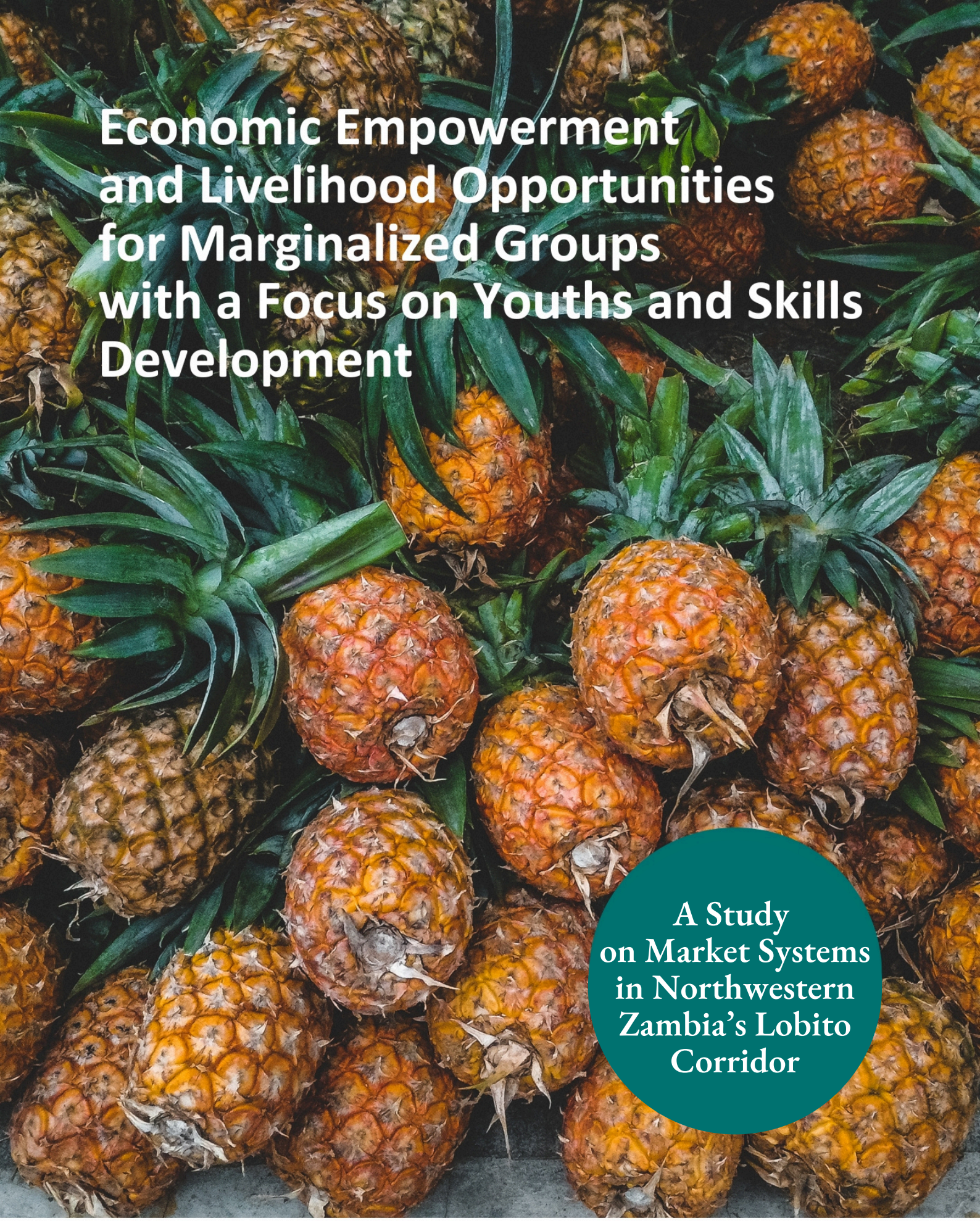

Economic Empowerment and Livelihood Opportunities for Marginalized Groups with a Focus on Youths and Skills Development

A Study on Market Systems in Northwestern Zambia's Lobito Corridor

MUSIKA
Making Agricultural Markets Work for Zambia

www.musika.org.zm

People in Need

Profiles of the Organizations

People in Need (PIN) is a globally recognized non-governmental organization, operating in over 40 countries with a focus on humanism, freedom, equality, and solidarity. With an annual turnover exceeding 200 million EUR, PIN is renowned for its ability to operate in hard-to-reach areas, providing flexible and responsive support. The organization's core pillars include **Emergency Response and Recovery**, **Climate Resilience**, and **Civil Society and Inclusive Governance**. Since 2017, PIN has been actively working in Zambia, focusing on empowering local communities through sustainable agriculture, climate change adaptation, environmental protection, clean energy solutions, and combating malnutrition. Through partnerships with local organizations and authorities, PIN is building resilience, promoting good governance, and driving positive, sustainable change for vulnerable populations across Zambia.

To learn more about our initiatives, visit peopleinneed.net

Musika is a Zambian non-profit organization, supported by the Swedish Embassy, NORAD, and IRISH AID, with a mission to stimulate private investment in the agricultural sector. By focusing on smallholder and emerging farmers, Musika aims to reduce poverty by ensuring agricultural markets are inclusive and work for all, particularly the rural poor in Zambia. The organization's strategy revolves around creating a sustainable market environment that empowers farmers to invest in their production and leverage these markets to move out of poverty. This approach is guided by the **Making Markets Work for the Poor (M4P)** methodology, which drives systemic change in market structures to enhance the economic participation of vulnerable groups.

To learn more about our work, visit musika.org.zm

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Acknowledgements

Musika is an independent Zambian non-profit company that stimulates and supports private sector investment in the smallholder market. Musika uses the Making Markets Work for the Poor (M4P) market development approach to fundamentally change the way agricultural markets work through establishment of mutually beneficial commercial linkages between the corporate clients and the relatively marginalised rural farming communities.

Musika wishes to acknowledge the financial and substantive support of People In Need (PIN) in Lusaka. The market assessment was conducted jointly by Musika and PIN as key implementing partners of resulting interventions. We would also like to acknowledge the technical expertise from Dr. Joshua Munkombwe, Jephthah Chanda, Chisanga Mpundu and Libakeni Nabiwa. We thank the research assistants for helping with the field work.

Any views expressed or remaining errors are solely the responsibility of the authors. Questions and comments should be directed to the Research Manager, 6, Tukuluho Road, Long acres, Lusaka: +260 211 253 989; fax +260 211 255 502; email: timothy@musika.org.zm

Executive Summary

The market assessment of Zambia's Lobito Corridor was conducted jointly by Musika and PIN to identify opportunities for inclusive economic growth within the agricultural sector, with focus on women and youth participation. The study examined honey, pineapple, and cassava as priority value chains, evaluating their viability based on private sector investment interest, market demand, and export potential.

The assessment revealed distinct market dynamics across the three value chains. Honey production, concentrated in Ikelenge, Kabompo, and Mwinilunga, shows significant export potential despite challenges of traditional production methods, equipment shortages, and high regulatory fees. The pineapple sector demonstrates robust growth in Northwestern Province, driven by private sector investment and improved market access, though constrained by limited financial services and post-harvest losses. The cassava value chain remains predominantly subsistence-oriented with underdeveloped market infrastructure, yet offers substantial unexplored industrial applications.

Across all value chains, common constraints include inadequate financial services, poor transportation infrastructure, and insufficient training in quality standards and processing techniques. The study identified key intervention opportunities in three strategic areas: expanding inclusive financial services through innovative blended finance models, improving transport infrastructure to reduce costs and food spoilage, and implementing targeted skills development programs through TEVET institutions.

These interventions align with broader economic development objectives for the Lobito Corridor, with potential to strengthen market linkages, foster sustainable growth, and create inclusive economic opportunities for marginalized groups, particularly women and youth.

See attached diagram for visual representation of key findings across the three value chains.

Economic Opportunities & Challenges in the Lobito Corridor Value Chains

1.0 Introduction

Zambia's development agenda is anchored on fostering sustainable economic growth, reducing poverty, and promoting inclusive development. The Government of the Republic of Zambia (GRZ) has prioritized infrastructure development, agricultural transformation, and industrialization as key drivers of economic progress. Notable efforts include the implementation of the Eighth National Development Plan (8NDP), which emphasizes economic transformation and job creation, human and social development, environmental sustainability, and good governance environments (Government of Zambia).

Inclusive initiatives such as the Farmer Input Support Programme (FISP) and other programmes implemented by its cooperating partners reflect the government's commitment to empowering marginalized groups and boosting productivity. FISP aims to improve the accessibility of agricultural inputs for small-scale farmers at a reduced cost, thereby enhancing their productivity (Ministry of Agriculture).

Complementing GRZ's efforts, cooperating partners like USAID, the European Union, and the African Development Bank are supporting Zambia through targeted interventions in agriculture, infrastructure, and market development. These partnerships focus on building resilient value chains, enhancing financial inclusion, and improving access to markets.

A major highlight of recent development efforts is the growing momentum around economic corridors such as the Lobito Corridor. This strategic trade route, linking Zambia to the Atlantic Ocean, is positioned to unlock export opportunities, strengthen regional trade, and drive economic transformation in key sectors, including agriculture and mining.

This report presents the findings of a collaborative market systems assessment between Musika and People in Need (PIN), titled: "Exploring Economic Empowerment and Livelihood Opportunities for Marginalized Groups with a Focus on Youth and Skills Development: A Study of Market Systems in Northwestern Zambia." The assessment was conducted in the Solwezi, Mwinilunga, and Ikelenge districts of North-Western Province, with a deliberate focus on analyzing economic opportunities and constraints affecting marginalized groups, particularly youth, women, and geographically isolated communities. The study further assessed economic livelihood opportunities existent in other parts of northwestern province (off the corridor).

The study concentrated on key value chains, including honey, cassava, and pineapple, while also exploring other potential value chains. Additionally, the assessment evaluated the potential for export opportunities through the Lobito Corridor. A significant emphasis was placed on identifying ways to foster youth skills development and pinpointing opportunities for targeted interventions that align with the region’s emerging economic trends.

The objective of this collaboration was to gain a comprehensive understanding of the challenges and opportunities faced by market actors, particularly within the selected value chains, and to propose interventions that promote economic empowerment for marginalized groups. The collaboration further sought to unveil how the challenges and opportunities faced by TEVET can be leveraged to improve the status quo. The insights gathered from this assessment aim to inform project ideas and strategies that will contribute to sustainable and inclusive economic growth in Northwestern Zambia.

1.1 Geographical, Economic, and Social Context of the Study Area

The study was conducted in Zambia's North-Western Province, focusing on the districts of Solwezi, Mwinilunga, and Ikelenge. This region, covering approximately 125,826 square kilometers, is rich in natural resources, especially in mining and agriculture (Zambia Statistics Agency, 2020). The area is home to major mining operations, including Kansanshi Mine, Kalumbila Mine, and Lumwana Mine, which contribute significantly to Zambia’s copper exports (International Council on Mining and Metals, 2014). Despite these resources, many rural communities in the province rely on small-scale farming as their primary livelihood, illustrating a distinct

socio-economic dynamic where subsistence agriculture exists alongside large-scale mining activities (World Bank, 2018; African Development Bank, 2021).

North-Western Province is one of Zambia's least populated areas, with 1,270,028 residents and a low density of 10.1 persons per square kilometer, with 58.3% in rural areas and 41.7% in urban areas (ZAMSTAT, 2022). The province saw the highest population growth in the country from 2010 to 2022 at 74.7%, outpacing the national average of 49.8%. Notably, Solwezi Central Constituency experienced the most significant increase, from 132,532 to 332,623 residents, underscoring its demographic prominence. Mwinilunga and Ikelenge constituencies also grew, though at a slower pace, highlighting varied population dynamics across the province's constituencies.

Agriculturally, North-Western Province boasts a variety of activities, with key crops including maize, cassava, pineapple, groundnuts, sweet potatoes, and beans. In the specific districts:

- Solwezi is known for maize, cassava, and groundnuts. The fertile lands support maize as a staple crop, while cassava serves as a food security crop due to its resilience to drought conditions.
- Mwinilunga focuses on cassava and sweet potatoes, with significant cultivation of pineapple, which has potential for both local and export markets.
- Ikelenge predominantly grows cassava, groundnuts, and beans, contributing to household diets and local markets.

While cassava and pineapple are the key crops, they are primarily produced for local consumption due to limited market linkages and infrastructure, with a limited quantity exported to DRC. Honey production is a growing sector but remains underdeveloped due to a lack of equipment, such as beehives, and insufficient training. The study also assessed the potential for increasing agricultural exports through the Lobito Corridor, a new trade route linking Zambia to the Atlantic Ocean, which could open up new markets for agricultural products such as honey and cassava.

Socially, the region is home to diverse ethnic groups, including the Kaonde, Lunda, and Luvale people, who have rich cultural traditions closely tied to land and agriculture. Traditional leaders, such as Chief Mumena of the Kaonde in Solwezi, Senior Chief Kanongesha of the Lunda in Mwinilunga, and Chief Sailunga of the Lunda in Ikelenge, play a pivotal role in local governance, land allocation, and development activities. Chief Mumena, in particular, has been actively involved in promoting development initiatives and has a reputation for supporting progressive agricultural and economic projects in his chiefdom. These leaders are key stakeholders in any development interventions, as their support can significantly influence community participation and the success of market-based projects.

Despite the presence of influential traditional leadership, marginalized groups, including women and youth, face substantial economic challenges. Youth unemployment is high, and access to skills development programs, financial services, and modern farming inputs is limited. Traditional farming methods, like hand hoeing, dominate agricultural practices, further limiting production capacity. Many farmers express interest in scaling up production, particularly if market opportunities through routes like the Lobito Corridor become more accessible.

The Zambian government is represented in the region by key ministries, including the Ministry of Agriculture, which provides extension services and some input support to farmers, and the Ministry of Youth, Sport and Arts, which has initiated youth empowerment programs. However, the scale and reach of these initiatives are often limited by the region's vast size, poor infrastructure, and the challenges of coordinating across multiple districts. The Ministry of Commerce, Trade, and Industry has also sought to promote market access and trade, but more efforts are needed to fully integrate rural producers into broader value chains and national markets.

The Lobito Corridor project

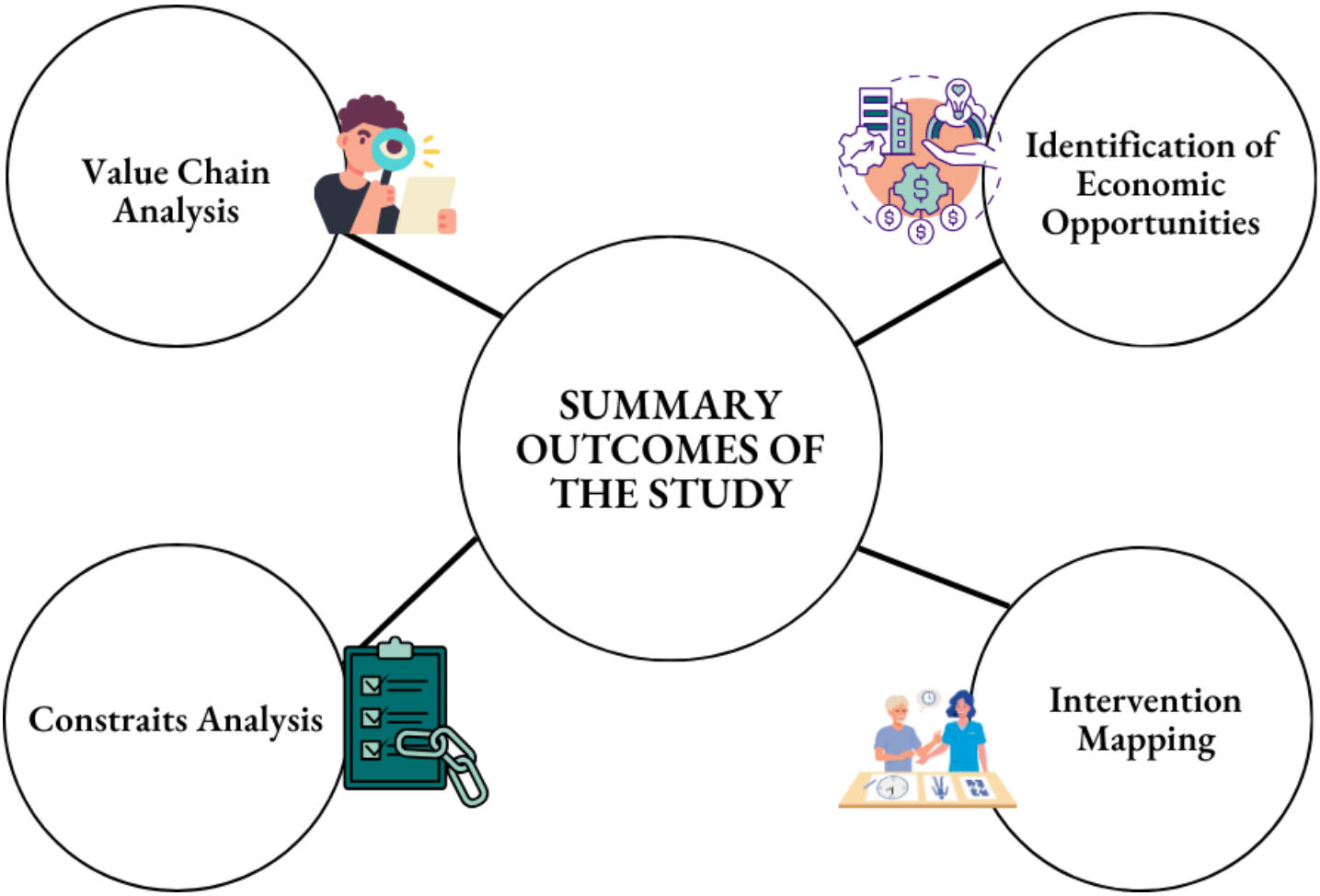
The Lobito Corridor project, established through a Memorandum of Understanding signed at the Global Gateway Forum in Brussels, is a strategic partnership aimed at strengthening trade and connectivity between Zambia, Angola, and the Democratic Republic of Congo (DRC). Supported by multiple stakeholders, including the European Union, United States, African Development Bank, and Africa Finance Corporation, the project involves developing the Zambia-Lobito railway line. This infrastructure connects Northwestern Zambia to Angola's Benguela railway line, providing a direct route to the Atlantic via the Lobito port. As part of the U.S.-led Partnership for Global Infrastructure and Investment, the corridor aims to boost economic development in areas like digital connectivity, agriculture, and green energy while facilitating regional trade across Southern and Central Africa (Ministry of Finance, 2023).

Figure 2.1 The Lobito Corridor (Source -EC-INTPA)

1.2 Objectives of the Analysis

The market systems analysis aims to achieve several specific objectives, each aligned with the overarching goals of People in Need (PIN) and Musika in promoting economic empowerment and enhancing livelihood opportunities for marginalized groups in Northwestern Zambia, particularly those living along the Lobito corridor. The primary objectives include:

a. **Assessment of Economic Opportunities**. To identify and analyze the economic opportunities available for marginalized groups, particularly youth and women, within the local market systems. This includes evaluating the current landscape of employment, income-generating activities, and access to resources.
b. **Value Chain Analysis**. To focus on key agricultural value chains—specifically honey, cassava, and pineapple. This analysis will assess the potential for these products to contribute to local economies and their capacity for export, particularly through the emerging Lobito Corridor trade route. The study aims to highlight how these value chains can be strengthened to enhance income for local farmers and entrepreneurs.
c. **Understanding Constraints**: To pinpoint the constraints that marginalized groups face in accessing economic opportunities. This includes examining barriers such as limited access to financial services, training, markets, and inputs necessary for agricultural production.
d. **Assessing TVET institutions and identifying relative gaps** to understand their capacity, accessibility, and relevance in addressing the skills demand within the region.
e. **Mapping Interventions**: To propose suitable interventions and project ideas that align with the interests of local communities, especially focusing on skills development and economic empowerment for youth. This aspect aims to inform future program design that addresses identified gaps and opportunities.



1.3 Scope and Methodology

The Market Systems Analysis (MSA) conducted along the Lobito Corridor aimed to identify and understand key systemic constraints, opportunities, and interactions among stakeholders across the Zambian part of the corridor. A qualitative research design was employed to explore the corridor's market dynamics in depth, gathering insights from a wide range of participants.

1.3.1 Research Design

The study utilized a qualitative approach, allowing for a nuanced exploration of complex market systems through stakeholder narratives highlighting contextual factors that influence trade and market participation along the corridor.

1.3.2 Data Collection Methods

The study employed the following multiple qualitative data collection methods to capture a broad spectrum of insights:

- *Document and Policy Review*. Relevant documents, policies, trade agreements, and reports were reviewed to contextualize the market systems within existing economic frameworks and understand regulatory influences on the corridor.
- *Key Informant Interviews* (KIIs). Semi-structured interviews were conducted with government representatives, local business owners, SME operators, Tevet Schools, and financial institutions. The interviews provided insight into stakeholders' experiences, market constraints and support services.
- *Focus Group Discussions* (FGDs). FGDs were held with specific community groups, mostly youth farmers and women. These discussions explored social, economic, and cultural factors affecting market access and resilience.
- *Observational Field Visits*. Site visits were conducted along strategic points within the corridor (e.g. border posts, trade hubs). These observations enabled the research team to document logistical conditions, infrastructure quality, and real-time interactions between market actors.

1.3.3 Sampling Strategy

A purposive sampling strategy was employed to ensure representation across various sectors and geographies within the corridor. Key stakeholders were selected based on their roles and relevance within the market system, covering a wide spectrum of perspectives. Sampling continued until data saturation was reached, ensuring comprehensive coverage of market dynamics.

1.3.4 Data Analysis

Thematic Analysis. Qualitative data from KIIs and FGDs were transcribed, coded, and analyzed using thematic analysis. This approach assisted in the identification of recurring themes and patterns related to systemic constraints, enablers, and opportunities within the corridor's market systems.

Market Systems Mapping. The insights generated from the thematic analysis informed the creation of a market systems map, illustrating interactions between core actors, supporting functions, and regulatory frameworks. This map visually highlighted the structural gaps and leverage points within the corridor.

1.3.5 Ethical Considerations

The research team ensured ethical compliance throughout the study by obtaining Informed Consent. All participants were briefed on the study's objectives, with consent obtained prior to interviews and FGDs. Furthermore, to uphold principles of confidentiality, anonymity was maintained for all respondents, and data were aggregated to protect individual identities.

1.3.6 Limitations

Language and Cultural Diversity. Language and cultural variations presented challenges; however, local interpreters and culturally appropriate protocols helped mitigate these issues.

Limited time. Where key and necessary, secondary sources and virtual interviews supplemented primary data collection.

2.0 Market System Overview

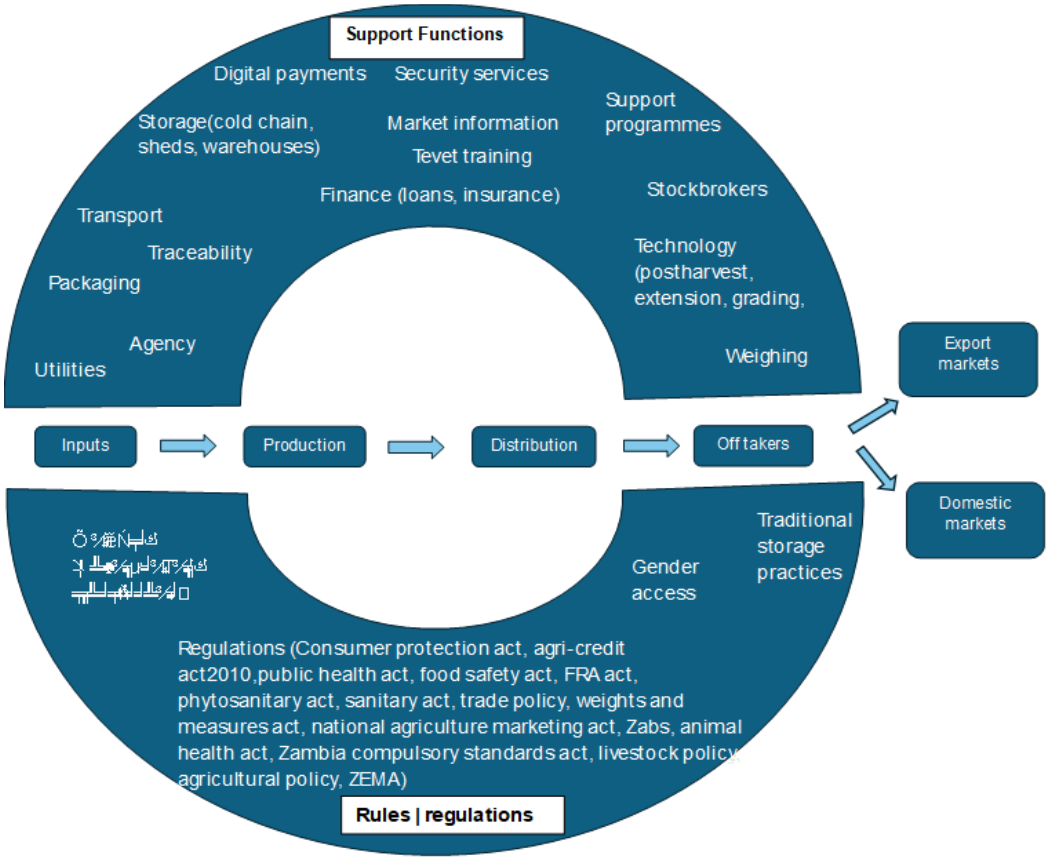


Figure 2.1 Functional market systems map (by author)

This market assessment adopts the 'Market Systems Burger' framework to demonstrate the functioning of key value chains, providing a structured approach to understanding market dynamics. The top layer, representing support functions, encompasses essential services such as TEVET, finance, transport, and packaging services that facilitate market operations. The middle layer identifies key actors in the value chain, including producers, traders, and processors, illustrating their roles and interactions. The bottom layer encompasses the rules and regulations, both formal and informal, that shape the market environment.

2.1 The Honey Burger

The 'Honey Market Systems Burger' serves as a layered framework to visualize the components that shape the honey market ecosystem. Based on the assessment, this model identifies key elements at each level of the market system, from supporting functions to core actors and regulatory frameworks, providing insights into areas where targeted interventions could strengthen and stabilize honey production and distribution within the Lobito Corridor.

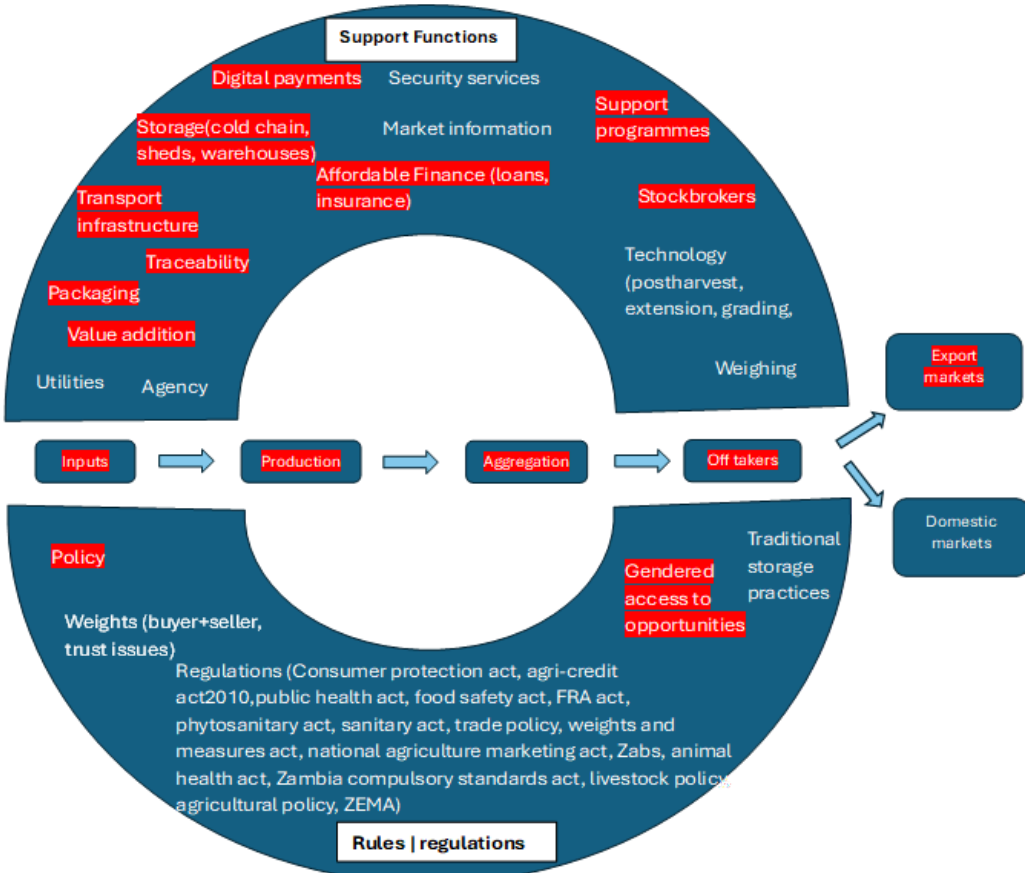


Figure 5.2 The honey market systems burger (by author)

- **Top - Supporting Functions**. The top layer represents essential supporting functions, such as financial services, transport, training programs, and market access services. These are vital resources enabling producers, processors, and traders to efficiently operate within the honey market. Components highlighted in red indicate areas with potential for intervention, such as expanding financial inclusion for beekeepers or improving access to sustainable transportation networks to reduce costs and increase market reach. In addition, incubating modern beehives and beekeeping equipment in cooperation with research institutes or TVET will enhance inclusion and integrate women into the sector by addressing existing gender barriers and social norms connected with traditional beekeeping methods.
- **Middle Layers - Key Actors**. At the core of the burger are the primary actors within the honey value chain: input suppliers, producers, traders, processors, and consumers. These actors form the "meat" of the honey market system, creating vital linkages from production to market access. Red highlights identify intervention opportunities that could support producers and processors with additional training, improved harvesting practices, and enhanced processing techniques to boost product quality and income potential.
- **Bottom - Rules and Regulations**. The foundational layer of rules and regulatory structures sustains the honey market. Formal regulations, such as food safety standards, quality certifications, and export laws, ensure honey's safety and quality. Informal community norms around honey harvesting and environmental practices further support sustainability. Gender norms relating to access to opportunity for youth, women or marginalized groups equally influence the value chain.

Intervention Potential

The red-highlighted areas across the "Honey Market Systems Burger" illustrate points where targeted interventions could positively impact the honey market. Addressing these points can enhance access to resources, improve operational efficiencies, and strengthen the overall sustainability of honey production and market expansion.

2.2 The Pineapple Burger

Much like the honey burger, the pineapple burger highlights the key components of the pineapple market system in Zambia. At the top layer, we find supporting functions, which include services such as TEVET training, finance, transportation, and access to agricultural inputs. Financial services are critical for farmers seeking to invest in better seeds and irrigation systems, while efficient transport is essential for getting fresh pineapples to markets quickly, reducing spoilage.

The middle layer represents the key actors in the pineapple value chain, which include input suppliers, farmers, traders, and processors. Farmers cultivate various pineapple varieties, with Sweet Gold being a popular choice due to its high market demand. Traders play a significant role in connecting producers with markets, while processors add value through canning and juicing, targeting both local and export markets (Zambia Development Agency, 2019; Food and Agriculture Organization, 2020).

In the bottom layer, the rules and regulations encompass both formal and informal systems. Regulatory frameworks such as the Plant Variety Protection Act influence seed quality and access, while informal norms around trade practices shape local market dynamics. Compliance with international food safety standards is also crucial for exporting to markets in Europe and beyond (Ministry of Agriculture, 2021; Zambia Bureau of Standards, 2022).

Components highlighted in red in the burger represent areas with potential intervention, such as improving access to finance for smallholder farmers and enhancing transportation networks to boost market access.

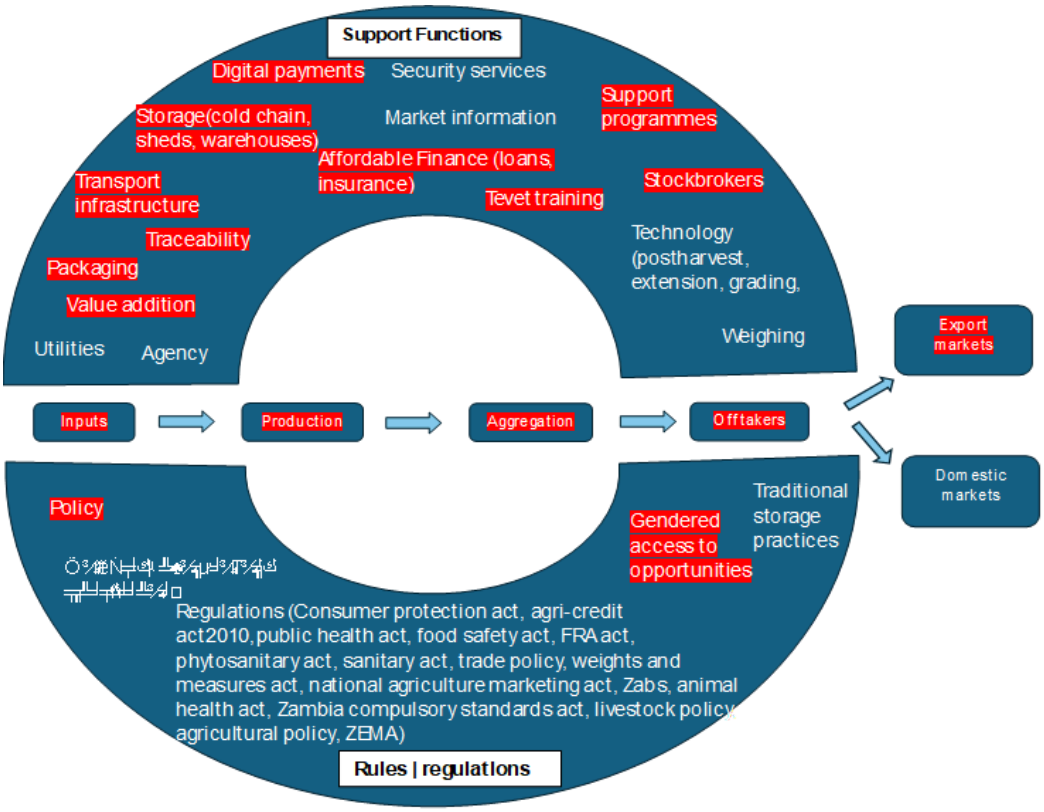


Figure 5.3 The pineapple market systems burger (by author)

2.3 Cassava markets map

The assessment did not gather sufficient information on cassava to create a comprehensive market map. However, it did yield some key insights that can inform future efforts. These include initial data on production, market dynamics, and the main challenges faced by producers, such as limited access to processing facilities and fluctuating market prices. These findings provide a foundation for further exploration and targeted data collection to complete a detailed market map for cassava. The insights are discussed fully in the following section.

In Zambia, dried cassava, often processed into flour , is commonly eaten as a staple food, especially as part of "Nshima", a thick porridge made from maize or cassava meal, or as a side dish with various stews or relishes. - Stock image

3.0 Findings and Analysis

3.1 Honey Value chain

Market Demand and Supply

Demand for Honey along the Lobito corridor is driven by both local consumption and external markets. Local households use honey for consumption and as a substitute for sugar, while some commercial buyers are involved in value-added processing for resale. Local pharmacies and health shops often buy honey for medicinal purposes. Demand in certain areas, particularly near urban centers, tends to be high, with variations in pricing depending on product quality and origin. In some cases, local breweries and confectioners purchase honey in bulk for use as an ingredient in their products.

On the Honey supply, small-scale beekeepers dominate honey production, using a combination of traditional and modern beekeeping practices. These small producers typically supply raw, unprocessed honey directly to consumers, small retailers, or aggregators. Some larger cooperatives or associations might collect honey in bulk to sell to processors or exporters.

Quantities of honey produced per beekeeper vary significantly, with small producers yielding between 5-15 kg per hive annually. Cooperative-managed production may yield higher volumes due to more advanced equipment and practices. Prices range based on honey type (processed or unprocessed) and packaging, with raw honey often sold at local markets for about 60-100 ZMW per kg. Processed honey for higher-end markets can command a premium, reaching 120-150 ZMW per kg, especially if certified organic or marketed as medicinal-grade.

Note worth, though, is the fact that while demand remains fairly consistent year-round, the supply is seasonal, peaking after the main harvest period.

- **Honey Production Areas**. Honey is primarily produced in Ikelenge, Kabompo, Mwinilunga, and Kasempa. While the latter used to be a leading producer, its production has declined due to vegetation disturbances. Mwinilunga currently has significant but reduced local producers due to a lack of suitable tree species for honey production, resulting in partial dependence on imported honey from Angola at a price range of K600 to K650 per 20-liter container.
- **Market Linkages**. The Provincial Forestry Department facilitates market linkages for honey producers, connecting them with established buyers such as Forest Fruits, Wuchi Wami, Nature's Nectar and North Western Bee Products. This support helps ensure a more organized market for honey and increases accessibility for smallholder farmers.
- **Export Opportunities**. National Livestock Epidemiological and Information Centre (NALEIC) is actively facilitating honey trade, primarily targeting international markets. However, there is currently no commercial honey export occurring in the Lobito corridor, and capacity gaps exist in handling and hygienic standards among local producers. Larger processors are forming out grower schemes to ensure quality meets export standards, indicating a potential avenue for growth if local producers can enhance their production techniques and standards.
- **Financial Inclusion opportunities:** Access to finance remains a critical barrier for women and rural farmers in the honey value chain, primarily due to the lack of collateral and high interest rates imposed by traditional

financial institutions. To unlock the full potential of the sector, innovative financial models that blend public, private, and development finance must be explored to improve affordability and accessibility of credit.

- (i) **Blended Finance Models:** A hybrid financing approach, where banks, private investors, and government funds collaborate, can de-risk lending to rural beekeepers and honey processors. Key elements include: Private Sector Co-Investment: Honey processors, exporters, and retailers can establish supplier development funds to pre-finance farmers and buy back honey at fair prices.
- (ii) **Cooperative and Group Lending Models:** Women-led cooperatives and beekeeping associations can access finance collectively, using peer guarantees and pooled resources to secure better loan terms.

- **Climate resilience opportunities:** There are opportunities to improve climate resilience by integrating climate-smart innovations into honey production, ensuring year-round yields while protecting ecosystems and pollinators. Biodiversity conservation, agroforestry, and pollinator-friendly farming can enhance nectar availability and reduce reliance on chemical inputs, safeguarding bee populations. Adaptive hive designs with insulation, ventilation, and shading help colonies withstand extreme temperatures, while artificial nectar supplementation and seasonal hive migration support continuous honey production. Regenerative practices, such as rotational grazing of hives and water conservation measures, further strengthen resilience against climate variability.

Challenges and Constraints

- **Deforestation**. Developmental projects and land-use changes are contributing to deforestation, threatening honey production sustainability.
- **Lack of Equipment**. Smallholder farmers face significant barriers due to the lack of processing and value addition machinery, making it difficult to improve production quality and scale.
- **Traditional Methods**. Many farmers continue to rely on traditional beehives, limiting their production potential and efficiency. The high cost of improved hives remains a major barrier to adoption. Traditional methods often lead to lower honey yields due to inefficient hive structures, destructive harvesting, and poor colony management. Additionally, these practices contribute to deforestation and disrupt bee populations, further reducing productivity. Gender barriers also persist, as hives placed high in trees make access difficult for women and reinforce cultural restrictions. Economically, honey harvested through traditional methods is of lower quality and struggles to compete in high-value markets.
- **Regulatory and Cost Issues**. High statutory fees associated with honey production and export are detrimental, discouraging participation in the sector. The costs of K12/Kg for honey and K18/Kg for beeswax are notable burdens for small producers.

Opportunities and Strengths

- *Technical Training for Women:* Expanding beekeeping training programs has the potential to empower women by equipping them with essential skills in hive management, sustainable harvesting, and production techniques. This can help break gender barriers by making beekeeping more inclusive and accessible. Additionally, training on regulatory compliance and value addition has the potential to enable women and other small-scale beekeepers to produce high-quality honey that meets market and export standards, improving their competitiveness and income.
- *Improved Technologies:* The adoption of modern beekeeping technologies, combined with training, has the potential to enhance efficiency and productivity. Improved hive designs can increase honey yields, reduce colony destruction, and promote sustainable practices, addressing deforestation concerns. Additionally, these technologies can facilitate compliance with regulatory requirements by improving honey quality and

production standards. By enabling higher yields and better-quality honey, beekeepers have the potential to offset high statutory fees and better absorb the costs of honey and beeswax production.

- *Support from Donors:* Financial and material support from donors has the potential to help smallholder farmers overcome cost barriers associated with improved hives, processing equipment, and training. Initiatives like Barrick's provision of 1,000 beehives can increase production while also reducing financial strain on beekeepers. Donor-backed programs also have the potential to assist in meeting regulatory standards by funding training in honey processing, packaging, and certification, ensuring compliance with export regulations. This support can make beekeeping more viable and profitable, helping small-scale producers navigate high statutory fees and operational costs.

Gender and Social Inclusion

- **Equal Opportunity**. The provincial forestry initiatives promote equal opportunities for men, women, and youth in beekeeping, which is critical for enhancing gender equity in agricultural sectors.
- **Women's Participation**. Women are significantly involved in small-scale cross-border trade, particularly in honey and other goods. However, there is a need for further awareness regarding the benefits of beekeeping and access to necessary resources, such as beehives and training.

Environmental and Sustainability Considerations

- **Forest Conservation**. The Provincial Forestry Department measures its impact based on forest conservation and management, which aligns with sustainable practices in beekeeping.
- **Vegetation Disturbances**. The reduction in honey production in some areas is tied to environmental challenges, highlighting the need for sustainable land management practices to ensure the availability of suitable flora for bees.
- **Community Engagement**. Smallholder farmers have shown a willingness to participate in community forest management interventions, indicating a community-driven approach to sustainable forestry practices that can benefit honey production.

Figure 3.1 Honey traders in Mwinilunga

3.2 Cassava Value chain

Cassava Production and Usage

Cassava presents a wide range of industrial opportunities beyond food meal and traditional snacks. It can be processed into ethanol for biofuel production, starch for use in textiles, pharmaceuticals, and adhesives, and animal feed from its by-products. Cassava is also used in the production of biodegradable plastics, glucose, sweeteners, and products for the pharmaceutical and cosmetic industries. Its flour is valuable in baking and gluten-free products, while its starch is also used in adhesives and bio-based chemicals. These applications offer significant potential for value addition, sustainable manufacturing, and economic growth within the cassava value chain (FAO, 2020).

In the sampled areas, cassava is mainly cultivated for household use, with limited surplus sold locally. This pattern is prevalent across all communities within the Lobito Corridor due to its importance as a staple food. Further, cassava is not traditionally grown in certain areas, leading to a lack of interest in its large-scale cultivation. This lack of historical familiarity may explain why some farmers prioritize other crops. Lastly, Production levels are understood to be low due to limited access to high-quality cassava seeds and challenges like cassava brown streak disease, pest infestations (e.g., moles), drought, and limited farming inputs (such as fertilizer).

Market Dynamics

In the assessed areas, cassava is primarily sold to local market traders, with Angolan cassava often filling the supply gap when local stocks run low. However, Angolan cassava is generally regarded as inferior, especially for processing into mealie meal. The limited infrastructure for cassava markets in these areas restricts farmers' interest in cultivating the crop on a larger scale. Farmers emphasize the need for accessible markets and consistent prices to make expanding cassava production economically feasible. Pricing further reflects these limitations, with a 50 kg bag of soaked cassava selling for about K400, and a meda (a local unit) priced between K25 and K40. While this pricing meets local demand, it may not offer the profitability needed to encourage large-scale production without additional market incentives.

Figure 3.2 Cassava small scale trade

Challenges Faced by Farmers

a. *Seed and Input Shortages*. Lack of access to improved cassava seed varieties and other inputs (like fertilizers) is a significant barrier to increasing production.
b. *Labor and Mechanization Issues*. Cassava cultivation is labor-intensive, and without mechanized tools, expanding cultivation is difficult. Farmers currently rely on hand hoeing, which limits their capacity.
c. *High Transport Costs*. Although transport is available, costs can be prohibitive, reducing farmers' ability to market cassava profitably outside their immediate area.
d. *Pest and Theft*. Cassava theft and pest issues (especially with wild rodents) reduce yield, and farmers lack resources to manage these challenges effectively.
e. *Financial Constraints*. Limited access to affordable financing hampers farmers' ability to invest in increased production. Available financing options are often predatory or come with strict repayment terms that deter many from utilizing them.

Willingness to Scale Cassava Production

Despite the identified challenges, there is a clear willingness among farmers to increase cassava production, provided they have access to reliable markets and fair pricing. Farmers are interested in the higher prices cassava could potentially fetch in urban areas, which could serve as an incentive for expansion. Additionally, there is a strong demand for training on best practices in cassava production, as many farmers lack technical knowledge that could help improve yield and product quality.

3.3 Pineapple Value Chain

Figure 3.3 Ikelenge pineapple field

Pineapple production in Northwestern Province, Zambia, particularly in the Ikelenge and Mwinilunga district, has experienced significant growth in recent years due to improved market access and support from organizations such as Musika. The establishment of the Zambezi Pineapples processing factory in 2015 was a crucial development for local smallholder farmers. This factory processes fresh juice and dried fruit, providing a stable market that has greatly reduced post-harvest losses, which had previously reached as high as 80% (Zambian Agribusiness Musika).

Farmers have reported considerable income increases since the factory's operations began. The factory currently supports approximately 600 farmers and has the potential to expand its supply network to include 1,200 smallholders, significantly impacting the local economy.

Export Markets

Pineapples from Mwinilunga are primarily exported to the Democratic Republic of Congo (DRC), where demand is robust. The preference for Zambian pineapples over Angolan produce is due to better road conditions and transport reliability to the DRC, despite the latter being geographically closer. However, the trade through the Jimbe border is minimal, suggesting potential for growth if infrastructure and trade routes are improved.

Market Barriers

Production Limitations. While there is a market for pineapples, local production is constrained by factors such as lack of suitable agricultural practices, access to quality seedlings, and potential land use changes due to deforestation or other developmental pressures like mining.

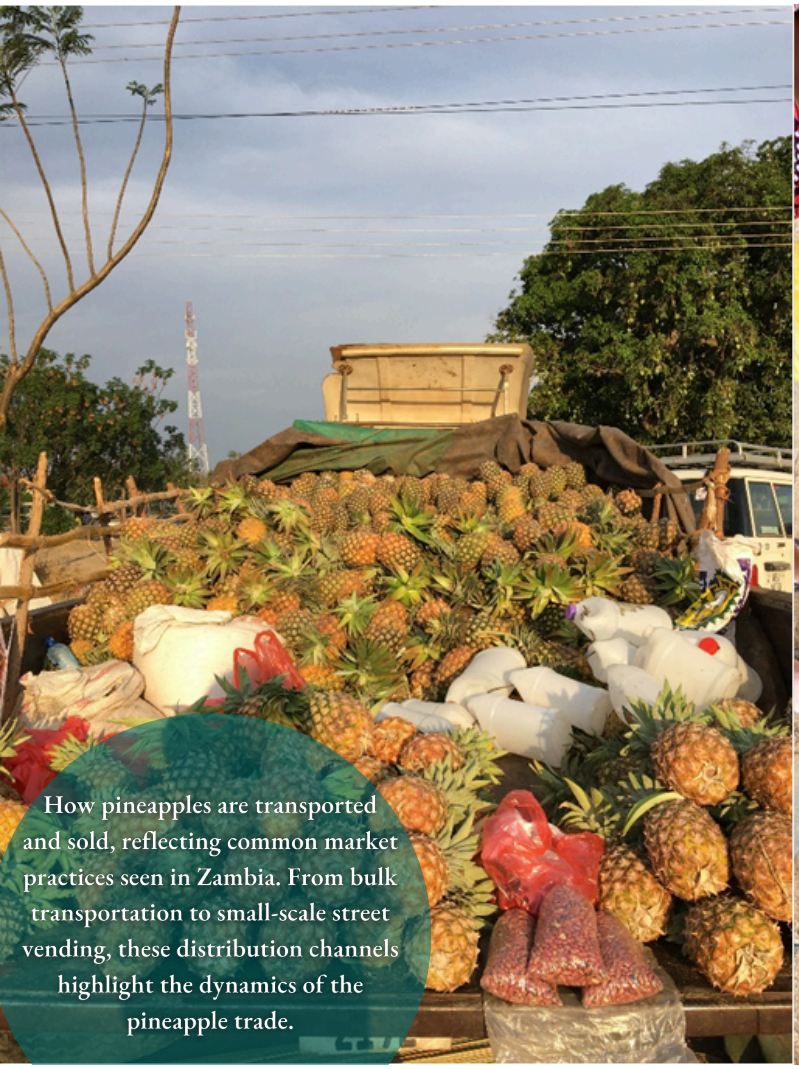
Infrastructure Barriers. The supply chain is hampered by poor infrastructure, particularly in accessing markets efficiently. While Mwinilunga can produce pineapples, transportation issues to DRC and other markets can lead to spoilage and loss of quality.

Opportunities

Infrastructure Improvement. Enhancing road networks and transportation systems could significantly boost trade with Angola and other neighboring countries, improving market access for Zambian pineapples.

Collaborative Initiatives. Continued partnerships between local farmers and larger processors, as seen in honey production, could be replicated in the pineapple sector to ensure quality and access to broader markets. In addition, collaboration between TEVET institutions and private sector actors can bridge existing skills gap and build capacities of women and youth in pineapple production and processing, which meet private sector needs.

Market Expansion. Exploring new export markets beyond the DRC, such as other regional countries, could diversify risks and stabilize income for local producers.



How pineapples are transported and sold, reflecting common market practices seen in Zambia. From bulk transportation to small-scale street vending, these distribution channels highlight the dynamics of the pineapple trade.

Additional Observations and Considerations

Support Programs: There are opportunities for government and NGO support to enhance skills and technologies among farmers, including training programs similar to those offered by TEVETA for other agricultural practices.

Regulatory Environment: Export processes are influenced by regulatory requirements, including inspections and permits issued by authorities such as NALEIC. Compliance with international standards is essential for maintaining access to lucrative markets.

Gender Dynamics: Women's involvement in pineapple production could be encouraged through targeted programs that offer training and financial support, similar to those observed in honey production initiatives.

ADDITIONAL KEY VALUE CHAINS WORTH INVESTIGATING ALONG THE LOBITO CORRIDOR

Tomato, Onion and the sweet bean variety, commonly known as Solwezi beans, primarily cultivated in Solwezi and holds potential as a valuable value chain for further exploration.

4.0 Overview of TEVETA and Trade Schools in North-Western Province

Figure 7.1 Teveta accredited school in Mwinilunga

The assessment deliberately focused on Technical Education, Vocational, and Entrepreneurship Training (TEVET) to identify key constraints and opportunities that can be harnessed to promote economic livelihood opportunities within the Lobito Corridor. The TEVET sector in Zambia, here in the assessment represented by TEVETA and trade schools in North-Western Province, plays a crucial role in building local skills tailored to the region's economic and agricultural needs. The following is an integrated overview of current offerings, support systems, and challenges.

4.1 Program Offerings and Curriculum Development

TEVETA and trade schools in North-Western Province offer a range of programs aligned with regional skills demand, focusing on fields such as general agriculture, carpentry, and beekeeping. These trade schools specifically provide TEVETA-accredited programs (Grade 3, Levels 1-5) in carpentry, with a notable curriculum component on beehive construction to support local honey production and another one on general agriculture that supports crop production (including cassava). In addition to practical trade skills, TEVETA provides an Entrepreneurship module, further enhancing students' business acumen, particularly relevant for agriculture-focused trades.

4.2 Accreditation and Standards

TEVETA's role includes setting standards and developing curricula across sectors, followed by accreditation of training providers and quality assurance of program delivery. For agricultural programs, instructors are required to have academic or practical experience. Additionally, TEVETA has implemented a system to assess and certify individuals with traditional, non-formal skills, giving them the opportunity to receive recognition through trade certificates.

4.3 Course Duration and Certification

The course lengths vary significantly based on skill level, with options including:

- Level 4 Certificate: 2 years
- Level 3 Trade Certificate in specific areas like beekeeping: 10 weeks
- Level 2 Trade Certificate: 6 months
- Level 3 Certificate: 1 year

Some programs, such as the Level 4 Certificate, incorporate industrial attachments requiring 480 learning hours to enhance practical experience.

4.4 Partnerships and Community Support

TEVETA and trade schools in North-Western Province benefit from partnerships and sponsorships, such as Lumwana Mine's support for bricklaying, carpentry, and electrical programs. Constituency Development Fund (CDF) also provides local sponsorship for students pursuing agriculture and tailoring, reflecting community interest in these sectors. TEVETA further collaborates with international organizations, such as the International Labour Organization (ILO) with EU funding, to support student employability.

4.5 Practical Experience and Employment Opportunities

While students in engineering fields often secure internships with large companies like Zesco and Lumwana Mines, carpentry students have limited internship opportunities and generally gain practical experience only in local workshops. Many carpentry students rely on income from agriculture to fund their tool purchases and start small businesses, indicating an area where additional support could enhance outcomes.

4.6 Ongoing Initiatives and Developmental Needs

TEVETA reported that efforts are underway to strengthen training through a dual training model that allows students more time in industry settings for hands-on learning. Additionally, TEVETA is involved in revising the Apprenticeship Act to establish clearer guidelines on financial support during internships. Advisory committees are also being developed to support curriculum alignment with industry needs, with specific focus areas, including agriculture.

4.7 Gaps and Opportunities for Growth

Both TEVETA and trade schools in North-Western Province recognize the need to expand course offerings, particularly in general agriculture and tailoring, which are in high demand in local communities. These sectors are critical to the region's economy, and enhancing training in these areas can provide students with relevant, marketable skills. Additionally, incorporating targeted internships and funding opportunities can ease post-graduation transitions by offering practical experience and financial support, helping students overcome barriers to employment or entrepreneurship. By strengthening these components, TEVET programs can have a more significant impact, preparing students to contribute effectively to their communities and the broader economy.

5.0 Conclusion and Takeaways

The market assessment highlighted that honey, cassava, and pineapple markets in Zambia's Lobito Corridor exhibit unique characteristics, each influenced by specific challenges and opportunities. Honey production primarily involves small-scale beekeepers who face seasonal supply fluctuations and limitations due to traditional practices and a lack of advanced processing equipment. Meanwhile, cassava is mainly produced for household consumption with surplus only sold locally, indicating untapped potential if market access could be improved. Pineapple production, bolstered by processing factories like Zambezi Pineapples, has shown promising growth with reduced post-harvest losses and increased farmer income, suggesting a viable model for agricultural development in the region. Across all three market systems, key issues were identified that hinder market growth and smallholder profitability. For honey producers, deforestation, lack of equipment, and regulatory costs were significant barriers. Cassava farmers struggle with input shortages, high labor demands, transport costs, and pest challenges, all of which contribute to low production levels. Pineapple farmers, though benefiting from processing facilities, still encounter difficulties related to limited access to finance and inconsistent market demand outside of peak harvesting periods. These critical issues underscore the need for interventions to enhance production, quality, and market linkages across each value chain.

Key Market Opportunities

Opportunities exist to drive growth in these sectors through targeted support. For honey, expanding financial inclusion, increasing tailored TEVET education (including manufacturing of modern beehives, modern beekeeping methods, etc.) and providing sustainable transportation infrastructure could lower costs and expand market reach. Cassava's local demand indicates that with better access to quality seeds and affordable inputs, farmers could scale production significantly. In the pineapple sector, expanding export opportunities and forming out grower schemes to meet quality standards presents an avenue for growth and increased farmer income. By addressing these points of potential, the market for honey, cassava, and pineapple can be expanded, boosting income and livelihoods for local producers and contributing to economic stability in the Lobito Corridor.

6.0 Recommendations

This assessment presents the following key recommendations, summarized in the table below. A detailed breakdown follows, distinguishing between short-term and long-term recommendations.

Value Chain	Key Challenges	Recommended Interventions	Expected Outcomes
Honey	Seasonal supply fluctuations; Traditional production methods; Limited access to advanced processing equipment; Deforestation affecting bee populations	Provide TEVET training on modern beekeeping techniques and manufacturing of modern beehives; Facilitate access to advanced processing and storage equipment; Support sustainable forestry management programs; Strengthen financial inclusion for beekeepers	Increased honey production and quality; Reduced post-harvest losses; Higher incomes for small-scale producers; Long-term preservation of bee habitats; Strengthened opportunity-driven TEVET programs including dual systems and market-driven curricula
Cassava	High labor demands and pest infestations; Limited access to inputs and quality seeds; High transport costs; Lack of structured markets	Improve access to high-yield, pest-resistant seed varieties; Establish input distribution networks for rural farmers; Invest in affordable transportation infrastructure; Develop market information systems for pricing and demand	Higher cassava yields and reduced production costs; Lower transport expenses; Increased market participation for smallholders; Improved livelihoods through stable income sources
Pineapple	Limited access to finance; Inconsistent demand outside harvest season; Post-harvest losses due to limited processing capacity	Expand access to micro-finance and loans for small farmers; Strengthen contract farming and out grower schemes; Support the development of additional processing facilities	Stable income for farmers through year-round demand; Reduction in post-harvest losses; Greater alignment with export quality standards; Enhanced profitability and resilience for pineapple producers

Short-Term Interventions

a. **Enhance Financial Inclusion**: Provide accessible loans and financing options for smallholders to improve farm inputs and invest in sustainable practices, particularly for honey and pineapple producers.
b. **Capacity Building and Training**: TEVET strengthening through revision of curricula and building capacity of local trainers via collaboration with private sector actors and establishment of apprenticeship and other work-based learning schemes. Offer immediate training on sustainable honey harvesting, manufacturing of modern beehives, cassava cultivation, and pineapple post-harvest handling to improve yields and reduce losses.
c. **Support Market Linkages**: Partner with organizations to link smallholders to local processors and cooperatives, enabling more structured sales and price stabilization.

Long-Term Strategies

a. **Invest in Infrastructure**: Develop transport networks and processing facilities to support larger volumes of pineapple and cassava for local and export markets.
b. **Environmental Conservation Programs**: Implement reforestation and conservation initiatives to support honey production sustainability, especially in regions impacted by deforestation.
c. **Strengthen Policy Advocacy**: Work with government bodies to reduce regulatory costs for honey and cassava exports, making Zambian products more competitive internationally.

Intervention Partnerships

a. **Collaborate with NGOs and Donors**. Engage NGOs and development agencies to provide technical training, financial support, and conservation resources, ensuring sustainable market growth.
b. **Public-Private Partnerships**. Foster partnerships between government, private companies, TEVETA, TEVET institutions and producer cooperatives to improve design of market-driven TEVET curricula, access to markets, infrastructure, and technical support. Further, these partnerships would provide a conducive operating environment for all stakeholders involved.
c. **Engagement with Local Communities**. Involve community members in conservation and sustainable production practices, encouraging a collaborative approach to market development.

Final Remarks

The study on economic and livelihood opportunities in Northwestern Zambia reveals both challenges and significant prospects for the region. Our findings highlight the potential for local communities to thrive with improved access to markets, better infrastructure, and capacity-building initiatives. These opportunities directly align with the **Zambia Vision 2030**, which envisions a prosperous and inclusive nation where all citizens have access to economic opportunities, and the **8th National Development Plan**, which prioritizes **poverty reduction**, **job creation**, and **inclusive economic growth**.

The data gathered suggests that investments in **agriculture**, **entrepreneurship**, and **skills development** can unlock substantial benefits for households in the region, fostering resilience against economic shocks and improving long-term welfare. These priorities resonate with People in Need's **integrated approach** to development, which emphasizes **empowerment**, **sustainability**, and **local ownership** of solutions and align with Musika efforts in strengthening market opportunities for Zambian farmers.

Moving forward, it is crucial to consider how these economic opportunities can be linked to broader **policy frameworks** and **collaborative efforts** aimed at poverty reduction. By leveraging the insights from this study, organizations and private sector actors can further strengthen their interventions, ensuring that **livelihood programs** are not only **effective** but also **contextually relevant** to the needs of the communities they serve.

Ultimately, this study provides a solid foundation for **future development strategies**, offering a pathway for creating tangible change in the lives of vulnerable populations in Zambia, contributing to **transformative development** that enhances the **dignity** and **well-being** of all individuals.

ANNEX II: STAKEHOLDERS ENGAGED

i. National Livestock Epidemiology and Information Centre (NALEIC)
ii. Nature's Nectar
iii. Forest Fruits
iv. Dytech Limited
v. Eight (8) smallholder farmer groups (Kisalala camp / Mapopo community/ SandaN'gombe / KandaKanda)
vi. Zambia Revenue Authority (Jimbe border post/ Chavuma border post)
vii. Technical Education, Vocational and Entrepreneurship Training Authority (Teveta)
viii. Mwinilunga Traders
ix. Kasempa Ministry of Agriculture
x. Zambezi traders
xi. Mwinilunga Trades training Institute
xii. Carpenters/Sawmills (Timber Suppliers and Cone Makers)
xiii. Local Government Authority
xiv. Forestry department (Mwinilunga, Solwezi)
xv. Department of Veterinary
xvi. Ministry of Agriculture
xvii. Kalene hills
xviii. Solwezi trades training institute
xix. Solwezi pineapple traders
xx. KwashaMukwenu Vocational Training Centre
xxi. NW-chamber of commerce
xxii. Gender Division Department
xxiii. Solwezi Cassava traders
xxiv. Zambezi Traders
xxv. Kabompo Traders
xxvi. Ikelenge honey traders

ANNEX III: KEY OPPORTUNITIES OFF THE LOBITO CORRIDOR

Findings From Chavuma, Zambezi, Mufumbwe, Kabompo & Kasempa

Economic Activities

The districts visited predominantly rely on small-scale farming, livestock rearing, and timber production (exotic timber) as the main economic activities. Other livelihoods include lumbering, mining, honey production, and a growing service industry.

Crop Production

Major crops grown include maize, soybeans, cassava, groundnuts, finger millet, mixed beans, rice, and sweet potatoes, with maize being the most widely cultivated crop across all districts.

Horticulture

The region produces a variety of horticultural products such as roselle (Hibiscus sabdariffa), cabbage, tomato, onion, okra, rape, Chinese cabbage, pumpkin leaves, sweet potato leaves, and cassava leaves. Roselle and sweet potato leaves are especially common in winter and are exported to Solwezi, where they command premium prices.

Tomato Production Challenges

Despite abundant water resources, districts like Zambezi, Kapombo, and Chavuma depend on Kasempa for high-grade tomatoes. Farmers attribute this to limited knowledge of improved production techniques.

Timber Harvesting

Significant timber harvesting activities were observed in Manyinga, Zambezi, Kabompo, and Chavuma districts. Timber is transported to Solwezi, Lusaka, and exported beyond Zambia's borders.

Mining Activities

Unlike Solwezi and Kalumbila districts, where mining is more intensive, areas off the Lobito Corridor have minimal mining benefits. However, illegal mining activities were noted in Kasempa, particularly in the Dengwe area, where people engage in illegal gold mining.

Environmental Concerns

Population growth in Zambezi, Chavuma, and Kabompo districts has led to environmental challenges such as deforestation, poaching, and illegal fishing.

Livestock Production

Livestock kept in the districts include cattle, goats, pigs, sheep, and poultry. Cattle, particularly in Zambezi district, hold the highest socio-economic importance due to the vast grazing plains and abundant water resources.

Fish Supply

Zambezi district is a key supplier of Kakeya, a mixture of small fish species. However, most fish sold in the study sites comes from outside the province, such as Lukulu (Western Province), Kafue, Siavonga, Tanzania, and Malawi. Local fish availability is constrained by low catch rates, loss of valuable fish species, and environmentally harmful fishing practices.

Agricultural Processing

Processing of agricultural produce is limited. Hammer mills for maize and cassava are the primary value addition facilities, with processed meal sold in local markets.

Market Access

Major agricultural markets include border markets for small livestock and groundnuts, local butcheries for beef cattle, the Food Reserve Agency, millers, and middlemen for maize. Cassava is mainly sold in open markets with limited exports to Angola.

Cross-Border Trade

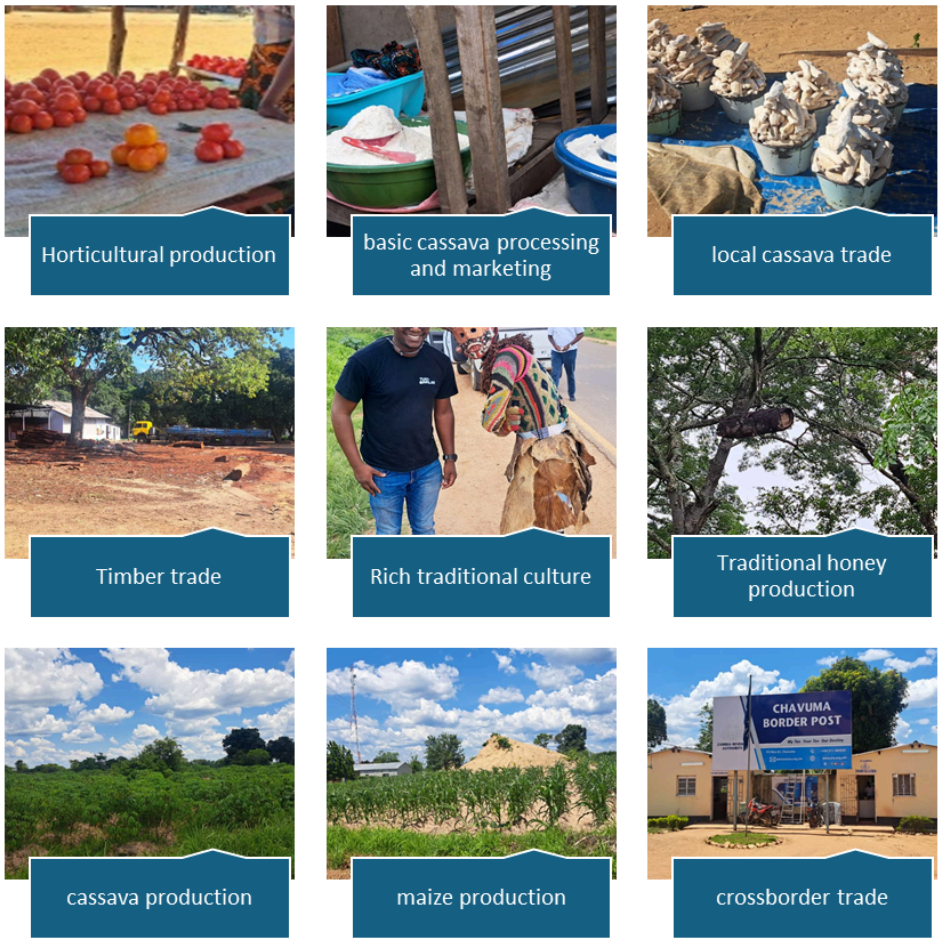
Cassava and groundnuts are the main exports to Angola, although in limited quantities. The Zambia Revenue Authority in Chavuma confirmed more cassava is imported from Angola than exported.

Infrastructure

The districts visited benefit from a high-grade M8 road connecting Solwezi to Chavuma. This road facilitates the transportation of agricultural produce.

Tourism and Hospitality

Zambezi district boasts high-end lodges and guest houses that host visitors during the Likumbi Lya Mize ceremony, a cultural event of the Luvale people. Other districts have limited executive lodges and restaurants serving local cuisine.



Recommendations

On-Farm Interventions

Rainwater Management

Encourage better rainwater harvesting along rivers such as Zambezi and Kabompo to improve food security, create jobs, increase incomes, and build climate-resilient communities.

Rice Production

Promote rice farming in the plains, where its potential remains underutilized compared to Western Province.

Value Addition

Build farmers' capacity to process produce like groundnuts into butter, sunflower into oil, and soybean into animal feed. This will increase incomes and facilitate export opportunities along the Lobito Corridor.

Horticulture

Invest in water harvesting and capacity building to improve horticultural production for markets provided by mines and border areas like Kasumbalesa and Kipushi.

Livestock Production

Leverage the vast plains and water resources in Kabompo, Manyinga, Zambezi, and Chavuma for large-scale livestock production.

Dairy Farming

Establish mini milk processing facilities to tap into the growing dairy market. Currently, farmers sell raw milk in open markets.

Beekeeping
Increase investment in modern apiculture practices in districts like Mufumbwe, Manyinga, Kabompo, and Zambezi. Processing honey locally would enhance incomes from honey and by-products like beeswax.

Aquaculture
Promote aquaculture to supplement livelihoods, as fish stocks in the Zambezi River have severely declined.

Off-Farm Interventions

a. **Timber Processing -** Establish timber processing facilities to add value to logs, increasing incomes for local communities.
b. **Petroleum Importation -** Legalize petroleum importation to curb smuggling and create economic opportunities for locals.
c. **Mining -** Partner with the private sector to regulate and formalize small-scale mining activities, particularly in Kasempa, ensuring local communities benefit from mineral resources.
d. **Cross-Border Trade -** Equip residents in Chavuma and Zambezi with skills and resources to expand cross-border trade with Angola, capitalizing on the demand for Zambian goods.

ANNEX IV: References

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Vote of Thanks

On behalf of People in Need (PIN) and Musika, we extend our sincere appreciation to all stakeholders who contributed to this Market System Study. Our gratitude goes to sector experts, agribusinesses, farmers, and value chain actors who shared their insights, helping to shape a comprehensive understanding of the opportunities and challenges within the market system.

We also recognize the dedication of research teams and technical advisors whose expertise has been instrumental in producing this study. This collaboration reflects our shared commitment to fostering inclusive and sustainable market development in Zambia.

As we continue to work towards strengthening market linkages and economic opportunities, we invite stakeholders to engage with us and leverage these findings to drive impactful change.

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