
**Facilitating the effective production and
marketing of processed food products by small-
scale producers in Zimbabwe**

Output 5: Report of the identification of potential
solutions

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1 INTRODUCTION

1.1 Introduction

The University of Zimbabwe and The University of Reading have been conducting research on the production and marketing of processed food products by small-scale producers in Zimbabwe. The project is now in its third and final phase. The main objectives of the project have been to determine constraints to the production and marketing of food products by the small-scale sector.

Phase I of the study included consultations with key informants, a retail survey of processed fruit and vegetable products currently on the market in Zimbabwe, a series of focus group discussions with consumers, and a series of case studies with small-scale producers/processors. Information gathered from these activities was key to the design and elaboration of research conducted under Phase II of the project. The latter included conducting a producer/processor survey with 300 cottage and micro-enterprises across three provinces of Zimbabwe, involved in processing dried fruit, dried vegetables and fruit preserves (i.e. jams, marmalade and jellies). The research also involved a consumer survey with 500 low-, middle- and high-income households in Harare, which focused on the purchasing and consumption patterns of the products indicated. Constraints to the production and marketing of processed horticultural products by small-scale producers/processors were identified during Phase II (Table 1.1).

Phase III has involved the identification of potential solutions to the constraints highlighted above, and the validation of these through discussions with small-scale producer/processors themselves. The project will conclude by producing a series of policy recommendations, that are considered both technically and economically feasible instruments for facilitating the effective production and marketing of value-added products (based on horticultural and/or fruit crops) by small-scale producers. The latter will be developed through a process of consultation with key informants, including national and municipal government departments, NGOs, producer/processor organisations, etc. The recommendations will be discussed in terms of their economic, technical and political feasibility.

Table 1.1 Constraints to the production and marketing of processed food products by small-scale producers/processors in Zimbabwe

<ul style="list-style-type: none"> • Lack of primary resources (land and water resources), and capital inputs. • Inadequate support from public departments and other organisations in terms of training (e.g. farm operation/production, processing, handling, marketing).
<ul style="list-style-type: none"> • Unavailability and use of 'inappropriate' technology: processing techniques, handling of raw materials, etc. Knowledge of post harvest technology. Lack of appropriate storage facilities, e.g. cold storage for raw materials, semi-processed products and processed products.
<ul style="list-style-type: none"> • Access to suitable packaging materials (e.g. glass bottles, plastic bottles, polythene bags, etc.) and packaging sizes (small, medium, large). And/or use of recycled packaging material (e.g. glass jars and plastics) Problems of hygiene and cleaning of recycled packaging materials
<ul style="list-style-type: none"> • Lack of access to credit facilities.
<ul style="list-style-type: none"> • Declining tourism industry (domestic and foreign tourists). Impact of declining tourism industry and deteriorating economy
<ul style="list-style-type: none"> • Lack of available knowledge of food products produced by small-scale producers. • Lack of information about small-scale food processors.
<ul style="list-style-type: none"> • Inability to provide varying quantities of products and inconsistent supply of products throughout the year.
<ul style="list-style-type: none"> • Poor shelf life of products.
<ul style="list-style-type: none"> • Inability to comply with food safety standards and regulations.
<ul style="list-style-type: none"> • Limited access to viable marketing channels.
<ul style="list-style-type: none"> • Inability to use acceptable food labelling.
<ul style="list-style-type: none"> • Limited access to viable marketing channels.
<ul style="list-style-type: none"> • Inability to use acceptable food labelling.

1.2 Objectives of Phase III

Therefore, the main objectives of activities under Phase III are:

- To draw up a list of potential solutions to the constraints (i.e. to the production and marketing of processed food products) identified from the producer/processor and consumer surveys (See Table 1.1), through a process of consultation with key informants.
- To validate the potential solutions identified above, through in-depth interviews with a sub-sample of small-scale producers/processors.
- To draw up a list of policy recommendations that are considered both technically and economically feasible instruments, for facilitating the effective production and marketing of value-added products (based on horticultural and/or fruit crops) by small-scale producers.

1.3 Methodology

1.3.1 Identification of potential solutions

In order to identify potential solutions to the constraints (to the production and marketing of processed food products) highlighted from the producer/processor and consumer surveys, a series of semi-structured interviews (n=15) were carried out with providers of technical assistance, policy-makers and producer/processor organizations. The identification of informants to participate in the exercise was facilitated by previous consultations exercises carried out under Project R7485, and other links that the project team had built up with various organisations during the course of the project.

Letters of invitation were sent to potential informants in order to request their participation in the semi-structured interviews, and outline the objectives of the proposed interview and further details of the project. In some cases, it was difficult to get individuals or organisations to participate in the activity given their heavy workloads. To reduce the amount of disruption upon informants, interviews were largely held at the offices of the respective organisations and usually lasted between 1 and 2 hours. Given that the team were satisfied that they had generated sufficient information from the 16 interviews held, no further interviews were scheduled. Table 1.2 presents a list of informants that participated in the study.

Table 1.2 List of informants that participated in 'Identification of potential solutions' exercise

Organisation	Individual interviewed	Role of organization	Interview carried out by:
Consumer Council of Zimbabwe	Mrs Mutondohori	Provide technical assistance	L.K. Nyanga
Chinhamora Agricultural Producers Association	Mr Gahadza	Producer/processor organization	R.Nazare / N. Mhazo
City Health Department	Mr. Chibanda	Provide technical assistance	H.T. Gadaga / L.K. Nyanga
Development Technology Centre (DTC), The University of Zimbabwe	Mr. Tunga Rukuni	Provide of technical assistance	P.Muredzi
Zimbabwe Farmers Union	Mr Chingwaru	Provide technical assistance	. Muredzi / N. Mhazo
Government Analyst Laboratories	Mr Zindi	Provide technical assistance	T. H. Gadaga
Horticultural Research Centre	Mr F. Chigumira	Provide technical assistance	N. Mhazo
Jekesa Pfungwa/Vulinqondo	Mrs Jambaya	Provide technical assistance	P.Muredzi / N. Mhazo
Ministry of Youth Gender & Employment Creation	Mrs Katena	Policy-maker	T.H. Gadaga / N. Mhazo
Murehwa Food Processors Association	Mr.B Nyatumbu / Mrs Muzuva	Producer/processor organization	L.Nyanga / R.Nazare
SEDCO	Mr W. Fifteen	Provide technical assistance	H.T. Gadaga
Silveira House	Ms J. Chuela	Producer/ processor organisation	R. Nazare/ L.K. Nyanga
Standards Association of Zimbabwe	Ms L. Terera	Provide technical assistance	R. Nazare / B. Mlambo
Zimbabwe Project Trust	Mr Chipare	Provide technical assistance	R. Nazare / B. Mlambo
Zimbabwe Women's Bureau	Mr Matione	Provide technical assistance	N. Mhazo / P.Muredzi

1.3.2 Validation of potential solutions

To validate the potential solutions identified above, in-depth interviews were held with a sub-sample (n=15) of small-scale producers/processors that participated in the formal survey carried out at the end of 2002.¹ The interviewees included representatives of the three study products (i.e. dried fruit, dried vegetables and fruit preserves). Given the constraints faced by the project team in terms of sourcing fuel etc., interviewees were selected on the basis of their proximity to Harare. Again interviewees were contacted in advance and requested to participate in the exercise. All in all, the response from the sub-sample of small-scale producers/processors was very positive. Interviews were largely held at the production sites of the respective producers/processors. Most interviews lasted approximately 2 hours. Table 1.3 gives some details of the informants that participated in the validation exercise.

Table 1.3 Sub-sample of small-scale producers/processors that participated in 'Validation of potential solutions' exercise

	Type of enterprise	Location of business (district, ward, etc.)	Agro-ecological region where small-scale enterprise located	Product(s) processed
Dried Vegetables	1. Dried vegetables processor	Nyamutumbu Village, Murehwa	2b	Dried vegetables
	2. Dried vegetables processor	Murehwa centre, Murehwa	2b	Dried vegetables
	3. Dried vegetables processor	Nyamutumbu village, Murehwa	2b	Dried vegetables
	4. Dried vegetables processor	Wengezi Junction, Chimanimani	3	Dried vegetables
	5. Dried vegetables processor	Chiwaka Village, Mudzi	3	Dried vegetables
Dried fruit	1. Dried fruit processor / vendor	Chipinge town	1	Dried fruits
	2. Dried fruit processor / vendor	Nyamutumbu village, Murehwa	2b	Dried fruits
	3. Dried fruit processor / vendor	Mt Selinda Hospital	1	Dried fruits
	4. Dried fruit processor / vendor	Chipinge town	1	Dried fruits
	5. Dried fruit processor / vendor	Chipinge town	1	Dried fruits
Jams / Fruit preserves	1. Jam & preserves processor	Malwaitte Village, Marondera	2a	Fruit Jams and preserves
	2. Jam & preserves processor	Rainvalley Farm, Nyanga	1	Fruit Jams
	3. Jam & preserves processor	Froggy Farm, Nyanga	1	Fruit Jams and preserves
	4. Jam & preserves processor	Halfway House, Marondera	2a	Fruit Jams and preserves
	5. Jam & preserves processor	Juliasdale, Nyanga	1	Fruit Jams and preserves

¹ Report 4.2 Report of producer/processor survey.

1.3.3 Research instruments and data analysis

Both sets of interviews followed a standard semi-structured interview schedule that was designed on the basis of results from previous research conducted under the project. Appendices 1 and 2 provide copies of the semi-structured questionnaires used. Two members of the project team attended each interview. One individual steered the interview, while the other took on the task of making notes of the discussion. Detailed notes were then written up immediately after the interview was conducted.

The information was compiled from the various interviews conducted within each exercise. The qualitative data was analysed manually by constructing a series of tables to help organize the abundance of information gathered.

1.4 Limitations of the study

The project team faced various challenges during Phase III of the research. For example, the consultation exercise in order to identify potential solutions to the constraints identified, had been originally scheduled to take place during the first week of June 2003. Unfortunately however, the interviews had to be postponed due to the national strike during 2-6th June 2003. The team also faced further difficulties gaining commitment from informants, and scheduling the various meetings. This was no doubt due to the general disruption caused by the strikes. In retrospect, it might have been more appropriate to organise a one-day workshop with informants in order to collect the necessary information. Nonetheless, the quality of the discussions held with key informants was high, and project team members were satisfied that they had fulfilled the objectives of the research activity, through holding individual meetings with a wide range of informants.

Visits with producer/processors were constrained by difficulties accessing fuel. Therefore, the sub-sample of producer/processors used, was in some ways biased, as these were often processors with greater advantages in terms of infrastructure and communications given their greater proximity to Harare. The quality of the information gathered however, was satisfactory.

1.5 Organisation of the report

The report continues with a discussion of the constraints identified and the key solutions proposed by the various key informants to address such constraints (See Chapter 2). Chapter 3 provides a discussion of the key findings generated from the series of in-depth interviews held with the sub-sample of small-scale producers/processors. Chapter 4 then presents an overall discussion of the findings and concludes by highlighting those solutions, which are considered feasible and workable by small-scale producers/processors and consumers.

2 IDENTIFICATION OF POTENTIAL SOLUTIONS

2.1 Introduction

The exercise of identifying potential solutions involved interviews with producers / processors; finance organisations, training institutions, research institutions, standards organisations, environmental health institutions and service providers (Table 1.1). Constraints to the production and marketing of processed horticultural products by small-scale producers/processors were identified during Phase II (Table 1.2) and these were presented to various organisations and potential solutions to the identified constraints were sought.

The information was compiled from the various interviews conducted. The qualitative data was analysed and solutions to the respective constraints recorded as notes were synthesised to concise solutions by members of the project team as a group. Table 2.1 shows the concise potential solutions as recorded by the team.

Table 2.1 Identified Potential solutions

Identified Constraint	Solution Identified
Lack of primary resources (land and water resources), and capital inputs.	Review current legislation governing access to water resources (issues of water rights)
	Development of low cost irrigation systems, and water harvesting techniques that are appropriate in a smallholder set-up.
	Review current land tenure system with a view to providing security of ownership (giving priority to small-scale (female) producers).
	Promote networks between small-scale producers/processors via formation of commodity associations, and other organizations to access inputs (e.g. raw materials, packaging materials, credit, etc.).
	Promote linkages between producers and research and development institutions and other organizations in order to improve access to resources (e.g. seeds, agro-chemicals, processing technologies).
Inadequate support from public departments and other organizations in terms of training (e.g. farm operation/ production, processing, handling, marketing).	Need for coordinated decentralized approach to the provision of training. This may include involvement of expert trainers, but also recognition/adapting of local indigenous knowledge (e.g. producer-producer or farmer-farmer training programmers). Such trainers should be based in local communities (i.e. exposing them to the needs of beneficiaries) and conversant in local languages.
	More effective promotion of training programmers available (e.g. via local agricultural shows, exchange visits, and attachments to research and training institutions) and identification of potential beneficiaries (i.e. those already involved in production and therefore with greater access to raw materials).
	Development of appropriate training courses (both formal and informal), which are open to monitoring and evaluation by all stakeholders involved.
Unavailability and use of 'inappropriate' technology; processing techniques, handling of raw materials, etc. Knowledge of post-harvest technology. Lack of appropriate storage facilities, e.g. cold storage for raw materials, semi-processed products and processed	Encourage co-operative or commodity associations to build processing plants that serve them as a group, and/or the promotion of 'service processing' centres.
	Create local fora and platforms for sharing information. For example, outreach programmers showcasing technologies at village/ward level. Furthermore, promote producer-producer, processor-processor initiatives concerning local knowledge of 'appropriate' technologies.
	Encourage R&D of 'appropriate' processing equipment/technologies
	Improve co-ordination among stakeholders (e.g. Ministry of Health, Standards Association of Zimbabwe, Government Analyst, Institute of Food, Nutrition and Family Sciences, etc.) in order to provide appropriate information training and knowledge of food law and food safety issues, with particular focus on small-scale producer/processor operations.

products Access to suitable packaging materials (e.g. glass bottles, plastic bottles, polythene bags, etc.) and packaging sizes (small, medium,	Effective enforcement of food standards and regulations, and monitoring of facilities used for processing food products.
	Further R&D initiatives concerning alternative packaging materials (e.g. sachets for jam making), and feasibility (e.g. establishment of small-scale recycling plants) of recycled packaging materials.
	Routine examination and quality control of raw materials, including water.
Lack of access to credit facilities	Improving access to long-term credit facilities, both formal (e.g. revolving funds, 'land banks' sensitive to farmer credit needs) and informal (e.g. micro credit schemes offered by NGOs, women's organizations or other groups setting up 'borrowers' groups), for both producers and processors.
	Greater provision of information on sources of funding (formal and informal sources, including those not requiring collateral e.g. SEDCO), through various mediums (e.g. farmers magazines, radio programmers, etc).
	Provide training to small-scale producers/processors in terms of development of business plans
	Improve interaction between lending facilities (formal and informal), NGOs, and farmers to overcome negative perceptions of lending to small-scale sector.
Declining tourism industry (domestic and foreign tourists) Impact of the declining tourism industry and deteriorating economy	Encourage diversification into regional and international markets (hence meeting appropriate food standards) and/or linkages with ZIMTRADE and cross-border associations. Promote products processed by the small-scale indigenous sector on the domestic market.
	Encourage producer / processor to incorporate a budget line for market research and exhibitions to promote their products (annual ZITF, Agricultural Exhibition Show).
	Encourage contracting relationships between small- and large-scale processors, for the provision of intermediary and other inputs.
	Need for appropriate 'pricing strategies', 'market targeting' and market 'segmentation' by producers/processors.
Lack of available knowledge of food products produced by small-scale producers	Promotion of products from the small-scale sector through advertising, distribution of pamphlets in various institutions, displaying wares at exhibition shows (local and regional), demonstrations in formal retail outlets (e.g. supermarkets), websites and electronic media, information 'kiosks', etc.
	Improved organisation, networking and collaboration among small-scale processors to facilitate mutual benefits (economies of scale and more effective promotions, market products as a group, etc.)
	Promotion of own brands by small-scale sector enterprises to overcome overshadowing by large-scale companies.
	Use of food products in health and nutrition programmers as well as food relief work.
Lack of information about small-scale food processors	Development of a directory of small-scale producers/processors (including information on products processed)
	Promotion of products from the small-scale sector through advertising, distribution of pamphlets in various institutions, displaying wares at exhibition shows (local and regional), demonstrations in formal retail outlets (e.g. supermarkets), websites and electronic media, information 'kiosks', etc.
	Labelling according to food standards and regulations (incorporating full contact information).
Inability to provide varying quantities of products and inconsistent supply of products throughout the year	Adoption of suitable technologies (including research on crop varieties that ripen at different periods of year) and provision of adequate resources that enable continuous horticultural production (e.g. land access, water resources and irrigation, greenhouses)
	Formation of small-scale producer/processor associations to facilitate mutual benefits (purchase inputs, market products, facilitate access to cold storage, etc.)
	Construction of processing facilities close to source of raw materials to reduce losses
	Carry out consumer research in order to keep abreast of consumer requirements (package sizes, price, etc.).
Poor shelf life of products.	Use of suitable packaging materials that maximise shelf life of product (e.g. vacuum packing)
	Need for research and validation of effective methods of preservation (both traditional and commercial practices), and dissemination of such information among small-scale sector (including training and selection of appropriate preservatives)

	Improve methods of handling and storage, power networks (e.g. provision of electricity and diesel) and transportation systems to maximise shelf life of product.
	Support organizations assisting small-scale sector with distribution of products (e.g. provision of fuel)
Inability to comply with food safety standards and regulations	Encourage use of national food standards (e.g. Standards Association of Zimbabwe), and appropriate processing facilities among small-scale sector, whether as individuals or associations of processors (hence reducing cost of compliance) Good co-ordination of training programmers and dissemination of materials (e.g. Food Standards Act) relating to food safety and hygiene, food standards and use of chemicals in production/processing, by Ministry of Health and Child Welfare; AREX; Ministry of Trade, Industry and Commerce, etc.
	Good co-ordination of training programmers and dissemination of materials (e.g. Food Standards Act) relating to food safety and hygiene, food standards and use of chemicals in production/processing, by Ministry of Health and Child Welfare; AREX; Ministry of Trade, Industry and Commerce, etc.
	Greater enforcement among regulatory bodies of laws governing food safety and hygiene, food standards
Limited access to viable marketing channels	Development of training programmers catering to small-scale processors in product marketing, pricing, competition and marketing strategies; and improve access to necessary resources for marketing (e.g. access to computers and internet facilities)
	Market products (including 'exotic' indigenous foods and novel products) processed by small-scale sector at local and regional (local media, billboards, schools, information centres, etc.), and international level (e.g. websites). Highlight success stories of small-scale processors.
	Improve supply and quality of products (including packaging) in order to facilitate access to other markets (e.g. formal retail outlets)
	Establishment of joint ventures among small-scale processors, and also with large-scale sector to facilitate effective marketing of products.
	Improve communication and transport networks in rural areas (and access to fuel among NGOs and other organizations supporting small-scale sector in marketing of products). Regulatory authorities (e.g. ZRP) should facilitate ease of transportation of products
	Improve security at local and informal markets, to promote greater confidence among small-scale processors to sell products at such outlets.
Inability to use acceptable food labelling	Promote awareness and training among processors on issued related to product labelling, in particular Standards Association of Zimbabwe regulations on product labelling
	Provide assistance in developing and sourcing labels, including access to expertise in graphics and support from packaging companies in label design and manufacturing
	Encourage franchising to include use of labels

2.2 Discussion of the potential solutions identified

Lack of primary resources (land and water resources) and capital inputs

The majority of organisations interviewed felt that there was need for a review of the land tenure and water rights legislation to enable more small scale producer / processors to have access to land and water. Farmer organisations sighted an example the current situation were farmers in are not able to invest in capital projects without security of tenure.

Most technical and service providers suggested that producers and processors should form commodity associations that would enable them to have more access to large capital for equipment and production input purchases.

On the other hand, women organizations felt the need for affirmative action targeting women in capital allocation of project funding.

Research organizations felt most constraints faced by producers / processors could be solved through linkages with them.

Inadequate support from public departments and other organizations in terms of training (e.g. farm operation / production, processing, handling, marketing)

Most organizations interviewed were of the opinion that there is need for a coordinated and decentralized approach to training where there is integration of different institutions with different areas of specialization/expertise. An example was mentioned of the fact that currently training is done by two centers namely Silveira House and Ranche House, which are both within a close proximity of Harare.

Producers and processors felt that they should be the initiators of the training programmers for training programmers to be more relevant and that facilitators should be conversant in local languages and culture and should be able to have the right pitch or level. It was also felt that evaluation after training was crucial.

Unavailability and use of inappropriate technology processing techniques, handling of raw materials etc Knowledge on post harvest technology. Lack of appropriate storage facilities, e.g. cold storage for raw materials, semi processed products and processed products

The majority of producer / processor organisations interviewed suggested the need to encourage commodity associations to build processing plants that serve them as a group. One organization sighted an example of the honey project in Nyanga where a commodity association has successfully helped small-scale producers with knowledge and resources in their honey production activities.

An interesting solution suggested by some organizations was the concept of 'service processing' in which organizations with equipment can allow processors / producers without the appropriate equipment to use their equipment for a 'fee'.

Organizations like the Farmers Union felt research institutions like the Development Technology Centre, University of Zimbabwe and Non Governmental Organizations or companies that manufacture processing equipment (e.g. Tanrow Pvt Ltd) should be encouraged to showcase their technologies at village or ward levels.

Access to suitable packaging materials (e.g. glass bottles, plastic bottles, polythene bags, etc.) and packaging sizes (small, medium, large). And/or use of recycled packaging material (e.g. glass jars and plastics). Problems of hygiene and cleaning of recycled packaging materials

The majority of organisations interviewed were not fully aware of the contents and requirements of the Food Standards Act of Zimbabwe and suggested that the act be published and that copies be made available to producer/ processor organisations. Most felt that there was need for training in food legislation before enforcing it and that there should be continued interaction between law enforcement agencies/training institutions and producers/processors.

Members involved in the project identified the need for testing of water quality used by producer/processors though no organization mentioned it during the interviews.

The Zimbabwe Women's Bureau mentioned that through their various project activities they had noticed small-scale processors using residential buildings as processing plants, which they felt should be discouraged and was the main reason for food safety standards.

Lack of access to credit facilities

It was notable that the majority of organisations interviewed gave once again the idea of formation of commodity associations as the prime solution to the problem of lack of access to credit facilities. Access to credit as a group is viewed beneficial to small-scale horticultural production.

Farmer organisations however were of the idea of the formation of a 'land bank' that would lend money on the basis of using acquired land resources as collateral. They suggested that the government should work speedily to establish such a bank.

There was a general among producers / processors that currently most lending institutions shun small scale processors regards funding and only give short term finance packages which small scale processors consider inadequate and not ideal for their long term survival or production financing. Lending institutions should be encouraged to give 'long term' loans rather than the current short-term arrangements.

Some organisations also that lending institutions like SEDCO, which do not require collateral, should advertise their services more widely.

Members of the project team identified the need for co-ordination of efforts by credit providers to avoid duplication and gaps; none of the organizations interviewed mentioned this as a potential solution to the constraint of lack of access to credit facilities.

Declining tourism industry (domestic and foreign tourists) Impact of the declining tourism industry and deteriorating economy

Most organisations were in agreement of the need to diversify their product portfolios and target local and international markets as a solution to the mentioned constraint. Some felt that small-scale producers/processors could sell their products to established large-scale processors like in the example were Cairns Foods Pvt Ltd buys dried vegetables from small-scale producers.

One organization suggested the need to incorporate market research budgets in processors overall budgets that would enable use of funds in promotion activities by small-scale processors.

The majority of organizations interviewed were in agreement that there is need to link processors to potential buyers through exhibitions like the annual Zimbabwe International Trade Fair and Agricultural Exhibition Show.

Members of the project team identified a solution of the need for producers/processors to work as a group to benefit from 'economies of scale'.

Lack of available knowledge of food products produced by small-scale producers

Producer / processor organisations interviewed noted that currently big companies are using their brand names and labels on products produced by small-scale producers thereby shadowing exposure of small-scale producers. They felt the solution was in small-scale processors working as an organized group in product promotion work /programmers, to benefit from economies of scale and for effective promotion.

Some organizations felt the need for the public sector to popularize certain commodities on health and nutrition grounds.

One organization suggested that agencies that buy food products for food relief distribution should be encouraged to include food products produced by local small-scale producers.

Lack of information about small-scale food processors

Most solutions given were the same as those identified in 2.1.7 including the idea that agencies that buy food products for food relief distribution should be encouraged to include food products produced by local small-scale producers.

Inability to provide varying quantities of products and inconsistent supply of products throughout the year

Most organizations interviewed felt that there was need for small-scale producers/processors to group together and use group facilities with cold rooms for storage e.g. having joint ventures with large scale established companies as a solution to their inability to provide consistent supply of products throughout the year. Some suggested that small-scale processors should put up processing facilities close to sources of raw materials thereby reducing losses and extending processing seasons with an example given of mangoes that ripen at different times in different areas.

Some also indicated the need to reduce market glut by staggering production.

Poor shelf life of products

In general most organisations interviewed noted the need to promote good packaging of processed material. An example of the technique of vacuum packing was suggested. It was also felt there was need to encourage small-scale processors/producers to use appropriate preservatives

Inability to comply with food safety standards and regulations

Technical service providers, environmental health institutions and standards organisations all suggested the need for regulatory agencies to enforce laws pertaining to food standards. On the other hand producer / processor organizations felt there was need for adequate training in food safety and hygiene of producers/processors by extension agencies and by village health workers.

Some organisations felt that there was need for the Food Standards Act should be given as part of the package in training and business development and centralized processing through associations should be encouraged thereby promoting compliance with regulations/standards as a business unit. It was felt this would avoid individual compliance and costs.

Limited access to viable marketing channels

The overall solution of commodity associations was again raised as potential solution with most organisations suggesting that small-scale producers/processors should group and form an association that can then do marketing as a body.

A non-governmental organization called Jekesa Pfungwa / Vulinqondo suggested that small-scale processors and producers should use more effectively information centers available in NGOs like themselves.

Some suggested the need to exploit the export market and enable export of 'exotic' indigenous foods and exploration of regional and international markets targeting Zimbabweans in the Diaspora. It was also suggested that the media should be encouraged to highlight success stories of emerging small-scale producers/processors.

Inability to use acceptable food labelling

Most organisations felt the need for labeling issues to be raised during processor training and the need improve funding to enable processors to access graphics expertise and equipment.

Franchising was also suggested, as a solution in a situation was the processor did not have access to resources needed to produce quality labels.

2.3 CONCLUSIONS

The exercise identified potential solutions to the constraints raised in Phase II of the project as seen by various organisations including technical services providers, standards organisations, environmental health institutions, finance credit providers, non governmental organisations, research institutions and small scale producers / processors.

It was noted that for most of the constraints the main potential solution offered by various organisations interviewed was that of the need for producers/ processors to form commodity associations. This solution seems to be appropriate for the following constraints:

- 1 Lack of capital inputs.
- 2 Lack of appropriate storage facilities, e.g. cold storage for raw materials, semi-processed products and processed products.
- 3 Access to suitable packaging materials (e.g. glass bottles, plastic bottles, polythene bags, etc.) and packaging sizes (small, medium, large). And/or use of recycled packaging material (e.g. glass jars and plastics) Problems of hygiene and cleaning of recycled packaging materials
- 4 Lack of access to credit facilities.
- 5 Lack of information about small-scale food processors.

Other solutions offered address other constraints as given in 2.1. The potential solutions offered however cannot be said to be workable or feasible and neither can they be said to be adequate to address the needs of small-scale producers / processors of fruits and vegetables. An exercise to validate the potential solutions identified was therefore needed.

3 VALIDATION OF SOLUTIONS

3.1 Introduction

The work in Phase II included conducting a producer/processor survey with 294 cottage and micro-enterprises across three provinces of Zimbabwe, involved in processing dried fruit, dried vegetables and fruit preserves (i.e. jams, marmalade and jellies). The research also involved a consumer survey with 500 low-, middle- and high-income households in Harare, which focused on the purchasing and consumption patterns of the products indicated. It concluded with the identification of constraints to the production and marketing of processed horticultural products by small scale producers / processors (figure 1.1)

In the validation exercise in-depth interviews were held with a sub-sample (n=15) of small-scale producers/processors that participated in the formal survey carried out at the end of 2002.² The interviewees included representatives of the three study products (i.e. dried fruit, dried vegetables and fruit preserves). Given constraints faced by the project team in terms of sourcing fuel etc., interviewees were selected on the basis of their proximity to Harare. Again interviewees were contacted in advance and requested to participate in the exercise. All in all, the response from the sub-sample of small-scale producers/processors was very positive. Interviews were largely held at the production sites of the respective producers/processors. Most interviews lasted approximately 2 hours. Table 1.2 gives some details of the informants that participated in the validation exercise.

The interviews conducted to validate potential solutions followed a standard semi-structured interview schedule that was designed on the basis of results from the Identification of Potential Solutions Exercise conducted under the project. Appendix 2 provides a copy of the questionnaire used.

Information was compiled from the various interviews conducted and is presented in Table 3.1 below;

Table 3.1: Validation of the potential solutions identified

Identified Constraint	Solution Identified	Frequency	
		Solution workable (n=15)	Solution addresses producer / processor needs (n=15)
Lack of primary resources (land and water resources), and capital inputs.	Review current legislation governing access to water resources (issues of water rights)	12	9
	Development of low cost irrigation systems, and water harvesting techniques that are appropriate in a smallholder set-up.	14	13
	Review current land tenure system with a view to providing security of ownership (giving priority to small-scale (female) producers).	12	12

² Report 4.2 Report of producer/processor survey.

	Promote networks between small-scale producers/processors via formation of commodity associations, and other organizations to access inputs (e.g. raw materials, packaging materials, credit, etc.).	13	11
	Promote linkages between producers and research and development institutions and other organizations in order to improve access to resources (e.g. seeds, agro-chemicals, processing technologies).	14	14
Inadequate support from public departments and other organizations in terms of training (e.g. farm operation/ production, processing, handling, marketing).	Need for coordinated decentralized approach to the provision of training. This may include involvement of expert trainers, but also recognition/adapting of local indigenous knowledge (e.g. producer-producer or farmer-farmer training programmers). Such trainers should be based in local communities (i.e. exposing them to the needs of beneficiaries) and conversant in local languages.	13	10
	More effective promotion of training programmers available (e.g. via local agricultural shows, exchange visits, and attachments to research and training institutions) and identification of potential beneficiaries (i.e. those already involved in production and therefore with greater access to raw materials).	15	15
	Development of appropriate training courses (both formal and informal), which are open to monitoring and evaluation by all stakeholders involved.	15	12
Unavailability and use of 'inappropriate' technology: processing techniques, handling of raw materials, etc. Knowledge of post-harvest technology. Lack of appropriate storage facilities, e.g. cold storage for raw materials, semi-processed products and processed products Access to suitable packaging materials (e.g. glass bottles, plastic bottles, polythene bags, etc.) and packaging sizes (small, medium,	Encourage co-operative or commodity associations to build processing plants that serve them as a group, and/or the promotion of 'service processing' centres.	15	10
	Create local fora and platforms for sharing information. For example, outreach programmers showcasing technologies at village/ward level. Furthermore, promote producer-producer, processor-processor initiatives concerning local knowledge of 'appropriate' technologies.	15	13
	Encourage R&D of 'appropriate' processing equipment/technologies	14	13
	Improve co-ordination among stakeholders (e.g. Ministry of Health, Standards Association of Zimbabwe, Government Analyst, Institute of Food, Nutrition and Family Sciences, etc.) in order to provide appropriate information training and knowledge of food law and food safety issues, with particular focus on small-scale producer/processor operations.	14	13
	Effective enforcement of food standards and regulations, and monitoring of facilities used for processing food products	9	7
	Further R&D initiatives concerning alternative packaging materials (e.g. sachets for jam making), and feasibility (e.g. establishment of small-scale recycling plants) of recycled packaging materials.	12	12
	Routine examination and quality control of raw materials, including water.	11	11
Lack of access to credit facilities	Improving access to long-term credit facilities, both formal (e.g. revolving funds, 'land banks' sensitive to farmer credit needs) and informal (e.g. micro credit schemes offered by NGOs, women's organizations or other groups setting up 'borrowers' groups), for both producers and processors.	11	10
	Greater provision of information on sources of funding (formal and informal sources, including those not requiring collateral e.g. SEDCO), through various mediums (e.g. farmers magazines, radio programmers, etc).	12	11

	Provide training to small-scale producers/processors in terms of development of business plans	14	12
	Improve interaction between lending facilities (formal and informal), NGOs, and farmers to overcome negative perceptions of lending to small-scale sector.	13	12
Declining tourism industry (domestic and foreign tourists) impact of the declining tourism industry and deteriorating economy	Encourage diversification into regional and international markets (hence meeting appropriate food standards) and/or linkages with ZIMTRADE and cross-border associations. Promote products processed by the small-scale indigenous sector on the domestic market.	15	11
	Encourage producer / processor to incorporate a budget line for market research and exhibitions to promote their products (annual ZITF, Agricultural Exhibition Show).	13	9
	Encourage contracting relationships between small- and large-scale processors, for the provision of intermediary and other inputs.	11	9
	Need for appropriate 'pricing strategies', 'market targeting' and market 'segmentation' by producers/processors.	9	7
Lack of available knowledge of food products produced by small-scale producers	Promotion of products from the small-scale sector through advertising, distribution of pamphlets in various institutions, displaying wares at exhibition shows (local and regional), demonstrations in formal retail outlets (e.g. supermarkets), websites and electronic media, information 'kiosks', etc.	14	11
	Improved organisation, networking and collaboration among small-scale processors to facilitate mutual benefits (economies of scale and more effective promotions, market products as a group, etc.)	9	9
	Promotion of own brands by small-scale sector enterprises to overcome overshadowing by large-scale companies.	13	12
	Use of food products in health and nutrition programmes as well as food relief work.	14	14
Lack of information about small-scale food processors	Development of a directory of small-scale producers/processors (including information on products processed)	15	13
	Promotion of products from the small-scale sector through advertising, distribution of pamphlets in various institutions, displaying wares at exhibition shows (local and regional), demonstrations in formal retail outlets (e.g. supermarkets), websites and electronic media, information 'kiosks', etc.	14	11
	Labeling according to food standards and regulations (incorporating full contact information).	15	15
Inability to provide varying quantities of products and inconsistent supply of products throughout the year	Adoption of suitable technologies (including research on crop varieties that ripen at different periods of year) and provision of adequate resources that enable continuous horticultural production (e.g. land access, water resources and irrigation, greenhouses)	15	14
	Formation of small-scale producer/processor associations to facilitate mutual benefits (purchase inputs, market products, facilitate access to cold storage, etc.)	13	12
	Construction of processing facilities close to source of raw materials to reduce losses	12	11
	Carry out consumer research in order to keep abreast of consumer requirements (package sizes, price, etc.)	14	14
Poor shelf life of products.	Use of suitable packaging materials that maximise shelf life of product (e.g. vacuum packing)	14	14

	Need for research and validation of effective methods of preservation (both traditional and commercial practices), and dissemination of such information among small-scale sector (including training and selection of appropriate preservatives)	15	14
	Improve methods of handling and storage, power networks (e.g. provision of electricity and diesel) and transportation systems to maximise shelf life of product.	15	11
	Support organizations assisting small-scale sector with distribution of products (e.g. provision of fuel)	14	9
Inability to comply with food safety standards and regulations	Encourage use of national food standards (e.g. Standards Association of Zimbabwe), and appropriate processing facilities among small-scale sector; whether as individuals or associations of processors (hence reducing cost of compliance) Good co-ordination of training programmers and dissemination of materials (e.g. Food Standards Act) relating to food safety and hygiene, food standards and use of chemicals in production/processing, by Ministry of Health and Child Welfare; AREX; Ministry of Trade, Industry and Commerce, etc.	15	14
	Good co-ordination of training programmers and dissemination of materials (e.g. Food Standards Act) relating to food safety and hygiene, food standards and use of chemicals in production/processing, by Ministry of Health and Child Welfare; AREX; Ministry of Trade, Industry and Commerce, etc.	14	14
	Greater enforcement among regulatory bodies of laws governing food safety and hygiene, food standards	9	9
Limited access to viable marketing channels	Development of training programmers catering to small-scale processors in product marketing, pricing, competition and marketing strategies; and improve access to necessary resources for marketing (e.g. access to computers and internet facilities)	14	13
	Market products (including 'exotic' indigenous foods and novel products) processed by small-scale sector at local and regional (local media, billboards, schools, information centres, etc.), and international level (e.g. websites). Highlight success stories of small-scale processors.	12	10
	Improve supply and quality of products (including packaging) in order to facilitate access to other markets (e.g. formal retail outlets)	15	13
	Establishment of joint ventures among small-scale processors, and also with large-scale sector to facilitate effective marketing of products.	11	10
	Improve communication and transport networks in rural areas (and access to fuel among NGOs and other organizations supporting small-scale sector in marketing of products). Regulatory authorities (e.g. ZRP) should facilitate ease of transportation of products	13	11
	Improve security at local and informal markets, to promote greater confidence among small-scale processors to sell products at such outlets.	11	8
Inability to use acceptable food labelling	Promote awareness and training among processors on issues related to product labelling, in particular Standards Association of Zimbabwe regulations on product labelling	15	14
	Provide assistance in developing and sourcing labels, including access to expertise in graphics and support from packaging companies in label design and manufacturing	14	13
	Encourage franchising to include use of labels	11	10

3.2 Discussion of the Validation of Solutions

Lack of primary resources (land and water resources) and capital inputs.

The validation of solutions to this constraint revealed that the solution of 'reviewing current legislation governing access to water resources (issues of water rights)' was workable (12) but just more than half of those interviewed (9) said this solution did not adequately address the needs of most small scale processors. This is presumably because some do not perceive the need to having their own water source or have an existing water source already in place.

The other solutions to the constraints were considered workable and adequately addressing the needs of the small-scale processors.

Inadequate support from public departments and other organizations in terms of training (e.g. farm operation / production, processing, handling, marketing)

All the solutions given for this constraint were validated as workable and adequately addressing the needs of the small-scale producer/ processor.

Most processors interviewed said they could gain more knowledge from training and felt strongly that training should be decentralized.

Unavailability and use of inappropriate technology processing techniques, handling of raw materials etc Knowledge on post harvest technology. Lack of appropriate storage facilities, e.g. cold storage for raw materials, semi processed products and processed products

Just more than half (9) of those interviewed said that the solution of 'effective enforcement of food standards and regulations, and monitoring of facilities used for processing food products' was workable whilst less than half (7) said that this solution did not adequately address their needs as small scale producers / processors. Most of those interviewed apparently felt that 'enforcement' could mean that their facilities could face the risk of closure due to inspections and strict adherence to regulations hence their feeling that this solution was generally unworkable.

The rest of the solutions were validated as workable and adequately addressing the needs of the small-scale producer / processor.

Access to suitable packaging materials (e.g. glass bottles, plastic bottles, polythene bags, etc.) and packaging sizes (small, medium, large). And/or use of recycled packaging material (e.g. glass jars and plastics). Problems of hygiene and cleaning of recycled packaging materials

All the solutions given for this constraint were validated as workable and adequately addressing the needs of the small-scale producer/ processor.

Lack of access to credit facilities

All the solutions given for this constraint were validated as workable and adequately addressing the needs of the small-scale producer/ processor.

Declining tourism industry (domestic and foreign tourists) Impact of the declining tourism industry and deteriorating economy

Although most interviewees felt that the solution of *'Encouraging producer / processor to incorporate a budget line for market research and exhibitions to promote their products (annual ZITF, Agricultural Exhibition Show)'* was workable (13) just more than half (9) of those interviewed felt that this solution adequately addressed their needs. This could be attributed to the fact that most felt this could inflate their budgets and overall expenditures.

The solution of *'Encouraging contracting relationships between small- and large-scale processors, for the provision of intermediary and other inputs'* was generally regarded as workable (11) whilst just more than half (9) felt that this did not adequately address their needs as small scale processors. The general feeling was that large-scale processors could easily overshadow them and offer them small earnings while they make huge profits.

The solution of *'Need for appropriate 'pricing strategies', 'market targeting' and market 'segmentation' by producers/processors'* was regarded workable by just over half of the interviewees (9) whilst less than half said this solution did not adequately address their needs.

The solution of *'Improved organisation, networking and collaboration among small-scale processors to facilitate mutual benefits (economies of scale and more effective promotions, market products as a group, etc.)'* was regarded workable by just over half of those interviewed (9) and said to adequately address the needs of small scale processors by over half (9) of those interviewed. Those interviewed felt that collaboration and networking for mutual benefits could result in corrupt tendencies and prejudice of earnings to 'small' players. Most feared being overshadowed in the process.

The rest of the solutions were validated as and adequately address the needs of the small-scale producer / processor.

Lack of available knowledge of food products produced by small-scale producers

All the solutions given for this constraint were validated and adequately address the needs of the small-scale producer/ processor.

Lack of information about small-scale food processors

All the solutions given for this constraint were validated and adequately address the needs of the small-scale producer/ processor.

Inability to provide varying quantities of products and inconsistent supply of products throughout the year

All the solutions given for this constraint were validated and adequately address the needs of the small-scale producer/ processor.

Poor shelf life of products

The solution of *'Support organizations assisting small-scale sector with distribution of products (e.g. provision of fuel'* was found to be workable by most interviewees (14) but just more than half (9) said it adequately addressed their needs as small scale processors.

The rest of the solutions were validated and adequately address the needs of the small-scale producer / processor.

Inability to comply with food safety standards and regulations

The solution of *'Greater enforcement among regulatory bodies of laws governing food safety and hygiene, food standards'* was regarded workable by just over half (9) of those interviewed and just over half (9) felt this solution adequately addressed their needs as small scale processors. As in the validation of one of the solutions to constraint 3, most of those interviewed apparently felt that 'greater enforcement' could mean that their facilities could face the risk of closure due to inspections and strict adherence to regulations

The rest of the solutions were validated and adequately address the needs of the small-scale producer / processor.

Limited access to viable marketing channels

The majority of those interviewed (11) said that the solution of *'Improve security at local and informal markets, to promote greater confidence among small-scale processors to sell products at such outlets'* was workable but just over half (8) felt this solution adequately addressed their needs as small scale processors

The rest of the solutions were validated and adequately address the needs of the small-scale producer / processor.

Inability to use acceptable food labelling

All the solutions given for this constraint were validated and adequately address the needs of the small-scale producer/ processor.

3.3 Conclusions

The validation of solutions exercise revealed that of the 50 solutions given for the various constraints identified, 48 were validated as workable and adequately addressing the needs of small scale processors of fruits and vegetables. Only 2 solutions were not considered valid by those small-scale processors interviewed in the validation exercise. It is therefore concluded that the 48 solutions validated can be the basis for formulation of policies and recommendations that enable improved production and marketing of food products by the small-scale sector.

**APPENDIX 1. SEMI-STRUCTURED INTERVIEW SCHEDULE FOR
'IDENTIFICATION OF POTENTIAL SOLUTIONS**

DFID-CPHP Project R7485

Facilitating the effective production and marketing of processed food products by small-scale producers in Zimbabwe

Phase III

Activity 1a. Consultation with providers of technical assistance, policy-makers and producer/processor organisations to identify solutions to constraints highlighted

Date: _____

Interview Time: _____

Venue of Interview: _____

Name of Interviewee: _____

Organisation: _____

Interviewers: _____

Brief Background of the Organisation:

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List of Constraints identified

<p>Question 1 The survey conducted identified - <i>Lack of production resources, land, water resources, and capital inputs</i>; as one of the constraints in production and marketing of products produced by the small-scale sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>
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List of Constraints identified (Continued)

<p>Question 2 The survey conducted identified - <i>Inadequate support from the public departments and other organisations in terms of training – farm operation / production, processing, handling, marketing;</i> as one of the constraints in production and marketing of products produced by the small-scale sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>
<p>Question 3 The survey conducted identified- <i>Unavailability and use of 'appropriate' technology; processing techniques; handling of raw materials; knowledge on post-harvest technology;</i> as one of the constraints in production and marketing of products produced by the small-scale sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>
<p>Question 4 The survey conducted identified- <i>Problems of hygiene and cleaning of recycled packaging material;</i> as one of the constraints in production and marketing of products produced by the small-scale sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>
<p>Question 5 The survey conducted identified - <i>Lack of access to credit facilities;</i> as one of the constraints in production and marketing of products produced by the small-scale sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>
<p>Question 6 The survey conducted identified - <i>Impact of the declining tourism industry and the deteriorating economy;</i> as one of the constraints in production and marketing of products produced by the small-scale sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>
<p>Question 7 The survey conducted identified <i>Lack of available knowledge of food products produced by the small-scale sector;</i> as one of the constraints in production and marketing of products produced by the small-scale sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>

List of Constraints identified (Continued)

<p>Question 8 The survey conducted identified <i>Lack of information about small-scale food processors</i>; as one of the constraints in production and marketing of products produced by the small-sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>
<p>Question 9 The survey conducted identified <i>Inability to provide varying quantities of products and the consistent supply of the products throughout the year</i>; as one of the constraints in production and marketing of products produced by the small-scale sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>
<p>Question 10 The survey conducted identified <i>Shorter shelf life of products</i>; as one of the constraints in production and marketing of products produced by the small-sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>
<p>Question 11 The survey conducted identified <i>Inability to comply with food safety standards and regulations</i>; as one of the constraints in production and marketing of products produced by the small-scale sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>
<p>Question 12 The survey conducted identified <i>Limited access to viable marketing channels</i>; as one of the constraints in production and marketing of products produced by the small-scale sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>
<p>Question 13 The survey conducted identified <i>Inability to use acceptable food labelling</i>; as one of the constraints in production and marketing of products produced by the small-sector in Zimbabwe.</p>	<p>What do you consider, as an organisation, the potential solutions to the identified constraints?</p>