

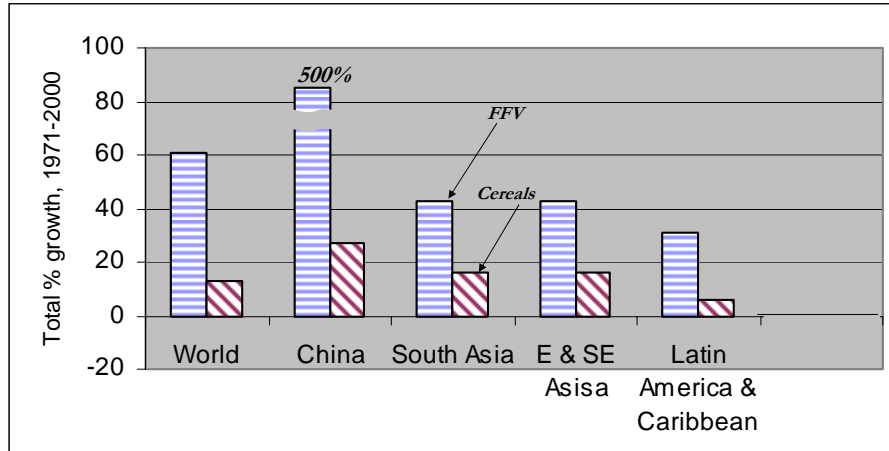
Understanding Zambia's Domestic Fresh Produce Value Chains

Background and Context

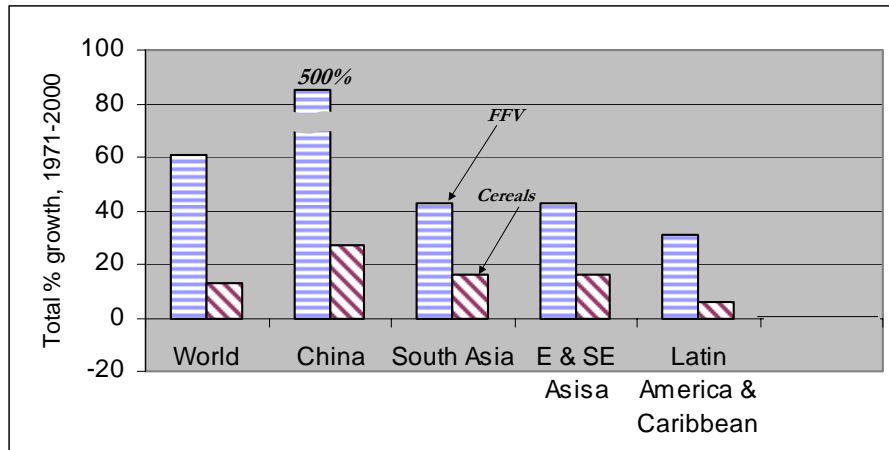
David Tschirley

Past Patterns in Growth of Horticultural Production

Total % growth in per capita supply of FFV and cereals, by region, 1971-2000

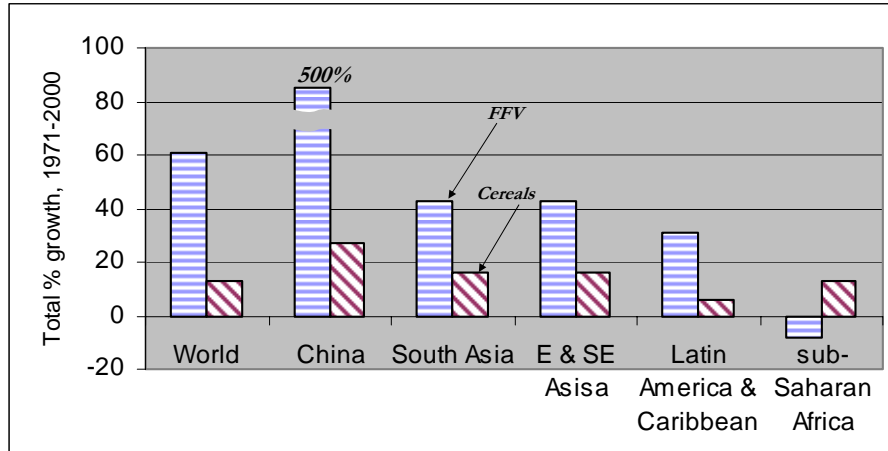


Total % growth in per capita supply of FFV and cereal, by region, 1971-2000

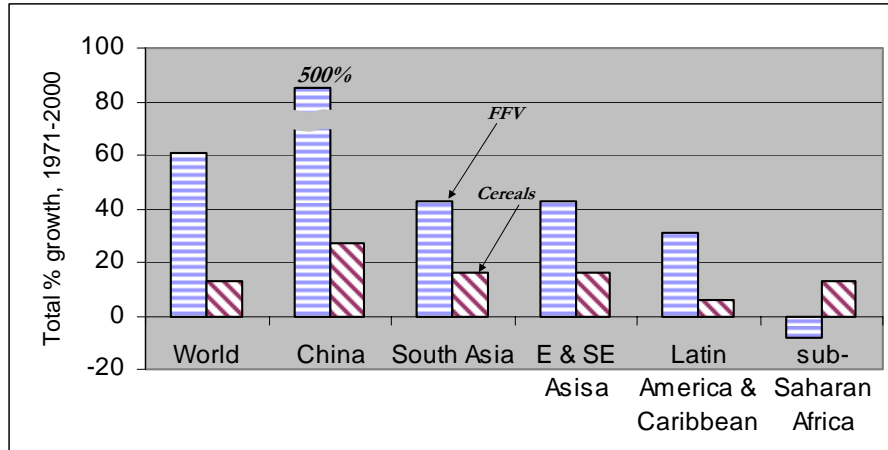


Great growth potential, but ...

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



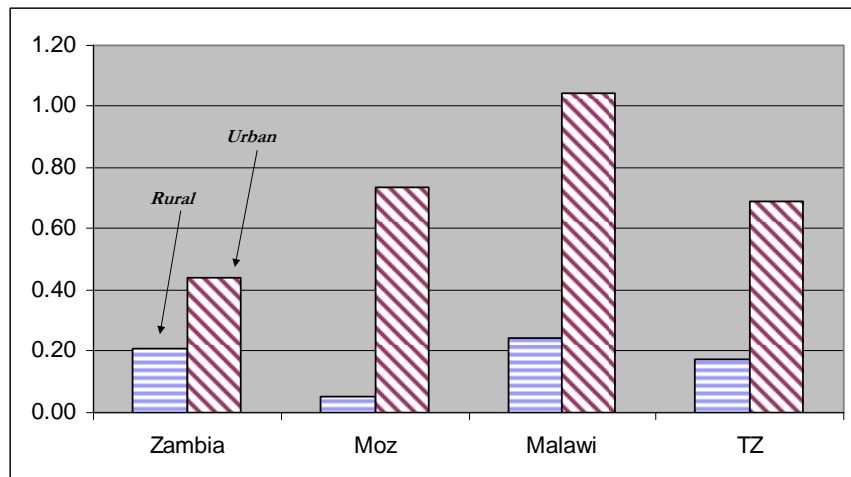
Total % growth in per capita supply of FFV and cereal, by region, 1971-2000



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



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