

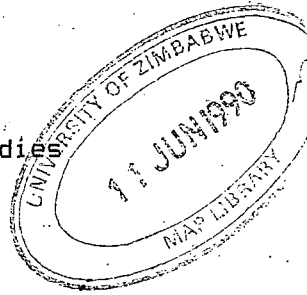
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Edited by: O. Namasasu
Department of Curriculum Studies
University of Zimbabwe
P.O. Box MP 167
MOUNT PLEASANT
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* Authors alone are responsible for the views expressed in GEM *

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by

D.S. Tevera

Department of Geography, University of Zimbabwe

INTRODUCTION

Mining and agriculture have long been the backbone of the Zimbabwean economy. However, since the 1960's the manufacturing sector has greatly increased in importance and it is now the sector that contributes most to the Gross Domestic Product (GDP). Between 1970 and 1980 manufacturing's contribution to the GDP averaged about 25 percent. Agriculture has been the second largest contributor to the GDP. The chief characteristics of the manufacturing industry are: first, the high degree of concentration of output in the hands of a relatively small number of producers and second, its spatial concentration in Harare and to a lesser extent in Bulawayo.

The objective of this paper is to give a general overview of the manufacturing industry in Zimbabwe. Manufacturing industry is one of the core topics in the Geography 'A' Level syllabus and it is hoped that this paper will provide some useful material on this topic.

HISTORICAL DEVELOPMENT OF MANUFACTURING INDUSTRY

When Zimbabwe became independent in 1980 it inherited one of the largest, most diverse and most sophisticated manufacturing industries in Africa south of the Sahara. In 1980 manufacturing accounted for 25 percent of the gross domestic product and employed 159 400 people, or 15,8 percent of the labour force in the wage sector of the economy. Table 1 shows the diverse nature and distribution of the gross value of output by industrial group from 1970 to 1982.

Table 1: Gross Output of Manufacturing Industries by Industrial Groups: Percentage Shares, 1970-1982

Group	1970	1980	1981	1982
Foodstuffs	22,4	22,0	21,3	24,9
Drink and tobacco	8,0	7,0	6,8	7,4
Textiles including cotton ginning	9,3	11,0	10,9	9,4
Clothing and footwear	7,5	6,2	7,0	6,7
Wood and furniture	3,6	3,6	3,8	3,2
Paper and printing and publishing	5,5	5,0	5,1	5,2
Chemical and petroleum products	13,4	14,6	15,2	14,8
Non-metallic mineral products	3,9	2,7	3,0	3,0
Metals and metal products	22,0	24,1	22,8	21,1
Transport equipment	3,3	2,5	2,7	3,1
Other manufacturing groups	1,1	1,3	1,4	1,2
All manufacturing groups	100,0	100,0	100,0	100,0

Source: Statistical Yearbook, Zimbabwe (1987).

The predominance of food, drink, and tobacco industries, which have consistently accounted for about 30 percent of the gross value of output, is characteristic of other developing countries in which manufacturing tends to be dominated by agro-based industries. The high contribution of metals and metal products (24,1 percent of output in 1980) and chemical and allied industries (14,6 percent) indicate a mature and diversified manufacturing sector. Zimbabwe has the most developed capital goods sector in both the SADCC and the PTA regions.

The development of industries from the early days to the present has not been uniform; there were periods of rapid and slow growth. It is on this basis that the historical development of industries will be examined with reference to four time periods.

a) The Early Colonial Period (1914-1952)

Brand (1981) noted three essential features which characterised colonial Zimbabwe's economy during the first half of the century. These were: the paramount importance of primary exports; the highly dualistic nature of the economy comprising a relatively small but technologically sophisticated commercial sector existing alongside a vast underdeveloped African rural subsistence sector; and the ability of colonial Zimbabwe to generate high levels of fixed capital formation over long periods of time, based on a dynamic export sector and substantial inflows of capital from abroad.

Leys (1959), Arrighi (1970), and van Onselen (1976) have shown that manufacturing in Zimbabwe before 1941 developed not as a result of government policy but primarily as a consequence of general economic growth. Several factors contributed to the growth of manufacturing: income from mineral exports; the demand for materials created by public works projects (such as roads and railways); the backward and forward linkages of the primary sector; and the stimulus to import-substitution given by colonial Zimbabwe's distance from the industrialised countries. But manufacturing was also significantly assisted by benign tax and tariff policies.

World War II had a stimulative effect on the manufacturing sector. Because of the war, several imported items became unavailable or costly and the effect of this was to open a market for local manufactures. It is also important to note that during the 1940's the government invested in several industries in order to stimulate the growth of manufacturing, for example, ZISCO (then RISCO) was established in 1948 at Kwekwe and a cotton textile mill was established at Kadoma. Throughout the war years and the post war period, all sectors of the industry grew in real terms--that is, faster than the rate of inflation. The two most rapidly growing sectors between 1939-1953 were textiles and clothing.

b) The Federation Period (1953-1963)

In 1952, the year before the formation of the Federation of Rhodesia and Nyasaland, there were at least 720 manufacturing establishments employing over 68,000 employees. The Federation opened large new duty-free markets for Zimbabwe's manufactured goods. At the same time, the government offered extremely attractive incentives to entrepreneurs to expand or start operations. One result was an influx of foreign private capital, especially from Britain, South Africa and to a lesser extent the United States.

In 1954 Rhodesia accounted for nearly half of the Federation's economic activity and its manufacturing sector represented 77 percent of total manufacturing. Between 1954-1960 the manufacturing sector in Rhodesia increased its share of the GDP from 13 to 16 percent. Several new industries were established during the federal period and they included a large-scale weaving mill at Kadoma, a ferrochrome processing plant at Gweru, and a copper smelter. A fertilizer plant was opened in the late 1950's, and the assembly of motor vehicles began in Mutare in 1960 and during the following year another motor vehicle assembly plant was opened at Willowvale in Harare.

c) The UDI Period (1965-1979) ✓

When the minority settler regime in colonial Zimbabwe unilaterally declared independence from Britain on November 11, 1965, Britain retaliated by imposing sanctions on the rebel colony. Although sanctions did not succeed in toppling the government, they did however accomplish a substantial transformation of the economy. From having been an open economy it became a semi-closed one characterized by extensive government intervention and controls. The most important impact of sanctions on the manufacturing sector was the high degree of protection they immediately gave it.

Between 1965 and 1974 manufacturing output doubled in real terms and there was a rapid expansion of intermediate and capital goods industries, including cotton spinning and weaving, iron and steel, machinery fabrication, nonferrous metals, and plastics. The boom came to an end in the mid-seventies when the war of independence intensified. By 1976 it had become very risky for manufacturers to open industrial plants in remote areas, especially the small urban areas far away from the large cities.

d) The Post-Independence Period (1980 to present)

The manufacturing sector saw a phenomenal expansion following the end of the war, the lifting of sanctions, and the attainment of independence in 1980. Between 1980 and 1981, the volume of production in the sector increased by 26 percent. The highest increases were recorded in the following industries: textiles, clothing and footwear, wood and furniture, paper and printing, chemical and petroleum products, and non-metallic mineral products (Riddell, 1982/83).

In 1981 manufacturing contributed over 26 percent of the gross domestic product and in terms of value added it was the most important sector of the economy. It was also the second largest employer of labour (after agriculture), and by mid-1982 there were over 176,000 employees in the manufacturing sector. Yet the importance of manufacturing extends beyond these indicators because the sector is closely linked with mining and agriculture which are two other important sectors of the economy. For instance, in 1982, 25 percent of the gross value manufacturing production originated in the food, drink and tobacco sub-sectors and over 90 percent of these sub-sectors' inputs came from the agricultural sector. Similarly the metals and metal products sub-sector is dominated by the processing and beneficiation of the country's rich mineral resources.

Taking 1980 as the base year (1980=100), the volume index of manufacturing rose to 109,4 in 1981 then fell during the next three years to reach 100,7 in 1984; it then recovered to 112,2 in 1985. Within the industry growth was very uneven: the transport equipment sub-

sector experienced the most rapid growth between 1981 and 1983 while both the drink and tobacco, and the 'others' category experienced a decline. Manufacturing performance was generally low in 1984 and this is reflected by lower volume indices for all the sub-sectors except the textiles sub-sector whose volume index in fact increased from 108,8 in 1983 to 124,1 in 1984 (see Table 2).

Table 2: Index of Industrial Production
(1980 = 100)

	Weight ^a	1981	1982	1983	1984	1985	1986 ^b
Foodstuffs & stockfeeds	135	108.4	123.7	126.9	119.4	113.6	125.1
Drink & tobacco	104	89.4	91.7	90.1	86.4	94.8	91.7
Textiles (incl ginning)	78.8	111.6	118.8	108.8	124.1	175.0	191.3
Clothing & footwear	72	128.4	118.6	109.2	99.9	111.5	...
Wood & furniture	44	103.4	85.8	82.3	81.6	82.4	...
Paper, printing & publishing	61	112.4	112.3	106.2	95.0	111.7	...
Chemical & petroleum products	125	116.6	118.2	121.4	112.2	121.8	115.9
Non-metallic mineral products	37	118.0	109.7	105.4	99.0	104.7	...
Metals & metal products	288	104.8	96.4	94.8	89.4	100.5	98.7
Transport equipment	21	155.0	178.4	145.6	114.7	96.6	...
Other manufacturing groups	12	95.6	80.0	76.6	50.9	64.2	...
Total	1,000	109.4	108.7	105.8	100.7	112.2	114.3

a Weights are based on net output values in 1980. b January-October average.

Sources: Quarterly Digest of Statistics; Stats-Flash.

The net output of manufacturing in 1985 was Z\$1,797 million and this was 28 percent of the GDP. The leading sub-sectors since 1985 are basic metals and metal products. These sub-sectors have now displaced food processing and clothing and textiles in terms of the gross value of output.

The other development which has occurred since independence has been the increase in both direct and indirect state participation in the manufacturing sector. Directly it has been in the form of purchases into existing companies (for example the state is now the major shareholder of CAPS, the pharmaceutical company); indirectly it has been through a parastatal known as the Industrial Development Corporation (IDC) and by engaging in joint ventures with private companies (for example with Heinz which is involved in the production of foodstuffs).

LOCATION OF MANUFACTURING INDUSTRY

The factors which determine the location of manufacturing industry in Zimbabwe are varied and complex. They are not readily identifiable as individual forces and it is both useful and convenient to consider them in groups. The more important of these are the occurrence of raw materials; the availability of fuel or power, transport, water, land, as well as social infrastructure for the labour force; the distribution of markets; and the availability of suitable manpower and capital. Most, if not all, of these factors are affected by government policy and by general political circumstances such as internal regional stability. In most Third World countries government policy and political factors

per value must aspects of industrial development and at times become the dominant forces.

In this paper no attempt will be made to review each of these groups of factors influencing the location of industry in Zimbabwe because studies by Kay (1970), Trinder (1970), Zinyama (1978) and Tevera (1985; 1986) address the locational factor very adequately.

DISTRIBUTION OF MANUFACTURING INDUSTRY

The industrial landscape of Zimbabwe is very uneven and the distribution of industries is closely related to the colonial settlement pattern. There is also a close relationship with the distribution of the main mineral, agricultural and forestry resources.

Manufacturing industry in Zimbabwe is spatially concentrated in Harare and Bulawayo. These two towns account for about three-quarters of the total number of manufacturing establishments, net value output, and of the total labour force engaged in manufacturing industries nationwide. The industries are spatially concentrated to the extent that the six major industrial centres (Harare, Bulawayo, Kwekwe, Gweru, Mutare and Kadoma) have consistently produced approximately 90 percent of the gross value of output of manufacturing (see Table 3).

Table 3: Gross Output of Manufacturing Industries by Area: Percentage Shares, 1970-1983.

Area	1970	1980	1981	1982	1983
Harare	49,6	48,8	50,5	51,5	47,7
Bulawayo	27,7	22,0	23,5	23,1	24,7
Mutare	3,5	3,3	3,4	3,1	4,5
Gweru	5,0	5,1	4,7	4,0	4,6
Kwekwe/Redcliff	6,4	9,7	7,7	7,1	6,8
Masvingo	1,3	0,9	0,8	1,0	1,4
Kadoma	2,8	2,5	2,2	2,2	2,6
Other Areas	5,7	7,7	7,2	8,0	8,5
All Areas	100,0	100,0	100,0	100,0	100,0

Source: Statistical Yearbook, Zimbabwe (1987).

The high locational concentration of manufacturing activities in Zimbabwe's largest urban centres mirrors the experience of other developing countries where the capital city, which is invariably a primate city, produces a large proportion of the nation's industrial output. Mabogunje (1973) gave a detailed account of the enclave nature of manufacturing in African countries and its tendency to concentrate in national capitals and colonial ports (West Africa provides a classic example). Several studies done in Latin America have shown that the existence of small markets concentrated in a few urban centres confine the locational choices of entrepreneurs to these urban areas (Britton, 1980).

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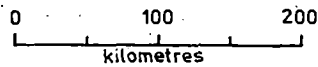
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Kwekwe/Redcliff	6,4	9,7	7,7	7,1	6,8
Masvingo	1,3	0,9	0,8	1,0	1,4
Kadoma	2,8	2,5	2,2	2,2	2,6
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Legend

HEAVY INDUSTRIES

- 1 Iron and steel
- 2 Basic metals
- 3 Engineering
- 4 Car assembly
- 5 Electrical goods
- 6 Railway stock

LIGHT INDUSTRIES

- 7 Foodstuff
- 8 Drinks
- 9 Cotton ginneries
- 10 Footwear
- 11 Tobacco
- 12 Textiles
- 13 Grain milling

CHEMICAL INDUSTRIES

- 14 Fuel
- 15 Fertilisers
- 16 Chemicals
- 17 Oil refining

OTHER INDUSTRIES

- 18 Rubber products
- 19 Cement
- 20 Printing & publishing
- 21 Pulp & paper
- 22 Glass & glass products
- 23 Furniture
- 24 Soap & detergents



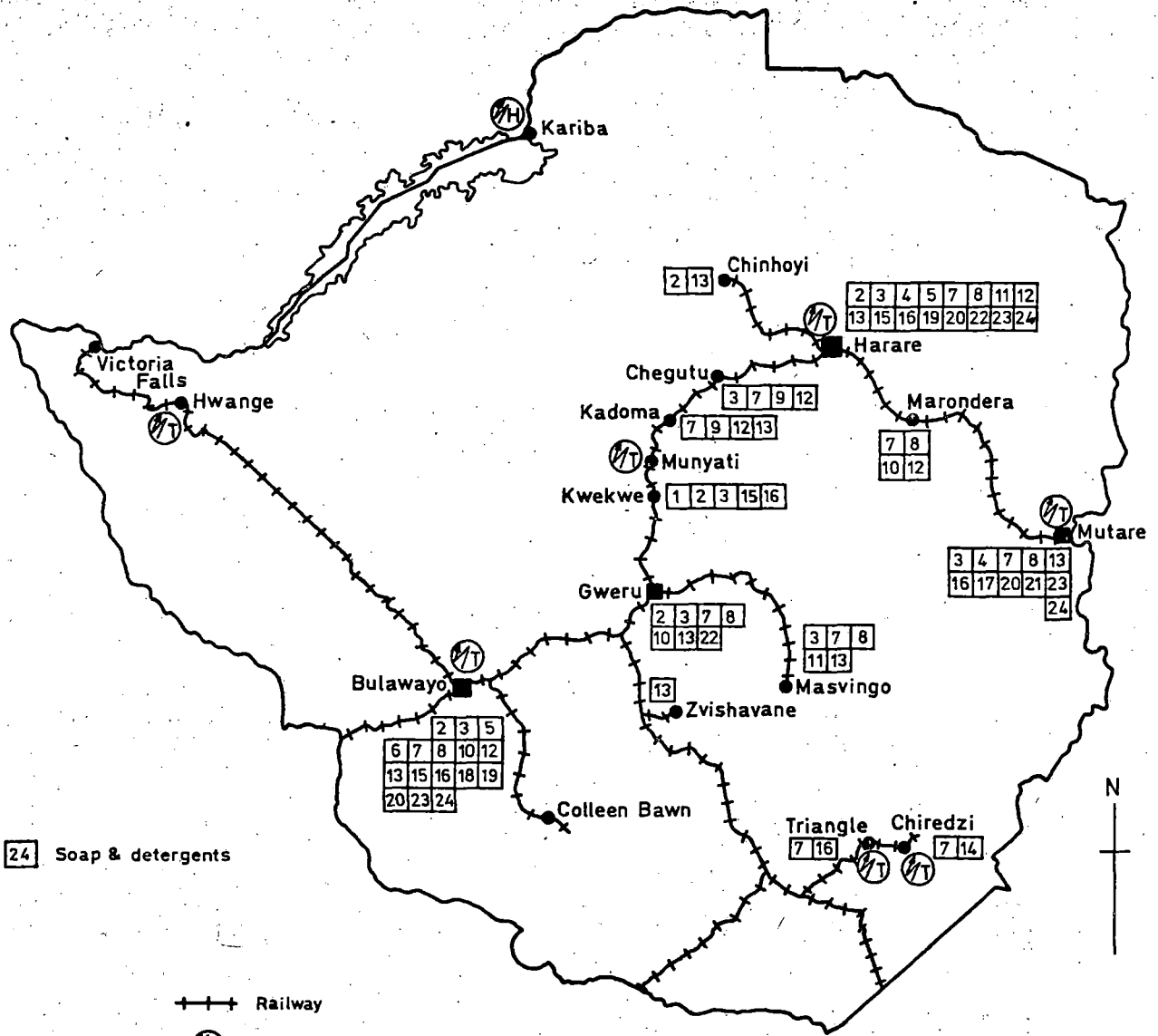
Railway



Hydro-electric power station



Thermal power station



N

The Major Industrial Areas

i) Harare (population 656 011: 1982 census)

Figure 1 shows that Harare has a very diversified industrial sector. Harare's factories employ more than 200 000 workers and they are situated in five industrial areas - Workington, Southerton, Msasa, Beverly, and Willowvale. Factories in these areas manufacture tobacco products, fertilisers, soap, furniture, cement, plastics, glass products, assembly vehicles and they process foods. Harare has an excessive concentration of several industries. For instance, in 1978 it produced 98 percent of the country's tobacco products; 65 percent of the furniture; 76 percent of printing and publishing; 74 percent of fertiliser, insecticides and pesticides; 88 percent of soaps, detergents, toilet preparations and pharmaceuticals; and 70 percent of paints, varnishes and filling materials.

Several factors explain why Harare has emerged as the industrial centre of the country. First and foremost it is the capital and the largest city. Firms located in Harare benefit from 'economies of urbanization and agglomeration'. These economies resulted from the following factors: the existence of back-up services such as banking and other financial services, repair and maintenance services, adequate utility services such as water and power, a pool of skilled and trainable labour, specialist subcontract services, and business services such as advertising agencies. In addition, Harare is located in the country's major farming belt and the importance of proximity to raw materials as a location factor for manufacturing firms is quite apparent.

ii) Bulawayo (population 413 814)

A combination of factors such as initial advantage, close proximity to thermal power and coal from Hwange and a favourable location with reference to major railway lines to neighbouring countries and the rest of the country have firmly established Bulawayo as Zimbabwe's second largest industrial town. In 1982 the industrial labour force employed in Bulawayo was 144 000. Industries that have located in Bulawayo include the following: machinery, textiles, clothing, footwear, furniture, soap, engineering, grain and flour mills, sugar refineries and other factories processing food (see Figure 1). Bulawayo has an excessive concentration of several industries. For instance, in 1978 it produced 71 percent of the country's rubber products; 38 percent of the sawmilling and wooden products (excluding furniture); 35 percent of the furniture; 33,5 percent of the wearing apparel and footwear; and 33 percent of the metal products, machinery and equipment excluding vehicles.

iii) Kwekwe/Redcliff (population 47 607 and 22 015 respectively)

Kwekwe and Redcliff are two separate municipalities which though small in population are generally treated as one big industrial centre for industrial statistics. Figure 1 shows that the two towns have emerged as the focal point for heavy industry in the country. In addition to the iron and steel works, industries relating to steel by-products (for example, the tubeworks of Industrial Pipe and Fittings Limited (formerly Stewarts and Lloyds Limited), the rodmill wireworks of Lancashire Steel Limited, and the steelwire plant of Zimbabwe Wire and Rope Industry (formerly Haggie Wire and Rope Limited) have emerged. The large steel works at Redcliff use iron-ore mined nearby at Ripple Creek

47607
22015

and at Buchwa about 250 km away. The limestone used in the production process is mined locally and the coking coal comes from Hwange. The discovery of chrome in the Great Dyke has resulted in the establishment of a chrome smelting plant which is operated by the Zimbabwe Mining and Smelting Company. A chemical factory producing the country's nitrogenous fertiliser requirements is also located in Kwekwe. The other major industry in Kwekwe is the maltings plant of the National Breweries Limited.

iv) Gweru (population 78 918)

Gweru is the fourth largest urban centre in Zimbabwe and it is also the provincial capital of the Midlands province. The town is the hub of a well developed cattle rearing area. Not surprisingly, therefore, some of the major industries that have located in Gweru include a tanning factory, the country's leading footwear factory, and a Dairy Marketing Board factory which produces butter and cheese. Gweru also specialises in ferro-alloys, packaging, building materials milling and glass bottles. The Zimglass factory in Gweru is the leading producer of glass bottles in the country primarily because silica sand, the main raw material used in glass manufacturing, is mined just outside Gweru.

v) Mutare (population 69 621)

Mutare, the fifth largest urban centre in Zimbabwe, is the provincial capital of Manicaland province. Its particular locational advantages are its proximity to the port of Beira in Mozambique and a plentiful supply of water. About 70 factories have located in Mutare and they produce manufactured goods both for export and for the domestic market. The leading industrial activities in Mutare include timber processing, textiles, fruit and vegetable canning, car assembling, soap manufacturing and glass making (see Figure 1). The canning factory at Mutare is situated in Zimbabwe's leading fruit and vegetable growing area and it produces canned vegetables, fruits, jams, tomato sauce and frozen vegetables. Just outside Mutare at Feruka, an oil refinery with a capacity of 750 000 tonnes a year was built in the early 1960's at the end of the oil pipeline from the port of Beira. However, the refinery has not been operating since the late 1960's following the imposition of economic sanctions.

vi) Kadoma (population 44 613)

Kadoma is the centre of an agricultural and a mining area. It has now become the centre of the Zimbabwean cotton textile industry. Other industries located at Kadoma include engineering, cement products and brick manufacturing, a cheese factory which supplies most of the country, and a paper mill for the recycling of waste paper into tissue paper.

LOCATIONAL POLICY FOR MANUFACTURING INDUSTRY

Since the establishment of the first manufacturing industries at the beginning of this century, the sector has grown rapidly. Indeed, in most years it has grown faster than GNP as a whole. However, since there has not been a comprehensive locational policy for industry, locational decisions have often been made on an ad hoc basis. In the early years (especially just after World War II and the UDI period between 1965 and 1979) the government was mainly concerned with attracting foreign capital to locate in the country. Specific

incentives were offered to make investment attractive to private capital. However, for most of the time, there were no specific attempts by government to attract or redirect industry to locate in small towns and rural areas. The government made it clear in a White Paper published in 1974 that it was in favour of a simple decentralisation strategy which would not hinder the growth of Harare and Bulawayo (Government of Rhodesia, 1974). A strategy involving the adoption of widespread measures such as the provision of incentives and disincentives and the establishment of growth points was rejected because it was feared that such a strategy would cause political divisions among the white electorate (Zinyama, 1978). Davies (1981, p. 77) observed that by the time of independence very little had been done to decentralise industries apart from "...collecting small town data useful to prospective industrialists...". (Government of Zimbabwe, 1981).

However, since independence in 1980, the government has made various pronouncements on the issue of industrial location and decentralisation. For instance, in its economic policy statement, 'Growth with Equity', the government stated that decentralisation of industry was one of the leading objectives of its industrial development strategy (Government of Zimbabwe, 1981).

In pursuit of the goal of industrial decentralisation, the following general objectives were listed: promotion of small-scale industry (through both FEBCO and SEDCO); promotion of resource-based industries; dispersion of industries; and the encouragement of the use of appropriate technology. To achieve these objectives, various incentives have been offered to decentralising industries. They include concessions on custom duties, preferential treatment in the allocation of foreign currency and the provision of infrastructure. However, if meaningful decentralisation is to occur there is need to produce a comprehensive locational policy.

So far the policy of industrial decentralisation has not been successful in reversing the trend towards the concentration of manufacturing production in the two largest towns. The First Five Year Development Plan (1986-90) concedes that relatively limited progress has been made with regard to the promotion of economic development in rural areas and small urban centres such as Sanyati, north of Kadoma and Mpandawana, north-east of Masvingo. The policy of decentralisation of industries has not been successful because of the following constraints: lack of adequate markets in rural areas and small towns; infrastructural problems such as lack of services and limited agglomeration economies; long distances from suppliers and markets; and the difficulty of attracting managerial and professional skills. The other reason why decentralisation has not been successful so far is because there is a mismatch between government policy and the objectives of private entrepreneurs. For example, government incentives are being offered at rural service/growth centres where the various constraints of infrastructure and market are most acute. On the other hand, investors would more likely prefer the smaller and medium sized towns such as Norton, Marondera and Chegutu where infrastructure is already available.

CONCLUSION

A clear understanding of the industrialisation process in Zimbabwe can be achieved if one examines the process with special reference to the political and historical events which shaped both the direction and pace of growth of the manufacturing sector. These events were the

Second World War, the Federation of Rhodesia and Nyasaland, the Unilateral Declaration of Independence and the consequent imposition of sanctions, and the attainment of independence which was followed by the lifting of sanctions.

Government policies in Zimbabwe aiming at influencing the spatial pattern of manufacturing investment have been varied. The spatial impact of early government policies was to encourage the location of industry in emerging core regions such as Harare and Bulawayo which already possessed a comparative advantage. However, since independence, government has pursued ad hoc policies intended to decentralise industries by attracting them to particular areas. There can be little doubt that the concentration of industrial investments in a few areas of the country is increasing regional inequalities. There is therefore urgent need for government to evolve a locational policy aimed at decentralising industries by making smaller urban centres attractive to potential investors.

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