

Namibia: Trends in growth of modern retail and wholesale chains and related agribusiness

Context

This policy brief forms part of the Recovering Markets study in Southern Africa. It has endeavored to analyse market concentration in the food processing and retail sectors, as well as to predict future dynamics in the sectors which have emerged as a result of the restructuring of the food market and the rapid changes taking place in the structure and governance of local, national and regional agri-food markets and the implications of the changes for small/medium producers in the restructuring of the food industry, together with the implications for policies and programmes within the context of the agri-food market.

Key points

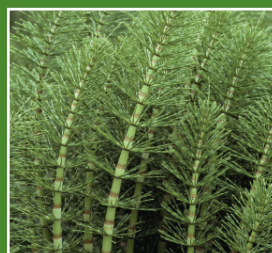
The agri-food system in Namibia is changing due to increased FDI by South African supermarkets. There has been a rapid increase in the number of supermarkets in food retail in Namibia. This has resulted in increased consolidation in the food retail sector. Supermarkets source fresh fruit and vegetables (FFV) from South Africa and from local producers. Locally, supermarkets procure FFV from specialised wholesalers, specialised sourcing companies and directly from large scale farmers.

Currently, small scale farmers are excluded from the FFV supply chain of supermarkets in Namibia. Beef products for export are subject to stringent sanitary, food quality and safety standards. These food quality standards might act as barriers to trade for small scale producers.

Approximately 98% of processed food products sold in supermarkets in Namibia are imported from South Africa. The Namibian food processing sector is underdeveloped compared to South Africa. Small scale food processors in Namibia are not able to access South African and local chain supermarkets supply chains for processed food products. Public policy intervention in the FFV sector has not been able to facilitate supermarkets to source from small scale farmers in Namibia. There is need for a holistic approach to link small scale farmers to the changing markets.



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA



About Namibia

Namibia covers 824 000 sq. km and is situated in the south west of Africa, bordered by the Atlantic Ocean on the west, Angola and Zambia to the north, Botswana to the east and the Republic of South Africa to the south.. It has one of the lowest population densities in the world (2 people per sq. km). However, the population distribution shows a wide variation within the country mainly influenced by the availability of water. Rural populations are concentrated around perennial rivers which form the country's northern borders, around seasonal rivers and flood plains and along pipelines and water systems such as the Eastern National Water Carrier, which supplies residents in the dry areas in eastern and central Namibia. Namibia had a Gross Domestic Product (GDP) of US\$ 6 372million and a per capita GDP growth rate of 3.6% in 2006. In 2006, it had a total population of 2 million and 69% of Namibia's population was rural. However, there is an increasing urbanisation trend (23 % in 1991 to 33% in 2004). Urban populations have been growing at 5.4 % per year since 1991 (Republic of Namibia, 2002; World Bank, 2007).

Agriculture in Namibia

Agriculture in Namibia is a relatively important economic sector. Although it contributes only around 6 percent to GDP, it employs 37 percent of the work force and communal farmers represent 70 percent of the population. This means that close to 80% of the population of Namibia derived at least a part of their livelihood from agriculture and forestry in 1994 (MeatCo, 2007). The Namibian agriculture sector can be categorised into commercial and communal sectors. The commercial farming sector consists of approximately 4 200 farmers and enterprises and controls 44% of agriculturally useable land. The communal farming sector occupies 41% of the agricultural land and accommodates approximately 67% of the Namibian population of which an estimated 90% are dependent on subsistence agriculture for a living. The racially biased land policies have greatly skewed population distribution. In the south and east, people were removed, by war or apartheid practices, to marginal areas. These policies ensured that settlers owned the superior grazing land in the central areas. This has created a dualistic agricultural system: on the one hand

black subsistence farming, in which women constitute the majority of producers and on the other white commercial farming, in which black farm workers provide the bulk of labour (Uvanga & Dempers, 2006).

The agri-food system in Namibia consists of primary producers, food processors, importers, wholesalers and retailers. Food retail consists of the modern (formal) and traditional (informal) food sectors. The formal food retail sector consists of wholesalers, supermarkets and local shops (general dealers). The informal sector in Namibia remains small with about 70 to 90% providing services (Van der Linden, 1993). The Namibian economy is highly formalised and highly integrated into the South African economy. This could be due to historical factors as Namibia was colonised by South Africa and was run as a fifth province of South Africa for many years before attaining its independence in 1990. Therefore, the formal sector is dominated by South African firms. The colonial legacies are still visible today as Namibia is characterised by huge socio-economic inequalities that are largely a reflection of its colonial apartheid history, but also because of the class stratification that has taken place since independence (Jauch, 2004). Due to its colonial legacy, South African firms, including supermarkets, have a firm foothold in Namibia and the presence of these firms have continued to increase owing to favourable foreign direct investment policies pursued since independence.

The agri-food system is changing due to factors both internal and external to Namibia such as market and trade reforms. Privatisation programmes undertaken by the Namibian government have facilitated the entry of foreign firms into various sectors of the Namibian economy. Liberalisation of foreign direct investment policies have also facilitated investment by foreign firms including supermarkets in the food processing, wholesale and retail. Supermarkets have expanded in the urban areas as well as in the rural areas. The rapid growth and expansion of supermarkets in Namibia could be attributed to demand and supply factors. Demand factors include increased urbanisation, growth in income and increased middle income class, and changing consumer tastes and

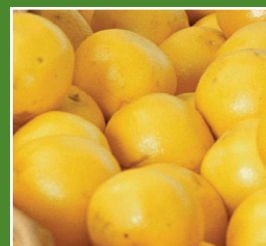
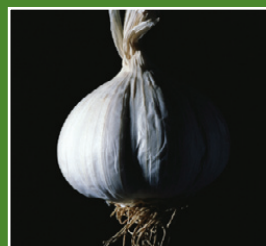


Table 1: Supermarkets (selling food products) in Namibia in 2005

Supermarket Name	Number of stores	Urban (Windhoek)	Other urban and/ Rural towns	Origin
Spar	23	5	18	South Africa
Shoprite	48	10	38	South Africa
Pick 'n Pay	9	4	5	South Africa
Woolworths	5	1	4	South Africa
Woerman & Brock	15	11	4	Namibia
Fruit and Veg City	3	2	1	South Africa
Independent supermarkets/ convenience stores	many	many	many	Namibia

Source: Emongor (2007)

preferences. Supply factors include trade and market liberalisation (privatisation programmes), favourable domestic policies (export processing zones), political stability and regional integration.

Currently there are foreign supermarkets (mainly South African), such as Shoprite, Pick 'n Pay, Spar, Woolworths, as well as local chain supermarkets such as Woermann Brock, independent supermarkets and convenience stores located in filling stations (Emongor, 2007). These supermarkets are spread out in Windhoek and its suburbs, in major and rural towns (Table 1).

The share of supermarkets in food retail in Namibia is between 50% and 60% (Weatherspoon & Reardon, 2003). The formal sector (supermarkets) have expanded by buying out smaller independent supermarkets and stores, therefore the traditional retail sector has been shrinking. This implies that the formal food retail sector in Namibia is becoming more concentrated as a few large firms (wholesale and retail) expand in the country. According to one respondent "there is formation of partnerships between large South African retailers and smaller local independent supermarkets. Very few independent stores are now left. Larger is getting larger." Supermarkets have been able to grow and increase their market share as consumers prefer the convenience of one stop shopping and other advantages (such as lower prices) (Emongor, 2007).

Implications of market changes to procurement practices

The FFV supply chain consists of producers (large and small scale farmers), specialised FFV wholesalers, supermarkets, local informal markets and consumers. The horticultural industry in Namibia is still in its infancy. The total amount of FFV demanded of about N\$ 195.4 million in real terms is realised through local production (approximately 20%) and the remaining 80% is imported from South Africa. Most FFV is imported because of unfavourable environmental

factors such as low and unreliable rainfall and high evapo-transpiration rate making rain-fed crop production erratic. Irrigation agriculture is also underdeveloped mainly due to water scarcity. Owing to these factors FFV production is limited to areas in the country with reasonable annual rainfall of between 300-700mm in the north and south of the country. Production areas in the north support smallholder systems where production is for subsistence. Farmers in the northern region engaged in mixed farming, produce field crops such as mahangu (millet), maize, sorghum and horticulture crops, cattle and goats for subsistence purposes (Schade et al., 2000; Republic of Namibia, 2002). The surplus products are being sold to neighbours due to lack of markets for fresh produce.

Fresh fruit and vegetable production faces constraints even on large scale farms because of limited water availability and government's water use policy which restricts the acreage of land that can be irrigated by an individual farmer to about one hectare unless a permit to irrigate more land has been obtained. This implies that even many large scale farms are constrained with respect to production capacity and hence are forced to pool production volumes. High transaction costs (cost of transportation of produce from production to consumption areas) and cold chain requirements may discourage farmers from participating in the supermarket supply chain. Owing to the foregoing reasons, the current FFV



supply chain of supermarkets and wholesalers excludes small scale producers. The FFV supply chain of most supermarkets was through wholesalers (both traditional and specialised) such as Freshmark sourcing for Shoprite and Freshco sourcing for Pick 'n Pay. The wholesalers import their products from South Africa and when sourcing is done locally, procurement is from large preferred suppliers who can supply produce in terms of quantity and quality throughout the year. For example, Freshmark sources 95% of FFV from South Africa, and thus only five percent from Namibia (Emongor, 2007).

Beef production is the most important livestock related activity, followed by small stock (sheep and goat) production. Agriculture contributes 6% to GDP of which livestock production contributes 75%. Cattle are produced in the commercial and communal sectors. The commercial farming sector is well developed, capital intensive and export oriented. Commercial area livestock production accounts for 69% of national agricultural output (Republic of Namibia, 2002) and comes from 44% of the farming/ grazing land. Approximately 62% of cattle are owned by farmers in the communal sector but these farmers are subsistence oriented and do not regularly sell cattle (Schade et al, 2000). The reasons for the infrequent sales of cattle are linked to tradition which value cattle as an asset in itself and not in monetary terms. The wealth of the farmer is measured in terms of the number of cattle and not the amount of cash the farmer has in the bank (Schade et al, 2000). Compounding this is the price expectation of farmers. Farmers consider prices offered by MeatCo¹ to be too low (N\$900-N\$1,200) compared to local open market prices of (N\$1500-N\$2,200) which are much higher (Schade et al, 2000). Even though the local market channel offers better prices, the local market demand for cattle is low and therefore the capacity to absorb all cattle available for sale is low. Apart from low prices other factors also contribute to the communal farmers' choice of market channel such as the quarantine requirement of MeatCo of 21 days which farmers perceive to be costly and entails lower body weight after this period (Schade et al, 2000).

Cattle numbers in Namibia have shown an increasing trend since 1996. Beef and veal production and export has also shown an increasing trend. The exports of live cattle have shown a declining trend. Currently, Namibia enjoys a beef export quota of 13,000 ton to the European Union under the EU/ACP trade agreement. The EU market accounts for 40% of Namibia's beef product exports. From 1991-1998, Namibia has not utilized its full beef quota to the EU market. This could be attributed to supply constraints (drought, disease outbreaks), high phyto-sanitary requirements of the EU market and conversion of some commercial ranches into game ranches for tourism purposes.

The beef supply chain consists of producers (commercial and communal), beef processors (MeatCo), export abattoirs, local butchers, supermarkets and exporters (beef and live cattle). Cattle are marketed through the export abattoirs (45.3%), local butchers (11.4%) and live cattle exports to South Africa (43.3%) as reported in the second National Development Plan (Republic of Namibia, 2002). Supermarkets source their beef products from local suppliers and processors. For example, Woerman & Brock source canned beef from MeatCo and fresh meat from Ilulu Beef (a wholesaler). Fresh meat is packed locally and supplied to chain supermarkets and other institutional buyers.

The food and beverages subsector is the largest subsector in manufacturing. It contributes 8.2% to total manufacturing GDP and employs 32.6% of all labour in manufacturing. The food and beverages processing sector in Namibia consists of three downstream sectors, namely meat processing, fish processing, and the manufacture of other foods and beverages (Republic of Namibia, 2002). Compared to South Africa, the food manufacturing/processing sector in Namibia is underdeveloped (Emongor, 2007).

Approximately 98% of most processed food products were sourced from South Africa (Emongor, 2007). The exception were products produced by companies protected under the Infant Industry Protection Act, such as dairy processing and grain milling and those products where Namibia has

¹ MeatCo is the largest private meat processor in Namibia with abattoirs and beef processing units suitable for regional and international export standards



a comparative advantage such as meat and fish products. The sourcing pattern for processed food products could be attributed to the fact that South Africa has a well developed food manufacturing/processing sector consisting of a number of large multinational firms such as Unilever, Nestlé, Danone, Kellogg, HJ Heinz, McCain Foods etc and large domestic South African firms such as Tiger Brands, National Brands, Premier Foods etc. These large multinational firms have developed powerful brands, which they support in terms of advertising and therefore are well known to consumers in Namibia. These firms' brands are found in most supermarkets. Local food processing companies are small and do not have the capacity to advertise their products. They also lack the capacity to support them in terms of merchandising and chain supermarket requirements. Therefore, the products produced by small scale firms do not access the chain supermarkets. Small scale firms market their products through the traditional channels (local shops and independent supermarkets).

The Namibian **dairy** industry is still in its infancy. The dairy supply chain consists of producers (large scale), processors (1), wholesalers, supermarkets and the traditional channel. Dairy production is mainly carried out on large scale farms (Emongor, 2007). There is one main dairy processor, namely Namibia Dairies, which was formed in 1997 through the merger of Bonmilk and Rietfontein Dairies. Namibia Dairies have processing plants in Windhoek and Rietfontein in the north. This firm is not able to meet the demand for dairy products in Namibia. Domestic milk production is insufficient to meet domestic demand and more than 25 000 ton of milk equivalents are imported annually.

Grain milled products such as wheat and maize flour are sourced locally from the only large milling company namely Namib Mills. The milling company is protected by an imposition of a total ban on flour imports into Namibia. Namib Mills is involved in the milling of maize, wheat, traditional cereals (mahangu) and making pasta. Protective measures enabled Namib Mills to improve production of maize. Traditional crops such as sorghum and millets are processed by small scale millers which

number between nine and thirteen. The small scale millers mainly market through the traditional channels.

Regional and international markets and linkages with national channels

The Namibian economy heavily depends on trade. Changes in the agri-food systems are driven by globalisation, market and trade liberalisation and regional integration. Namibia is a member of two regional groupings, namely the Southern African Customs Union (SACU) and Southern African Development Community (SADC). All members (except Republic of South Africa) of these two economic blocks belong to the African Caribbean and Pacific States (ACP) group and are members of the Cotonou Agreement. The Cotonou Agreement grants the former European colonies preferential and non-reciprocal access to the European markets. Through this arrangement Namibia's basic mineral exports are allowed duty free access to the EU markets. These exports account for 25% of Namibian exports.

Beef and fisheries products considered to be sensitive by EU importing countries are subject to stringent sanitary, food quality and safety standards which since January 2007 may include animal welfare standards. These standards may act as barriers to trade especially to small scale cattle producers' access to export markets.

Namibia, being a SACU member, is automatically part of the Trade Development and Co-operation (TDCA) between South Africa and EU which was signed in 2000. The TDCA automatically locked the BLNS (Botswana, Lesotho, Namibia and Swaziland) countries into South Africa's liberalisation schedule with the EU, which these countries have to implement. The TDCA allows unrestricted access of EU goods into SACU, so local producers, manufacturers and service providers will face competition from European imports and companies. This may have both positive and negative impacts on these countries. Positive impacts include cheap imports from EU countries to SACU countries. On the other hand SACU and Southern African countries may face substantial revenue losses and increased competition for several products such as poultry, dairy



Table 2: Product categories found on supermarket shelves/local shops and their sources in Windhoek, Namibia (2005)

Type of product	Country	Namibia
Processed food products	Source (origin) of products	% of brands on supermarket shelves
Frozen vegetables (mixed vegetables, peas, potato chips)	South Africa ROW	90 * 10
Tomato sauces	South Africa	100
Fruit juices (100%)	South Africa	100
Milled products (wheat flour, maize flour)	Namibia	100
Canned vegetables	South Africa	100
Canned fruits	South Africa	100
Pasteurised milk	Namibia	100

* the percentages were calculated by taking into account the number of brands available across sampled supermarkets/local shops *Source: Emongor, 2007*

products, flour based products, canned fruit and jam, and sugar based products. Subsidised agricultural products from EU countries compete with unsubsidized SACU and SADC countries products. Subsidised agricultural products may undermine the livelihoods of poor and small scale farmers, distort trade and lead to depressed prices and result in dumping of cheap Subsidised products on the SACU market. These developments are a great challenge to the agricultural sectors of these countries on which the majority of the population depend.

Government policies and support

Policy and support framework for the agriculture sector is guided by the National Agricultural Policy paper of 1995 (Republic of Namibia, 1995). The objectives of the agriculture policy are to increase agricultural productivity and income, ensure food self-sufficiency and security, and promote sustainable utilisation of land and other natural resources, and to achieve a balanced rural and regional development based on comparative advantage.

To improve horticultural production the Government of Namibia initiated the National Horticultural Development Initiative (NHDI) of 2004 (Republic of Namibia, 2004). The

NHDI aims to promote production and marketing of fruit and vegetables and other horticultural crops in order to improve food self-sufficiency and security, import substitution, stimulate exports of FFV, employment creation and processing/industrial development (Republic of Namibia, 2005). Through the NHDI's two programmes, namely the green scheme and the development and implementation of fresh produce co-ordination and marketing structure in Namibia, a central FFV market in Windhoek and district markets in Oshakati and other producing areas is planned (Republic of Namibia, 2004). Actions that could also be undertaken to help the informal and small scale sector sell and link with these markets include the allocation of space for small traders – differentiated charges, technical support, help with group formation, etc.

The government took services formerly limited to those in the private-tenure farming areas more widely to producers in communal-tenure areas. Various programmes were undertaken to improve communal farmers' access to production inputs such as Draught Animal Power Programme, and subsidised and loan guarantee financial schemes through the Agribank. Notable among the financial schemes are the National Agricultural Credit Schemes, Affirmative Loan Schemes and the North-South Incentive Scheme aimed at emerging farmers in the communal areas. To improve food security and nutrition, the government established the Food Security and Nutrition Development programme.

The government of Namibia also intervenes in the agricultural sector by setting trade policies that protect infant industries such as dairy and milling. For the horticultural sector, a content requirement (5% of produce be sourced locally) has facilitated specialised FFV wholesalers such as Freshco Namibia and Freshmark to develop a local supplier base, even though local sourcing is currently limited to large scale farms. The impacts of these trade policies in the agricultural sector need to be further investigated especially in face of emerging regionalisation in Southern Africa.

Policy makers need to understand the dynamics, given current policy, of the drivers of market restructuring (global,



national, local) and their impact on smallholders as well as on the wider rural economy (poverty). To achieve this there is need to professionalise the civil service to provide market based services (or support their provision by third parties) as public policy can affect outcomes positively or negatively, intended or unintended. Policy makers need to coordinate to ensure that essential institutional conditions are in place for all. Government needs to provide a conducive policy environment that is, macroeconomic stability, political stability, focus on pro-poor policies (equitable policy focus), predictable/open trade policy including no import/export bans and non-interference in markets. Governments should provide institutional support to core public goods services and develop methods of managing risk of compromising food security and livelihoods. However, there are a number of potential public policy pitfalls that policy makers should guard against (Proctor, 2007).

Emerging implications for small scale producers and opportunities for public and private sector intervention

The foundation of sustainable success requires organisation at producer level, receptive business and enabling public policy that is facilitated effectively. The sustainability of change is more likely to be achieved by enabling agents (e.g. NGOs) who work on helping people in the value chain players rather than play a functional market transaction role. Donors need to rethink the critical areas of investment to support producer inclusion in dynamic markets as rash donor investments may cause distortions and waste resources. The facilitation of market chain actors, building vertical integration and reduction of transaction costs is integral to build capacity of market chain actors. Although, the private sector is under-utilised as a partner in development, it should be noted that public and private policy makers enable successful outcomes when they encourage supply chain stakeholders to perform to their best potential. This is because the lack of trust between key stakeholders and a common agenda or understanding is a key barrier to change. National multistakeholder task groups/working committees set in a neutral space are one key to building understanding between stakeholders, sharing evidences and information

and effecting change. Multistakeholder processes benefit from being embedded in a governance and legislative framework. Successful small scale farmer engagement requires credible facilitation that is context responsive and enables flexibility (Proctor, 2007).

Emergence of Supermarkets - The supply chain of fresh and processed food products is changing as supermarkets are expanding and becoming key players in the food retail sector in Namibia. Currently small scale farmers are excluded from the FFV supply chain of supermarkets and wholesalers. Government policies and institutions have only enabled some well-capitalised, large scale FFV farmers who are able to supply high quality FFV throughout the year, to access the supermarkets.

Water Availability - Lack of water for irrigation is a major constraint to the expansion of horticultural production in Namibia. Facilitating farmers' access to supermarkets' supply chain for FFV will require a holistic approach namely irrigation infrastructure development, development of alternative fresh produce markets in the centres of production and consumption as well as regional markets in the SADC. For this to be achieved may require inputs and partnerships of all stakeholders in the FFV sector. Formation of farmer organisations such as co-operatives that provide services (inputs and extension services) and assist producers to market their products may encourage scale-farmers to produce and supply to supermarkets.

Cross Border Trade - As the FFV supply chain develops and matures production of some products could outstrip demand. Therefore, bearing in mind that Namibia is a small market, there is need to facilitate development of regional, cross border and global supply chains which could mitigate the problem of the small market. This calls for working in partnership with Southern African countries and other global players to exploit comparative advantages in each country in order to increase access to exports markets.

Quality Standards - Food quality and standards are important in driving export markets especially for beef



products. Stringent food quality and safety standards may impose constraints on small scale beef producers by increasing transaction costs resulting in these farmers being unable to participate in these global supply chains. All farmers need to be trained and educated through government and private sector initiatives to meet the stringent demands of the world we, from Africa, want to play in. The Department of Agriculture's responsibility is to support sustainable farming practices to meet foreign demand.

Government Intervention - The government should continue to play a proactive role in policy and institutional development to create an enabling environment for supply chains to develop in. The private sector as well as NGOs and other donor organisations should work in partnership with the private sector to facilitate local and global supply chain formation for products such as beef and FFV and dairy products. This can be done through support to co-operatives, setting up new markets and providing technical training for capacity building.

Change happens. The drivers interact unpredictably which puts unprecedented pressures on societies. Agribusiness change processes needs to be set within a wider (development) context. They need to choose a strategy (public policy and/or private sector or joint) which implies certain outcomes and then derive the policy options. In order to assist small scale farmers to respond successfully to change, the change or shock must be assessed. The response to change or shock (i.e. avoid, resist, adapt) by the actors depends on incentives and capacity. Small scale farmers' organisations need to change to cope with market requirements. They need assistance and require development costs to support marketing, technology, finance, managerial and organisational development to sustain the benefits of collective action benefits.

Author

Rosemary Emongor (University of Pretoria)

Editor

Professor C Blignaut (University of Pretoria)

References

EMONGOR, R. A. (2007). The Impact of South African supermarkets on agricultural and industrial development in the Southern African Development Community. Draft PhD Thesis. Department of Agricultural Economics, Extension and Rural Development, University of Pretoria, Republic of South Africa

JAUCH, H. (2004). Trade Unions in Namibia: Defining a new role? Labour Resource and Research Institute, Windhoek, Namibia

LEWIS, J. D. (2001). Reform and Opportunity: The Changing Role and Patterns of Trade in South Africa and SADC. Africa Region Working Paper Series No.14. The World Bank.

PROCTOR, F. (2007). Regoverning Markets Synthesis Workshop Report. Morelia, Mexico. September 2007.

REPUBLIC OF NAMIBIA, (2002). Second National Development Plan (NDP2), 2001/2002 – 2005/2006. Volume one. Macroeconomic, sectoral and cross-sectoral policies. National Planning Commission, Windhoek.

REPUBLIC OF NAMIBIA. National industrial statistics. (2003). Report on the survey of the manufacturing industries. Ministry of Trade and Industry, Windhoek.

REPUBLIC OF NAMIBIA. Ministry of agriculture, water and rural development, (1995) National agricultural policy. Windhoek.

REPUBLIC OF NAMIBIA, (2004). National Horticulture Development Initiative: Feasibility study into the development of Infrastructure for the marketing of horticultural produce in Namibia: consultancy report.

Prepared by International Development Consultancy, Agritel and MBB consulting engineers for the Ministry of Agriculture, Water and Rural Development, Windhoek, Namibia.

REPUBLIC OF NAMIBIA, (2005). Evaluation of the National Horticulture Development Initiative and recommendations for future development. Final Report. Compiled by International Development Consultancy for the Ministry of Agriculture, Water and Rural Development, Windhoek, Namibia.

SCHADE, K., KALILI, N. & SIMPSON, R. (2000). A Survey of Subsistence Farmers in Ohangwena Region. The Namibian Economic Policy research Unit. NEPRU research report No. 19. Windhoek.

UVANGA, T. & DEMPERS, R. (eds), (2006). Making trade work for women: The likely impact of the economic partnership agreements on women's rights and gender. Beef Sector in Namibia. One World action, London and Namibia Development Trust, Windhoek, Namibia.

VAN DER LINDEN, E. (1993). The role of the informal sector. Background paper for the NPC's macroeconomic issues paper. NEPRU Publication No. NWP33. Windhoek, Namibia

WEATHERSPOON, D. D. & REARDON, T. (2003). The Rise of supermarkets in Africa: implications for agri-food systems and the rural Poor. Development Policy Review, 21(3): 333-355.

WORLD BANK (2007). World Development Report 2008. Agriculture for Development. Published by the International Bank for Reconstruction and Development / The World Bank. Washington DC

For further information contact

Prof. André Louw

Department of Agricultural Economics, Extension and Rural Development - University of Pretoria
PRETORIA, 0002, South Africa

Office Room 2.23, Agricultural Annex

Phone +27 12 420 5772

Fax +27 12 420 4958

e-mail andre.louw@up.ac.za

This publication is an output of the 'Regoverning Markets' programme, which is a multi-partner collaborative programme funded by the UK Department for International Development (DFID), the International Development Research Centre (IRDC), ICCO, Cordaid, the Canadian International Development agency (CIDA), and the US Agency for International Development (USAID). The programme analyses the growing concentration in the processing and retail sectors of national and regional agri-food systems and its impacts on rural livelihoods and communities in middle- and low income countries. The views expressed are not necessarily those of the funding agencies.