	3.300	.80	.62	2.04
Magaka	1.20	.17	7.120	.53	.36	2.57
Onions (sp)	4.50	1.32	3.400	1.67	.35	1.18
Oranges	8.00	.38	21.060	.8	.51	10.74
Potatoes	4.50	.30	15.00	.54	.24	3.60
Rape	6.80	.42	16.340	.65	.23	3.82
Tomatoes	82.60	.89	92.820	.97	.08	7.44
Tsungu	4.85	.50	9.680	.94	.44	4.25

Total gross margin in for week — \$65.43 Number of commodities sold — 10

Table 6b: Comparable Gross Margins — Amai George — August, 1994

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/ kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Bananas	93.51	1.93	48.450	3.42	.58	72.19
Cabbage	6.50	1.30	5.000	1.40	.10	.50
Lemons	3.14	.95	3.300	4.00	3.05	10.06
Masawa	6.00	.60	10.000	2.50	1.90	19.00
Onions	4.25	1.25	3.400	5.03	3.78	12.85
Oranges	23.17	1.10	21.060	2.77	1.67	35.17
Potatoes	32.55	2.17	15.000	2.03	-.14	- 2.45
Rape	16.34	1.00	16.340	2.18	1.18	19.28
Tomatoes	4.85	.50	9.680	.94	.44	4.25

Total gross margin in for week — \$97.91 Number of commodities sold — 9

Table 7a: Gross Margins — Amai Dino — Week of June 9, 1986

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/ kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Bananas	3.00	.21	14.300	1.00	.79	11.30
Cabbage (DH)	.60	.13	4.600	.22	.09	.41
Cabbage (SW)	12.00	.19	62.00	.26	.07	4.12
Covo	.90	.22	4.120	.67	.25	1.86
Lemons	.30	.14	2.140	.67	.53	1.13
Magaka	.40	.11	3.650	.37	.26	.95
Onions (sp)	2.50	.55	4.550	1.08	.53	2.41
Oranges	12.00	.31	38.360	.70	.39	14.85
Potatoes	8.00	.27	30.00	.62	.35	10.60
Rape	7.25	.26	27.860	.33	.07	1.94
Swt Potatoes	1.75	.15	11.700	.59	.44	5.15
Tomatoes	18.00	.78	23.040	.83	.05	1.12
Tsungu	2.45	.27	9.000	.74	.47	4.21

Total gross margin in for week — \$60.05 Number of commodities sold — 13

Table 7b: Comparable Gross Margins — Amai Dino — August, 1994

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Bananas	27.60	1.93	14.300	3.42	1.49	21.31
Mauyu	20.00	.22	90.000	.58	.36	32.50
Onions	5.69	1.25	4.550	5.03	3.78	17.20
Oranges	42.20	1.10	38.360	2.77	1.67	64.06
Potatoes	65.10	2.17	30.00	2.03	-.14	- 4.20
Rape	27.86	1.00	27.860	2.18	1.18	32.87
Tsunga	74.88	3.25	23.040	2.51	-.74	-17.06

Total gross margin in for week — \$146.68 Number of commodities sold — 7

Table 8a: Gross Margins — Amai Tatu — Week of July 7, 1986

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Avocado	3.65	.45	8.080	.45	0	0
Bananas	12.00	.38	31.516	.94	.56	17.63
Cabbage (SW)	42.00	.24	175.630	.34	.10	17.71
Magaka	3.50	.23	15.440	.47	.24	3.76
Naartjies	9.00	.36	25.100	.79	.43	10.83
Onions (sp)	24.60	.69	35.700	1.58	.89	31.81
Oranges	4.75	.34	13.960	.73	.39	5.33
Potatoes	18.00	.30	60.000	.44	.14	8.40
Rape	25.70	.38	67.600	.38	0	0
Swt Potatoes	0	0	131.520	.21	.21	27.62
Tomatoes	168.70	1.05	160.650	1.56	.51	81.1
Tsunga	22.40	.37	60.960	.56	.29	11.59

Total gross margin in for week — \$216.70 Number of commodities sold — 12

Table 8b: Comparable Gross Margins — Amai George — Week of May 19, 1986

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Carrots	11.00	1.10	10.000	6.00	4.90	49.00
Lemons	1.42	.95	1.500	4.00	2.00	4.58
Masawa	6.00	.60	10.000	2.50	1.90	19.00
Onions	44.63	1.25	35.700	5.03	3.78	134.94
Oranges	15.36	1.10	13.960	2.77	1.67	23.31
Potatoes	130.20	2.17	60.000	2.03	-.14	- 8.40
Rape	67.69	1.00	67.900	2.18	1.18	79.87
Sugare cane	12.00	.60	20.000	.80	.20	4.00
Tomatoes	522.11	3.25	160.650	2.51	-.74	-118.88

Table 9a: Gross Margins — Amai Paul — Week of July 24, 1986

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Rape	12.30	.24	51.240	.53	.29	14.86
Tomatoes	41.00	.43	95.305	.88	.45	42.87
Tsungu	4.25	.25	17.080	.73	.48	8.22

Total gross margin in for week — \$65.95 Number of commodities sold — 3

Table 9b: Comparable Gross Margins — Amai Paul — August, 1994

Commodity	Wholesale Cost (Z\$)	Wholesale Cost/kg (Z\$)	Kgs	Retail Price/kg (Z\$)	GM/kg (Z\$)	Total GM (Z\$)
Onions	.68	1.25	.500	5.03	3.78	1.21
Oranges	11.00	1.10	10.000	2.77	1.67	16.70
Rape	51.24	1.00	51.240	2.18	1.18	60.46
Tomatoes	309.74	3.25	95.305	2.51	-.74	-70.52
Tsungu	17.08	1.00	17.080	2.18	1.118	20.15

Total gross margin in for week — \$28.00 Number of commodities sold — 5

CONCLUSIONS AND RECOMMENDATIONS

From the large-scale commercial farms of Eskebank, Nascimento, Hippo Valley, Mazoe and others to the communal lands of Mhondoro, Mtoko, Goromonzi, Chimanimani, and the like, horticultural crop producers are in the business of feeding the citizens of Zimbabwe. Marketeers such as Wholesale Fruiterers, P & P Wholesalers, the Independent Market, Zissimatos and the Mbare Musika wholesalers contribute to this sector by moving commodities from the farm gate (at times) through their wholesale operations to institutions and retailers throughout the country. On the retail level, supermarkets, greengrocers and vendors constitute the end point in the production-marketing chain. Each of these players in the horticultural subsector of the agricultural economy has carved out a specific niche in the chain, and each must overcome characteristic obstacles.

It should be no surprise, therefore, that in my concluding remarks I put forward a number of recommendations that, if addressed, might alleviate some of the problems I have identified in my paper. From my point of view, major policy shifts are needed in two domains: integration of all horticultural production and marketing enterprises under one domain; and recognizing women's roles in both the production and distribution systems. Concerning the first recommendation, horticultural production and marketing needs to be viewed as a unified set of activities composed of both commercial and smallholder farms, and formal and informal markets. Resources available to one should be available to all. If research is undertaken to benefit commercial producers, it should also benefit smallholders. This may be achieved

difficult if not impossible owing to the shortfall in funds allocated to the Department of Research and Specialist Services which has severely curtailed on-farm research and now requires that farmers come to the research station to learn of new innovations (Shumba and Waddington, 1993). If credit and loans are available to supermarket distribution chains, then they should also be made available to vendors. If training in new cultivating methodologies is available to commercial production enterprises, then they should also be accessible to smallholders. If registered agricultural commodity enterprises wish to expand their operations into different neighbourhoods, then vendors should have the right to do the same. Where the Municipality provides support services to formal enterprises, they should do the same for informal enterprises. Most importantly, the voices of female producers and vendors need to be heard to ascertain their perceptions of what they need in order to be more productive.

In the case of producers, basic studies identifying amount of land under cultivation, yield per hectare, and the like are needed to provide a baseline databank for improvement. Nationwide studies are also needed on the division of labour in horticultural production, which results are needed to be shared with AGRITEX and NGOs providing assistance to smallholders in order that women, in cooperation with their spouses, become the targeted recipients of information and training on enhanced production strategies (see Muchena, 1994, for other arguments on the need of a gendered perspective in agricultural extension). In the case of vendors, they need to be heard to the same degree that registered business voices are. For instance, supermarket enterprises can conduct feasibility studies as the placement of their building; vendors cannot do the same, nor do they have input in the design of markets — it is simply not viable to construct 105 stalls in one location distant from normal pedestrian thoroughfares and expect the women to stay in the stalls to sell. Rents charged by the Municipality need to be more equitably calculated in accordance with the services and structures provided. Vendors in “open air” locations in low density suburbs should not pay the same amount of rent to sell under a tree as vendors in high density suburbs who sell from a brick-built marketplace with 12 stalls, running water and toilets.

Are there alternatives to vendor reliance on the city? I believe there are. If the horticultural sub-sector of the agricultural economy were viewed as unified, then producers can help in shouldering the financial responsibility for distribution. Commercial farmers, whose commodities are ultimately sold by vendors, can establish a distribution partnership with vendors — similar to the unwritten partnerships they have established with white formal sector wholesalers and African informal sector wholesalers at Mbare. A funding pool could also be established through a minimal levy that can be accessed to construct markets where vendors believe they will be more economically viable over the long term.

By providing an impetus for bringing producers and vendors together to work in a cooperative venture, more direct and reliable supply lines could be developed. On one level, part of this idea has already been operationalized. During periods of glut, the highest grades of produce are either exported or are sold to institutions and greengrocers that specialize in only the highest grades. Lower grades, and sometimes a surplus of the higher grades, are distributed through Mbare and, in certain instances, directly through the vendors. In conducting my research in the mid-1980s, I found

boxes of drum head cabbage. In other cases, I found the drivers for outright purchase wholesalers visiting specific markets to sell their surplus. If the women can assist the wholesalers and producers, why can't assistance also go in the other direction?

The idea of a unified horticultural economy should be pleasing during these difficult economic times. The policies of structural adjustment are calling for greater privatization and self-help activities. In unifying the horticultural economy, Zimbabwe has the potential to create more efficient market mechanisms that serve the needs of the entire urban population, if not the entire country. Seeing each group in competition will create further bifurcation and inefficiency; seeing each other as cooperative partners can help identify niche markets for producers that only those on the front lines — the vendors — can identify. Each can learn from the other. Each has something to offer to the other.

By embarking on such an endeavor, the second recommendation will be operationalized. Women will be recognized for the contributions they make to economic development through production and marketing of horticultural crops. It takes a committed effort for historical stumbling blocks to be overcome, for men and women to learn from each other, and for positive change to occur. I think it is time we begin.

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