Understanding Zambia’s Domestic Fresh Produce Value Chains

Background and Context

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Past Patterns in Growth of Horticultural Production
Total % growth in per capita supply of FFV and cereals, by region, 1971-2000

Great growth potential, but …
Total % growth in per capita supply of FFV and cereal, by region, 1971-2000

One explanation for this pattern is lack of markets. If markets existed and were well linked to farmers, supply may be able to grow substantially.
Forces of Change in African Horticultural Systems

Projected % Growth in Rural and Urban Populations, 2005-2020

- Zambia
- Moz
- Malawi
- TZ
Forces of change …

- Urbanization
  - Will place **major demands** on marketing infrastructure
    - In urban areas,
    - Linking rural and urban areas
    - Hard and soft infrastructure

- Income growth
- Supermarket chains & small supermarkets
- Growing tourist industry
- Growing international export markets
- Growing regional export markets

Remember …

- Over 95% of all horticultural transactions across the world are in **domestic** markets
  - Even in Kenya, domestic market is 4x-5x larger than exports
  - In Mexico, domestic system is twice as large as exports
  - In Zambia …

- By far the largest absolute growth potential is in **domestic and regional markets**

- Horticulture generates much more employment than cereals
  - Especially for women, both on- and off the farm
How to respond to opportunities

- Practical information to identify opportunities and constraints, and elements of a solution
- Collaborative action among the public and private sectors
- Information generated, reviewed, and used in context of a stakeholder working group
  - Partnership between public and private sectors, and donors