Reconfiguration Reindustrialisation as a Panacea of Bulawayo's Manufacturing Sector for Sustainable Economic Growth

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ABSTRACT

Industrialisation plays a key role in the social and economic development of countries worldwide, especially developing countries such as Zimbabwe. However, due to stiff competition from advanced economies with better organised policies and state of the art technologies, developing countries have seen a slow-down of industrialisation. Zimbabwe's economic slow-down in the last 30 years has been characterised by a general decline of industrial economic activities. Massive de-industrialisation and relocation of companies to Harare have affected industrial performance in Bulawayo, the second largest city, once the industrial hub of the country. This economic slowdown, high unemployment and poverty levels put re-industrialisation of Bulawayo on the spotlight. Data for this research was collected through a validated questionnaire administered to respondents of 145 companies in Belmont, Donnington and Kelvin industrial areas. Concerns and viewpoints on strategies for reindustrialization and revival of the Bulawayo Metropolitan Province industrialisation were shared by respondents. Results and discussion show that lack of concessionary funding, development of provincial value chains, redressing infrastructural renewal, revival and recapitalisation of the National Railways of Zimbabwe, resuscitating capital equipment rebates, operationalising the devolution and decentralisation policies as well creating viable industrial parks and special economic zones, clearing of external debts and formalising the economy emerge are key tenets of reindustrialisation strategies. The realignment of the reindustrialisation strategies with government national industrialisation development policies is necessary for the realisation of benefits of the 4th Industrial Revolution and also to remain regionally and internationally competitive. Zimbabwe's vision of an upper-middle society by 2030 should be anchored on retooling and reindustrialisation as a panacea for industrial development, employment creation and economic growth.

Keywords: Bulawayo, Economic growth, Industrialisation sector, Reindustrialisation, Reconfiguration, Panacea, Zimbabwe.

EL Classification: H32; F43; M21

INTRODUCTION

Zimbabwe at independence in 1980 inherited a relatively developed and diversified manufacturing sector by Sub-Saharan African standards, producing many different products (ZEPARU, 2014). The major manufacturers of consumable goods were located in Harare and Bulawayo, each accounting for close to 50% and 25% of manufactured output, respectively (Kanondo *et al,* 2011). The manufacturing sector consisted of some 1 260 firms, producing 7 000 different products. The industry was configured for backward and forward linkages, with mining and agriculture topping the charts as critical sectors (Ndlela & Robinson1995). The spill-over effect of the manufacturing sector positioned industry as an important driver of economic growth. The financial crisis of 2008 left many economies regearing and encouraging industrial growth as most governments in developing countries started reconsidering and reviewing industrial policies and mooting retooling and reindustrialization (Penava *et al.*, 2016). Rowthorn & Coutts (2013) defines reindustrialisation as increasing the share of industrialisation industry in value-added production or employment.

Bulawayo Province has been a hub of industrial activity during the pre and post-independence eras boasting of massive production of clothing and textiles, construction materials, household goods, leather products, agricultural equipment, food and beverages as well as travel and leisure products (Provincial Industrial Development Strategy, 2020). At its peak in the 1970s, the City of Bulawayo, Zimbabwe's second city was called the Manchester of Rhodesia or the Gauteng of Rhodesia, home to vibrant food and beverages, engineering and industrialisation, textile and consumer goods as well as automotive sectors (Africa Report, 2023). Some notable industries in these various sectors and their manufacturing focus are as listed in Table 1. The NRZ established in 1893 and headquartered in Bulawayo to serve mines and farms, provide a transport link to sea ports and contribute to economic development, is the oldest company listed on Table 1.

Table 1: List of historical and current Manufacturing Firms in Bulawayo

#	Sector(s)	Major or Key Firms in the industry	Year Est.	Industry focus on establishment
1	Food & Beverages	Cold Storage Commission	1938	Specifically created to promote and develop the beef industry in the country
		National Foods	1920	Milling, primarily flour and maize
		Chibuku Breweries	1961	Commercial sorghum beer brewing based on the traditional Umqombothi homemade African beers
		Delta Beverages	1898	To brew lager beer To grow the brewing sector in the country
		United Refineries	1935	To produce affordable and quality cooking oil as well as personal care and grocery products for customers.
		Schweppes	1930	To produce local fruit juice, using oranges from the Mazowe Valley
2	Engineering & Industrialisation	Cold Storage Commission	1938	To promote and develop the beef industry in the country
		Electricity Supply Commission	1936	To provide a unified electricity supply service, working alongside the municipal power stations that already existed in major cities like Bulawayo and Salisbury
		Nimr and Chapman	1931	Industrialisation spares for the mining industry
		Early Foundry and Engineering Firms	1894-1896	To serve agriculture and mining sectors • Mining and agriculture • Support other industries • Incipient industrialisation
		Eagletron International (Pump & Steel Supplies)	2003	To provide "steel solutions" by supplying steel and steel products for industrial, building and mining customers.
		National Railways of Zimbabwe	1893	To connect the landlocked country to sea ports in Mozambique and South Africa and facilitate international trade through:- • Serving mines and farms • Linking to sea ports • Economic development
		ZECO Engineering	1948	Steel construction, manufacture and rehabilitation of railway wagons and coaches
3	Textiles and Consumer goods	Merlin	1954	Manufacture textiles, including towels and nappies
		National Blankets	1939	Manufacture blankets for local and export use
		Government Printers	1947	To print parliamentary statutes & other government publications • Printing of parliamentary statutes & publications • Printing & publishing arm of the government

4	Automotive	More Wear industries (vehicle assembly)	1947	Steel fabrication & production of an assortment of steel products • Support industrialisation in the country through a vibrant steel sector value addition
		Dunlop (Tyre production)	1957	To produce tyres for both the local and regional markets • To meet the demand for locally manufactured tyres in Southern Rhodesia (now Zimbabwe) and the surrounding regional countries

Source: Compiled by authors from various sources

Bulawayo was part of Matebeleland North Province then and her industries contributed significantly to country's gross domestic product (GDP), employment and foreign currency generation through value-added export commodities. The contribution to GDP by industries in Bulawayo in 2021 was estimated at 13.6%, second to Harare. The export destinations for commodities from these industries included the Southern Africa Development Community (SADC) region, particularly South Africa and also the United States of America, Germany, China and the United Kingdom among others.

At the peak of industrialisation in the 1970s, Bulawayo was nicknamed "*Kontuthu Ziyathunqa*" or the "*City of smoky fires*" in recognition of industrial activity producing smoke everywhere across the bustling city. The tide turned in the 1990s and 2000s which were decades of deindustrialisation of the economy of Matebeleland and City of Bulawayo as the deceleration effects of industrialisation that escalated during the economic structural adjustment programme from 1991-1995. Mbira (2015) mentioned that the decade long economic crisis in Zimbabwe, stretching from 2000 to 2009, saw the lowest shrink of the economy during which industries closed, services sector firms shut down or downsized amid a variety of economic viability challenges, as the agricultural sector also operated below sustainable capacity levels. Research by the Ministry of industry and commerce in 2022 showed that, in 2009 alone, 87 Bulawayo companies shut down (Ministry of Industry and Commerce, 2022). The challenges were characterised by high costs of production, foreign currency shortages, high utility costs, limited funding for retooling, abrupt industry shutdowns and dwindling foreign direct investments among others. The pressure from harsh economic working conditions, a lack of working capital and competition from cheap imports fuelled the collapsed of industries in the City of Bulawayo (ZNCC, 2021).

Irrespective of economic challenges faced by the country, Bulawayo can regain its once revered industrial status, rebuild its huge exports potential of steel wire, maize and flour, safari shoes, belts, sandals, footwear, conveyor rolls, high-density polyethylene (HDPE) pipes, bulk bags, door frames and processed foods like biscuits, cooking oil, sweets and canned meat. The government of Zimbabwe developed a number of "eases of doing business" policies which firms across the country could exploit for both growth and survival. Attempts by government at assisting companies retool have successfully led to the revival of some companies experiencing double or treble production levels (National Budget, 2022). Government has since 2017 openly declared the desire for Bulawayo regain its industrial hub status and many companies were assisted to retool and build solid domestic industrial bases which are critical building blocks towards the attainment an upper middle income society by 2030 (MoFEDIP , 2023). However, such good intentions by government and their outcomes are a drop in the ocean considering the number of firms that have shut down and others in distress.

Statement of the problem

Since 1997 the Zimbabwean economy has been on a free-fall with real Gross Domestic Product (GDP) plummeting by over 40% from 1997 to 2006 (Techfin Research, 2007), while inflation soared from around 20% in December 1997 to a record peak of 7 635% in July 2007 (Central Statistical Office, 2007). The economy completely collapsed and it was perpetuated by the severe decline of the manufacturing sector as well as the total collapse of the vibrant agriculture sector (Confederation of Zimbabwe industries, 2006 cited from Nyathi, 2021). Dollarisation of the economy in 2009 ushered a new era when the government implemented a recovery policies that stabilised manufacturing decline. However it has been posting suboptimal performance. This paper seeks to address the massive decline of Bulawayo's manufacturing sector caused by stiff competition from advanced economies, leading to massive de-industrialization, high unemployment and escalating poverty levels in a city that was once the industrial hub of the country.

Research Objectives

The paper sought to:

i. identify strategies for re-industrialization of the industrialisation sector,
ii. assess the role of industrialisation in economic development,
iii. determine the needs for manufacturing sector revival and
iv. Assess the alignment of government policies with the 4th industrial revolution strategies for competitiveness purposes.

THEORETICAL AND EMPIRICAL LITERATURE REVIEWED

The theory of coordination failure says markets may fail to coordinate complementary activities and when complementarities exist, returns of one investment depend on the presence or extent of other investments as two existing scenarios (Hoff and Stiglitz, 2000). Optimally, all investors are better off with investments achieved simultaneously and it is ridiculous for investors to imitate expectations as actions of business competitors leading to failure in coordinating investors' actions. Ultimately, coordination failure drives the market towards an inferior equilibrium instead of towards a potential situation where resources would be optimally allocated resulting in all agents better off. This theory posits that when decision making exhibits traits of coordination failure an underdevelopment equilibrium is always possible.

Early coordination failure economists emphasized the role of the government in solving the problem. In order to reach an optimal level of coordination, a public-led "big push" investment programme with complementarities in the rest of the economy is recommended. The United Nations Development Programme recommended the "big push" strategy as necessary for developing countries to overcome the poverty trap, through pushing basic investments in areas of public administration, human capital and key infrastructure development (United Nations Development Programme, 2005).

Research usually puts government at the centre of a successful avoidance of coordination failure. Only government is capable of creating effective and attractive strategies that incentivise industrial growth through calculated financial and other fiscal injections and deliberate industrial development policies. Pursuit of bad and retrogressive polices deters investment and industrial growth and unprecedented collapse of many industries. Consequently, bad policy implementation pushes economies into worse disequilibrium out of which will always be very difficult to emerge unscathed. Post-independence the government of Zimbabwe has been making bad policy pronunciation leading to a coordinated failure of the manufacturing sector.

The Role of the Manufacturing sector in Economic Development

Industrialisation plays a key role in developing countries economic development. The importance of industrialisation has however diminished over the last 20–25 years, causing premature de-industrialization or non-industrialization in developing countries (Haruchi, Cheng & Smeets, 2017). The colossal decay of the economies is usually accompanied by low capacity utilisation and can only slump amid industry and firm closures. The slowdown of economic growth in Bulawayo, characterised by high unemployment and poverty levels brought the issue of re-industrialisation back into the spotlight. Government through its National Development Strategy 1 and Zimbabwe National Industrial Policy promised to reindustrialise Bulawayo. Literature supports revival of manufacturing sectors it is the backbone of strong economies as Moyo & Jeke (2019) posit that the manufacturing sector poses a potential solution to reinvigorate the economy and livelihoods in Zimbabwe.

Studies on Reindustrialisation : The Role of Manufacturing

Attiah (2019) examined the role of industrialisation and service sectors in economic development in the period 1950-2015 in 50 countries comprising 10 advanced & 40 developing economies. The research results were in line with the industrialisation engine of growth hypothesis with the share of industrialisation of GDP positively related to economic growth and the effect more pronounced for the poorer countries although no such effects were found for services. The analysis of the role of industrialisation and service sectors in periods of growth acceleration showed that the effects of industrialisation are particularly pronounced in periods of growth acceleration. The conclusion was that industrialisation is especially important in periods of accelerated growth while services play a lesser important role in growth accelerations than industrialisation.

Gumbe & Chaneta (2014) argued that the manufacturing sector in Zimbabwe plays a critical role in the economic development through contributions to employment creation, GDP, savings and foreign exchange generation. The Government of Zimbabwe (GoZ) crafted a number of programmes aimed at economic rejuvenation since emergence of the industrial decline in the late 1980s. The policies and programmes include the economic Structural Adjustment Programme (ESAP, 1991-1995), the Zimbabwe Programme for Economic and Social Transformation (ZIMPREST, 1998-2000), the Millennium Economic Recovery Programme (MERP), the Zimbabwe Agenda for Sustainable Socio-Economic Transformation (ZIMASSET, 2013-2018), the Zimbabwe Industrial Development Policy (2012-2016), the Zimbabwe Industrial Reconstruction and Growth Plan (ZIRGP, 2024-2025) and the National Development Strategy 1 (NDS1). Despite these programmes dating back almost 40 years, their impact on industrialisation has been rather elusive or minimal.

Haraguchi *et al.*, (2016) showed that although industrialisation plays a key role in the economic development, the importance of industrialisation has diminished resulting in premature deindustrialization or non-industrialization in developing countries. This research explores whether the low levels of industrialization in developing countries are attributable to long-term changes in opportunities available to the sector around the globe. Ogbodo (2018) examined the impact of manufacturing sector development on economic growth in Nigeria for the period 1981 to 2017 using ordinary least square (OLS) estimation technique. The research sought to determine the impact of manufacturing sector development on economic growth and also to ascertain the direction of causality between the manufacturing sector and economic growth in Nigeria. The error correction model (ECM) results showed that manufacturing sector output had no significant impact on economic growth in Nigeria, t-statistic and probability values were 1.19 and 0.24, respectively. The result further revealed that interest rate and gross fixed capital formation exhibited a statistically insignificant impact on economic growth over the period. The research recommended government implementation of appropriate reform policies that would ensure efficiency in Nigeria's industrialisation sector.

Moyo & Jeke (2019) postulate that the manufacturing sector plays an important role in the economy although Africa has experienced significant deindustrialisation over the last few decades, economic growth has been on an upward trend over this period. The high growth rates have mostly been propelled by improved macroeconomic stability and the commodity price boom. The slowdown in commodity prices has recently caused a deceleration of economic growth begging the question whether promoting the manufacturing sector generally results in higher and sustainable economic growth and reduction of unemployment? This research assessed the impact of the manufacturing sector on economic growth in 37 African countries employing the System-GMM Model for the period 1990 and 2017. The results showed that industrialisation value had a positive effect on economic growth in African countries and recommended the enactment of measures targeting boosting industrialisation output.

Sallam (2021) examined the role of the manufacturing sector in stimulating economic growth in the Saudi economy employing annual time-series data spanning 1980–2018. The databases of the Saudi Arabian Monetary Authority using the cointegration and Vector Error Correction Model (VECM) approaches to examine the short and long-run relationship causality between variables were used. The VECM is a statistical model used in econometrics to analyse relationships between non-stationary but cointegrated time series variables. The results showed a two-way causal relationship existing between the manufacturing sector and economic growth. Furthermore, the results indicated a unidirectional causal relationship between the industrialisation and the services sectors.

Szirmai (2011) found that the importance of the manufacturing sector lies in accelerating growth and achieving catch-up in developing countries predominated by market service sectors which are a potential source of growth. Su and Yao (2016) exploited a large dataset covering internationally comparable sectoral information for middle-income economies and they proved that the manufacturing sector was imbued with three important characteristics. First, for middle-income economies, industrialisation pulls along services, such that a decline in the manufacturing sector growth rate will negatively affect the services sector growth rate, in both the short-run and long-run meanings. Second, industrialisation development not only promotes the incentives of savings, but also accelerate the pace of technological accumulation. Third, an increased share of the manufacturing sector in middle-income economies can enhance the utilization of human capital and economic institutions. They concluded that the manufacturing sectors are still the key engine of economic growth for middle-income economies.

METHODOLOGY

This research adopts Nyathi *et al.,* (2024) who applied a qualitative research approach aligned with the interpretivism philosophy. Saunders *et al.,* (2016) affirmed that such typical methods are for information gathering technique that led to generation of non-numeric data. The number of manufacturing sector factories in Bulawayo registered in terms of the Factories and Work Act [Chapter 14:08] with at least 10 employees were the targeted population and these numbered 184 across various sectors. The focus was on the analysis of interactions and contributions of the broad economic sector output growth and employment creation in Bulawayo. With 184 as the targeted population and assuming a small margin of error of 5%, a sample size that is representative at the 95% confidence interval would be 121. Thus, the research sampled 121 manufacturing sector firms for this particular exercise. The research adopted the census sampling method rather than considering the whole entire population under the research (Moholwa, 2017). Sixty-eight companies across all these sectors were sampled as shown in the Table 2. Chinjova (2019) conducted qualitative research that generated volumes of data on concerns and viewpoints on the elusive quest for reindustrialisation of Bulawayo's manufacturing sector towards sustainable economic growth. In this research, questionnaires were also used to collect primary data in a standardised way since much of the information sought needed considered response and references to records. Interviews were conducted on 120 company representatives using a questionnaire to collect comprehensive data that enabled an in-depth analysis of a problem.

Table 2: Number of Companies in Key Economic Sectors

Sector	**Population**	**Sample size**	**Sample/ population (%)**
Beef to Leather sector	20	10	50
Iron, Engineering & Steel	40	32	80
Pharmaceutical	6	3	50
Food & Beverages	25	16	64
Plastic, Packaging & Rubber	18	11	61
Chemicals & chemical products	24	14	58
Textile & Clothing	18	13	72
Wood technology	15	9	60
Paper, printing & publishing	8	7	88
Car assembly & repairs	10	6	60
Total	**184**	**121**	

Source: Ministry of Industry and Commerce, 2025

Business owners, managers and industry representatives from organisations and companies such as Confederation of Zimbabwe Retailers, Probaz, Confederation of Zimbabwe Industries, Zimbabwe National Chamber of Commerce, Zimbabwe Investment Development Agency, Zimtrade and Ministry of industry and Commerce among others were targeted. A convenience sampling technique was utilized to select the business owners or managers of companies in all sectors in Bulawayo Metropolitan Province. Primary data was collected using 140 validated questionnaires since much of the information sought needed a considered response and reference to records and collected in a standardized way. The thematic approach was applied to establish themes, analyse and interpret the data to track each set objective of the research.

FINDINGS AND DISCUSSION

Findings show that manufacturing sector still is the largest driver of economic growth in the country. The Zimbabwe National Statistics Agency (ZIMSTATS) economic census 2025 revealed that Bulawayo Province has the most compliant manufacturers at 29%, which makes revival of Bulawayo industrial hub necessary. These findings also show that the industrialisation sector's value added and employment contribution to GDP and employment, respectively, have not changed significantly since 1970. Bulawayo now has only one manufacturer of formal trousers and one suit manufacturer while there are two modestly sized companies which are industrialisation ladies' wear. Zimbabweans now rely on imports for the majority of their clothing from shorts, shoes and denim wear.

Respondents' Characteristics

Respondents comprised senior managers, mostly managing directors and finance managers in charge of various aspect of the sampled manufacturing sector firms. Figure 1 shows that twenty-one percent (21%) of the respondents had been senior managers for a period of five (5) or less years whereas forty-one (41%) indicated that they had been present in senior administration position for between five (5) and 10 years. Thirty-eight percent of the respondents had been senior managers for more than 10 years. This implies that the bulk of respondents were knowledgeable and seasoned senior administrators whose responses can be considered reliable and authoritative.

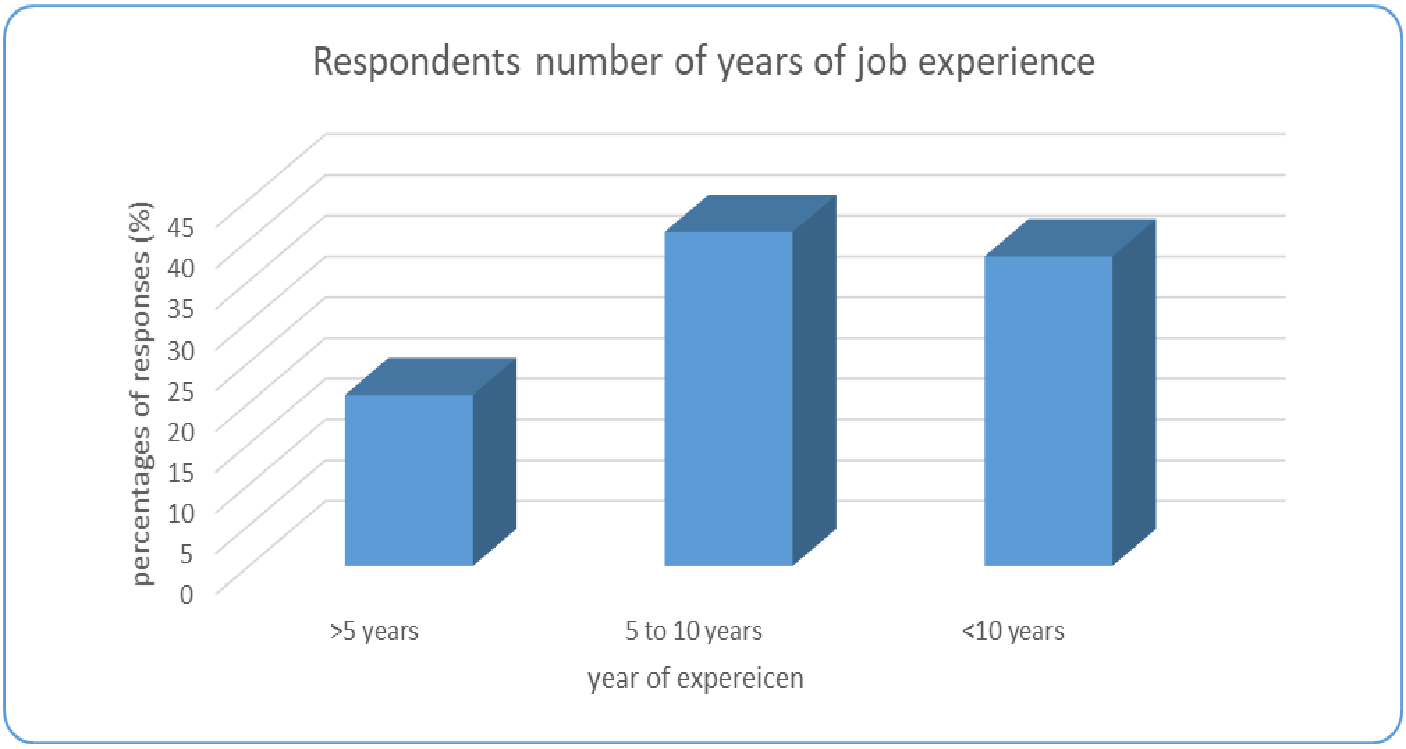

Figure 1: Number of years of job experience

Strategies to revive the industry of Bulawayo

The revitalization of Bulawayo Province's manufacturing sector remains a persistent challenge. For years, industrialists have cited a core group of unresolved issues to regulatory bodies and government institutions as essential for stimulating growth. Figure 2 below reveals these expert-identified prerequisites, which are considered fundamental for the sector's recovery.

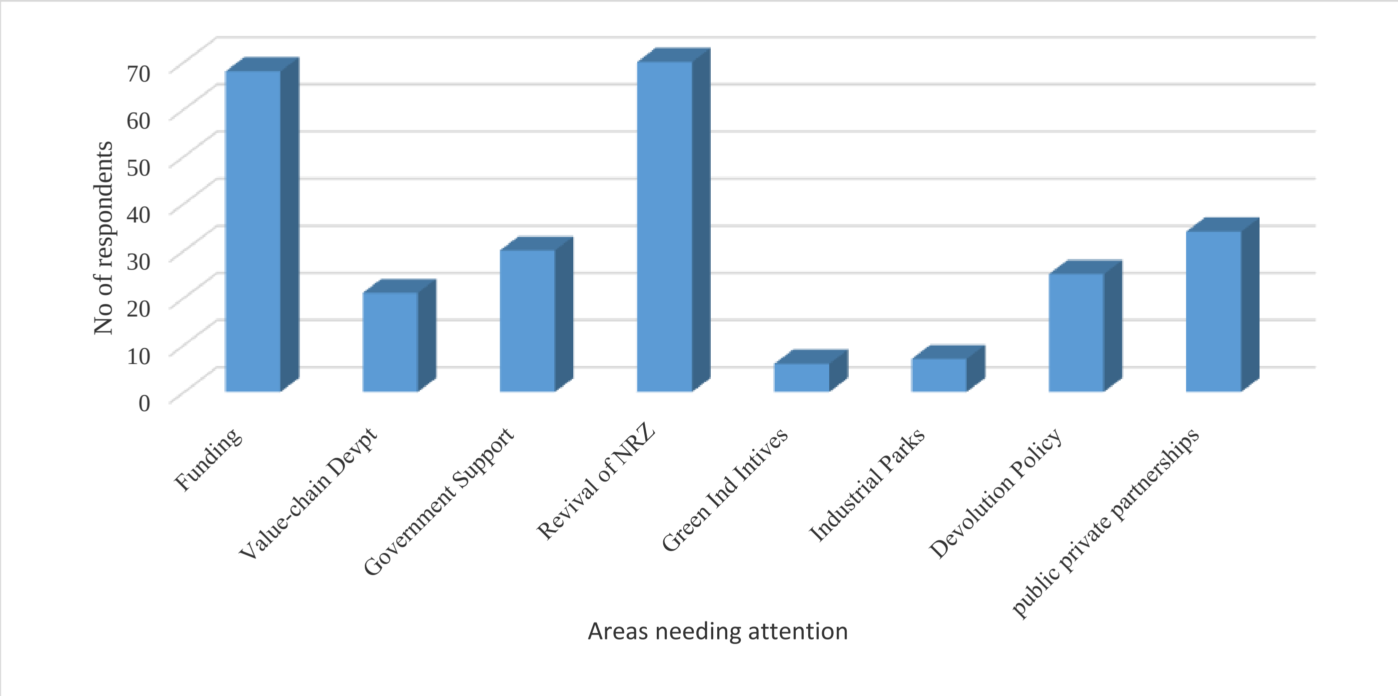

Figure 2: Strategies to Reindustrialise the Industrial Sector in Bulawayo

Concessionary Funding

Concessionary funding is favourable financial assistance that governments, international organizations, or development banks provide to support developing countries, typically with low or no interest, extended grace periods and flexible repayment terms. Respondents reiterated that government and the financial sector should provide concessionary funding to deserving industries in Bulawayo. Moreso, such funding if allocated from the fiscus and external credit lines like the International Monetary Fund Special Drawing Rights should be made available at low interest rates and long repayment tenures to allow industries to generate production without daunting repayment burdens. The government put aside USD22.5 million from the Special Drawing Rights to support distressed companies in the industrialisation sector. The SDRs are an international reserve asset created by the IMF to supplement member countries' official reserves. Sixty-eight percent of the respondents amongst senior managers expressed concern that there seemed to be no serious commitment to revival without concessionary government financial support at affordable interest rates that would enhance competitiveness on the provincial, domestic and the international market. Chinjova (2019) also reveals that revival of Bulawayo industries is anchored on availability of funding.

Development of the Pharmaceutical Provincial Value Chains

Zimbabwe is aiming for sustained growth to achieve Vision 2030 through resuscitating and strengthening existing value chains as well as developing new value chains targeting mineral beneficiation (National Development Strategy 1, 2020). The Bulawayo metropolitan province’s economy is driven by pharmaceutical, beef to leather, textile to clothing, mineral based value chains and automotives among others. The pharmaceutical firms still operating in Bulawayo today include Zimbabwe Pharmaceuticals (Pvt) Ltd, Datlabs (Pvt) Ltd, Winters Pharmaceuticals, Pharmaceutical Distributors, Greenwood Wholesalers & Pharmaceuticals, Hawthorne Medical Supplies and Choice Pharmacy, MediHealth Pharmacy, Varichem Pharmaceuticals and CAPS Pharmaceuticals among many others. The pharmaceutical manufacturing sector in Bulawayo was built on a strong industrial foundation inherited at independence and should therefore be prioritised for resuscitating and strengthening existing industries in the province apart from developing new ones. Sixty seven percent of respondents revealed that a complete re-evaluation of the value chains should appropriately reposition Bulawayo industries to increase production and productivity across all sectors, employing import substitution strategies to domesticate key value chains thereby ultimately propelling export led growth in the medium to long term.

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Developing the Pharmaceutical Value Chain

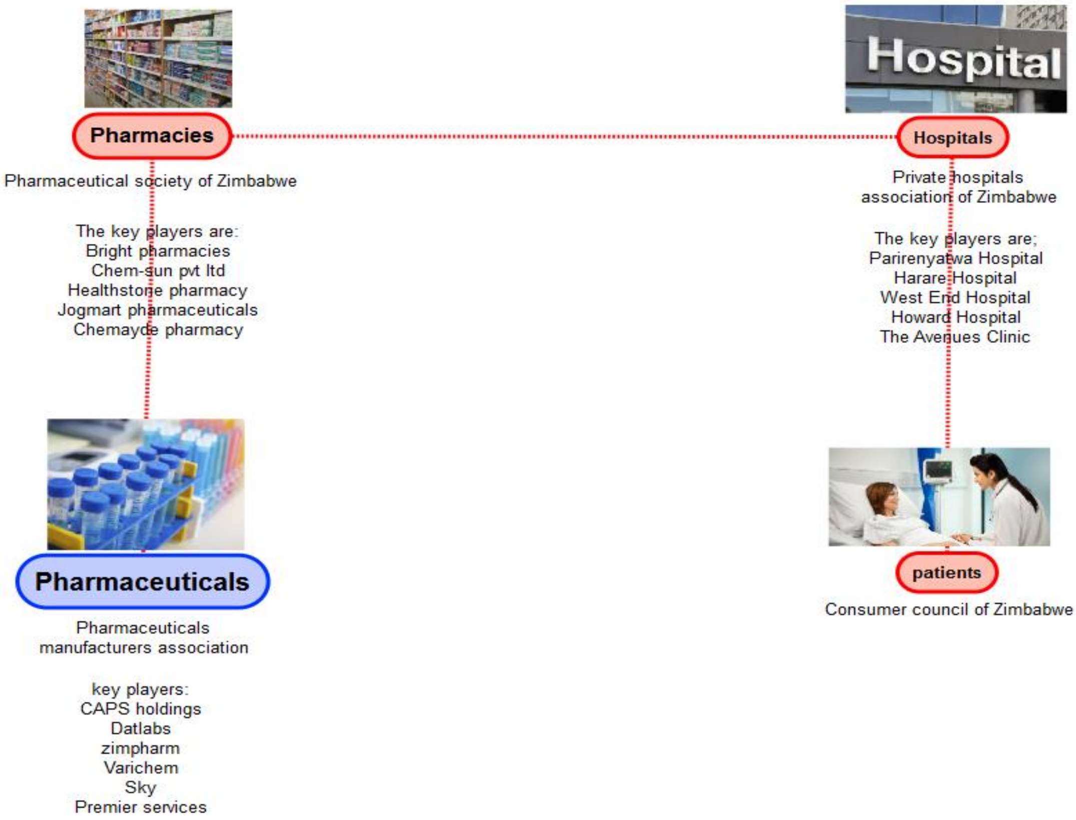

Figure 3: The Pharmaceutical Value Chain in Zimbabwe (Source: Bulawayo Provincial Industrial Development Strategy, 2024)

The pharmaceutical industry has been prioritised under Zimbabwe's industrial recovery strategy because of its strategic importance to national health security and high potential for economic growth. The approximately US$400 million (MCAZ, 2025) local pharmaceutical market experienced tremendous growth, with locally produced medicines rising from 15% to 36% in 2025 increasing capacity utilisation from 12% to 51% in 2024 (Herald, 2025). The number of pharmaceutical manufacturers increased by 56%. With key pharmaceutical companies and distributors such as Datlabs (Pvt) Ltd, Zimbabwe Pharmaceuticals (PVT) Ltd, MediHealth Pharmacy, Winters Pharmaceuticals and Pharmaceutical and Chemical Distributors (PCD), a leading national distributor with presence in Bulawayo, production and marketing infrastructure support in Bulawayo for the pharmaceutical value chain and low-hanging fruit cannot be doubted. Despite being affected by the sector's growth and challenges, like economic volatility and reliance on imports that negatively impact negatively employment, the sector employed 380 workers in 2024 (CZI, 2024). The key aspects of pharmaceutical sector employment include limited local industrialization affecting local drug manufactures output and a suppressed growth potential. Hence the government initiatives such as the 2021-2025 pharmaceutical industrialization strategy aimed at boosting local production, potentially influencing employment levels in the country.

Developing the Agro-based Value Chains

The agro-based value chains play a significant role in Bulawayo's provincial economy, contributing to economic growth, employment and food security. The agro-based value chains can be developed to enhance market linkages, promote local sourcing and connect farmers to markets. Initiatives such as the Market Aggregation Linking markets and Innovation (MALII) project by the Bulawayo Vendors and Traders Association (BVTA) was set up to improve access to markets for smallholder farmers are commendable. The government regulations requiring millers, stockfeed producers and processors to prioritize locally sourced raw materials to boost food sovereignty and industrial self-reliance are commendable initiatives. Particular attention should be paid to value chain efficiency, analysis and development where organisation such as the

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United Nations Industrial Development Organisation (UNIDO) use the concept of value chain analysis to enhance understanding of the value chain structure and functioning as well as identify project interventions for agro-industrial development. A thriving urban agriculture industry in Bulawayo challenges Councillors to review the urban farming policy towards transforming agriculture into a resilient, inclusive and sustainable food system (Sithole et al., 2012). Leveraging policy and partnerships require government support and regulations pushing for localisation of value chains and food self-sufficiency through regulations such as statutory instrument 87 of 2025. Collaboration with multi-stakeholders is necessary as transforming urban agriculture requires integrated support from the public, private sector and agro-innovation experts and non-governmental organisations (NGOs).

Developing Beef/Milk/Leather Value Chains

The United Nations Industrial Development Organization argues that leather is a widely traded commodity within the growing world trade, currently estimated at more than US$100 billion a year. However, despite owning a fifth of the global livestock population, African countries, account for only 4% and 3.3% of world leather production and value addition, respectively. The Bulawayo leather industry is a significant global manufacturing sector dominated by the Small and Medium Enterprises (SMEs), which produce raw, processed and intermediate leather materials for the production of footwear, handbags, belts, furniture, automotive seating, soft gloves and contemporary clothing, among others. The leather and leather products have traditionally been gateways to export diversification and export-oriented industrialization for most developing countries, due to low entry barriers characterised by low fixed costs and relatively simple technology, low absorption by local markets and is generally labour-intensive nature as shown in Figure 4 below.

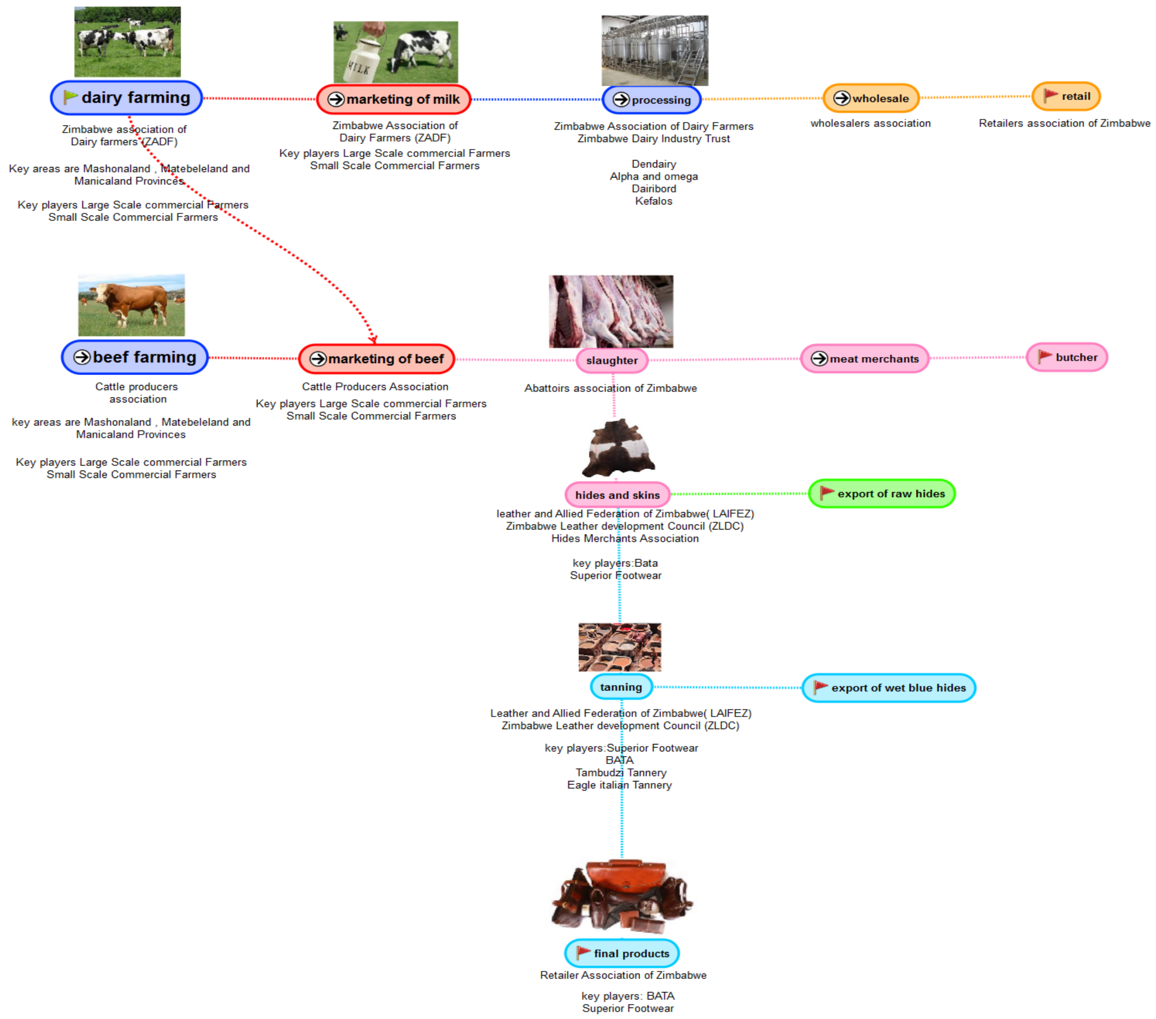

Figure 4: The beef/milk/leather and leather products value chain in Zimbabwe (Source: Bulawayo Provincial Industrial Development Strategy, 2024)

Zimbabwe was ranked 167 and 73 in 2020, out of 195 countries, in terms of exports and imports of raw hides and skins, valued at about US$2.7 million and US$31 million, respectively; indicating a net importation of hides and skins, yet with massive potential to turn the tables and eliminate this trade deficit (National Competitiveness Commission, 2023). This industrialisation of quality leather and leather products is deeply anchored in the history of Bulawayo as a major leather production hub producing 8 million pairs of shoes in the 1990s and a long tradition of craftsmanship for value addition that provided a solid reputation across Africa.

The clothing, textile, footwear and leather (CTFL) value chain is a critical part of industrialisation. Appropriate utilisation of the CTFL could create jobs and improve export performance. The CTFL sector peaked in 2001, employing 35 000 people and making significant contributions to GDP and exports. The sector has however declined due to perennial challenges of import competition, high production costs and a shortage of skilled workers. The current employment at around 4 000 workers and as of 2015, capacity utilisation was 34%. Plans are underway by the Bulawayo Leather Cluster through the construction of a factory with a capacity to produce about 158,400 pairs of shoes. The Zimbabwe Leather Sector Strategy (2021-2030) is in place which among other objectives seeks to increase capacity utilisation of value-added leather products from 30% to 75% by 2030. Retooling and recapitalizations of the local textile industry is key for the sector to improve contribution to the country's gross domestic product and ultimately sustainable economic growth.

Developing Mineral-Based Value Chains

Zimbabwe is endowed with vast mineral resources that could be extracted for sustainable economic growth and Bulawayo is richly endowed with various mineral products particularly gold. The mineral sector with gold as the main driver contributes approximately 40 percent to mineral revenue in Zimbabwe which is about 60% of total exports. Major exports from the mining sector include gems and precious metals, platinum group metals, lithium, gold, nickel and diamonds and the major destinations are Asia, Africa and Europe accounting for 59.8%, 35.4% and 4% of exports respectively. The top export destinations in 2024 were the United Arab Emirates, South Africa and Mainland China at 36.6%, 27.6% and 17.3%, respectively and India and Belgium and other countries account for the remaining 28.5%. Whilst the mineral sector is positively contributing to the fiscus, it is prone to illicit flows through smuggling, illegal dealing, corruption, fraud, tax evasion and externalization that have siphoned an estimated US$1.8 billion of revenue annually (Ministry of Finance, 2015). The Matebeleland regions are rich in gold, coal, tin, gas and lithium, hence a huge potential for mineral value addition and beneficiation. Government and private sector can develop and strengthen value chains to propel provincial growth and the enrichment of the manufacturing sector.

Securing Public Private Partnerships

Secured Public Private Partnerships help bridge infrastructure gaps, attract private investment, creates opportunities for innovation while enhancing economic growth. Senior managers interviewed supported the idea of Bulawayo City Council securing public private partnerships especially at this critical period of resource constraints and economic meltdown. Twenty eight percent of the respondents agreed that business can enter into mutual partnerships with the City of Bulawayo in costing utilities and also with banks and government on infrastructure renewal. The government of Zimbabwe at independence in 1980, inherited a solid and well maintained industrial sector courtesy of the Federation of Rhodesia and Nyasaland (1953-1963) as well as the UDI government (1964-1980). The government then embarked on pro-poor economic policies purportedly to redressed colonial imbalances which among other negative outcomes led to economic decline especially in industrialisation started witnessing the closure and relocation of foreign owned companies back to parent countries. Industrial and agricultural output further slumped to negative output and employment levels following the 2000 fast track land reform programme. The once vibrant industrial smoke characteristic of Bulawayo metropolitan province also disappeared as major business premises became worship centres or derelict empty and sombre shells. Government has however made an explicit undertaking to reindustrialise the City by lending support for critical skills and capital for infrastructure renewal necessary to attract local and international investors. Public Private Partnerships face risk of poor credit ratings, capacity constraints, corruption and a culture of lack of concern for infrastructure maintenance, all need to be addressed to achieve successful bridging finance through PPPs.

The Revision of Utilities Costs

The high cost of utilities presents another setback facing not only Bulawayo industries but other cities as well. The recent revision of fees in the transport sector is testimony of a number of charges and prices that need revision as they are stifling rather than promoting business. These utilities costs scenarios need urgent review for companies in Bulawayo and the rest of the country to be regionally and internationally competitive. Recently the Finance Minister announced significant reductions and eliminations of permits and fees across various sectors in Zimbabwe as part of the government's “Ease of Doing Business” programme. The objectives and expected outcomes of this government intervention included the need to improve the business environment by lowering operational costs, enhance competitiveness and attract both local and foreign direct investment. The move also supports Zimbabwe's goal of achieving an upper middle-income society by 2030. The permits and fees reduction exercise would be extended and rightly so to tourism, transport, retail, and other sectors so that ultimately the country would benefit from the membership of the, Southern Africa Development Community (SADC) and the Common Market for East and Southern Africa (COMESA) and the Africa Continental Free Trade Area (AfCFTA). All utility and service delivery institutions such institutions such as the Bulawayo City Council (BCC), Zimbabwe National Water Authority (ZINWA) and Zimbabwe Electricity Supply Authority (ZESA) among others should be encouraged to rationalise permits and fees to promote industrial growth. Similar studies done a researcher Chinjova (2019) alludes that high utility costs in Bulawayo industrial parks of Belmont and Donnington has been dampening growth.

Reviving, Retooling and Re-equipping the National Railways of Zimbabwe

Several factors drive the reviving, retooling and re-equipping the National Railways of Zimbabwe (NRZ) and these include economic growth and development, efficient transportation, job creation and poverty reduction, regional integration and trade, infrastructure modernization and environmental benefits. Bulawayo is the headquarters of the NRZ that has an excellent railway line linking South Africa, Botswana through Plumtree and Zambia through Victoria Falls border posts. There has been substantial deterioration in the railway network in the past decade precipitated by an aging track, insufficient ballast rail wear, deteriorating earthworks and obsolete rail signaling and communications equipment and lack of spare parts. Investment is required to refurbish existing railway system, acquisition of new locomotives and electrification of the railway system. Revival of the railways is vital for the ease of movement of goods and services to SADC, COMESA and Afro-Asian markets. Seventy senior management respondents expressed the benefit of having the railways as a huge cargo mover at cheaper cost and linked to regional and international markets. They argued about the possibility of reviving and rekindling the state of art railway system capacitated with the right calibre of managers meritoriously recruited at all levels tasked to run the railways as a critical public business entity.

Zimbabwe Government Support

In seeking to reduce the country credit risk by clearing outstanding arrears to multilateral lenders in order to unlock fresh capital, the government has indicated a growing political will to resuscitate the local industry and has courted businesses as strategic partners. Local industries support coming with various incentives can be extended through duty rebate on capital equipment, repositioning of the import substitution and development strategies for the benefit of local industries, particularly those located in Bulawayo. Approximately 25% of senior management expressed the vitality of government support towards the re-industrialisation of Bulawayo. These senior managers unanimously agreed that the more than tenfold downsizing of industry precipitated the closure of industries, flight of capital and migration of skilled labour force to the diaspora. Settling the USD16 billion debt owed to international lenders by government, should unlock fresh capital for spearheading the 4th Industrial Revolution and open new credit lines in an economy dry of cheap funding (National Budget, 2025). As part of government support, the economic policy mix should be characterised by efficiency and consistency through policies aligned towards growth estimates of the 4th IR.

The economic integration of the Small to Medium Enterprises

SMEs are key in reviving Bulawayo’s industrial sector, leveraging agility and innovation to drive economic growth through support for formalization, building capacity and training, improving access to finance, promoting market linkages as well as adopting technological innovation. The economic decline since 2000 was the unintended outcomes of the government populist policies associated with the FTLRP (Techfin Research, 2006). Huge levels of unemployment directly fed into the already ballooning informal economy as citizens struggled to find income generating activities for household survival. During the period 2009-2011, the economy enjoyed temporal stability of macroeconomic fundamentals but the liquidity crunch caused failure of big companies to recover. Zimbabwe became the most informalised country in Africa and second from Bolivia globally (Median & Schneider, 2018). ZIMSTATS economic census (2025), indicated that 76% percent informalisation of the economic activities in 2025. SMEs have since become the engine of economic activity in Zimbabwe and their participation highly integral for national development (Nyathi & Chikwala, 2024). Informal sector activities by their nature are difficult to reign into the government revenue collection and compliance system. However, real industry revival and retooling do not lie in formalising the informal sector but in development and implementation of strategies that will lead to "go for broke" investments to resuscitate and create new large scale companies. Government driven retooling schemes such as the one halted and replaced VAT deferment in July 2022, that saw about 200 Bulawayo companies acquiring equipment and technology that enhanced efficiency, increased production and employment should be re-introduced (MIC, 2023). Government and stakeholder roles of policy support, collaboration and partnerships as well as tacking infrastructure deficits, water and sanitation problems and governance reforms are necessary for integrating SMEs into the mainstream economy.

The Enhanced Import Substitution Industrialisation Strategy

Several sub-Saharan African countries have employed the import substitution industrialization (ISI) strategy to promote local industries, increase self-sufficiency and reduce dependence on foreign production systems (Ocorian, 2018). Zimbabwe alongside Ghana, Nigeria, Kenya and Ethiopia are implementing the ISI to develop local industrialisation, development and boost domestic industries. As a strategy, the economic concept of industrialisation involves the conceptualization and application of macroeconomic policies within the national space to spur the domestic production of goods and services in place of reliance on imports (Bruton, 1998 cited by Oluikpe, 2020). The ISI is a domestic economic policy aimed at replacing imports with domestic production in order to promote locally driven economic growth. This ISI strategy is synonymous with countries under sanctions as well as those with an unsustainable foreign imports bill. Zimbabwe implemented ISI policies through Statutory Instrument 64 of 2016 aimed at promoting local production following years of pressure from the Zimbabwe Democracy and Economic Recovery Act (ZiDERA), a US law enacted in December 2001, aimed at supporting democratic change, promoting economic growth and restoring the rule of law. Nigeria and South African economies incentivise local companies to ramp up production and pride themselves in the consumption of local goods. Nigeria implemented import substitution policies that mixed short-term results but strongly indicting a good long run outcome for the country. Domestic production, ticked upwards and manufacturing sector gain significant capacity expansion due to increased local demand (Oluipe, 2020). The ISI strategy usually faces challenges of systems inefficiencies, protectionism and limited market size in most developing countries and Bulawayo re-industrialisation will not be unique once affected by these.

Broadened engagement and reengagement drive

Broadening Zimbabwe's engagement and re-engagement drive is vital for the country's reindustrialisation efforts, that seek to boost economic growth, attract investments and promote industrial development. Before the economy weakened in the 1990s, Zimbabwe used to supply the European Union and Commonwealth markets with approximately 40,000 tonnes of beef per annum, making the EU a primary market for her beef exports. Zimbabwean agricultural, horticultural and floricultural exports to the EU accounted for 54% and these trade linkages positioned and stabilised the Bulawayo industrialisation sector. There was however a colossal decline of the economy characterised by plummeting industrial activity, spiralling inflation that reached 238 sextillion percent by 2008, following implementation of the 2000 Fast Track Land Reform Policy Programme (FTLRP) (World Bank, 2009). The IMF suspended the country from borrowing in mid-2001 due to a high tendency of defaults on payments (IMF, 2001). Since 2018, the government has been on a drive to revive the economy through engaging EU and Commonwealth markets capable of absorbing production output from the country's manufacturing sector including Bulawayo's industrialisation sector. The engagement and reengagement drive seeks to attract investments, technology and knowledge transfer, economic diversification, regional and global integration and industrial revival. These initiatives meant attracting foreign direct investment that was necessary for modernising industries and stimulating economic growth, reducing on a few industrial sectors like agriculture and mining, reviving and expanding industrial sectors to promote diversified exports, enhancing trade opportunities regionally and internationally as well as boosting production capacities of local industries.

The Green Industry Initiative

The Green Industry initiative is crucial for the revival of Bulawayo industries, including promoting sustainable economic growth and environmental responsibility through key aspects such as sustainable development, environmental management, support and partnerships, economic opportunities and climate resilience. The initiative focuses on resource-efficient and cleaner production, minimizing environmental impacts while boosting industrial competitiveness. The strategy shall ensure that industrial transformation is pursued for purposes of environmental sustainability and adoption of cleaner and more efficient technologies in view of the need to mitigate emerging challenges of climate change and resource scarcity. Three percent of senior management concurred that for manufacturing sector in Bulawayo to make meaningful gains, adoption green industry initiatives were necessary as most international markets now require compliance to the demands of climate and environmental changes. The relevance to Bulawayo reindustrialisation touches on local initiatives, sectoral focus as well as challenges and needs. The various stakeholders should develop projects promoting green enterprises, innovative farming (hydroponics, aquaculture) and youth empowerment. The focus should target potential growth areas such as leather, textiles, mining and engineering value chains that have been identified for development under the SEZs. The need to address the water scarcity, energy challenges and access as well as tax burdens are all necessary for industrial revival alongside embracing of green technologies.

The Role of Industrial Parks and Special Economic Zones

Industrial parks and special economic zones play a pivotal role in industrialisation efforts anywhere because they driving economic growth, attract investments and promote sustainable development. These SEZs offer tax incentives, state of the art infrastructure and streamlined regulatory development processes for the purposes of attracting both local and international investors. The SEZs should help diversify Bulawayo's economy, reduce the country’s reliance on raw commodity exports by promoting value addition in agriculture, industrialisation and services. The industrial parks and SEZs are associated with the generation of employment opportunities fostering skills development that contribute to local economic empowerment. Cases of successful SEZs include Morocco's Tanger Med SEZ, Ethiopia's Hawassa Industrial Park, Rwanda's Kigali Special Economic Zone, Mauritius' Export Processing Zones and South Africa's Coega. Evidence shows that in South Africa SEZs have led to promotion of industrial development and job creation (LGSETA, 2025). Zimbabwe designated Sunway city, Beitbridge, Belmont/Donnington/Kelvin corridor, Fernill Hill, Umvumela and Victoria Falls (Masuwe) as SEZs. The Bulawayo City Council identified virgin land in Umvumila industrial park as strategically positioned for a SEZs (ZIDA, 2025). Senior managers interviewed agreed that industrial parks are the new business philosophy and hoped that it would lead to the revival of the manufacturing sector and attract new investors with the up-to-date 4IR technologies. However, some senior managers still regard the current infrastructure as sufficient, just needing deliberate funding and other investment for refurbishment through partnership between the government and the private sector. The key success factors for implementing industrial parks and SEZs include clear objective accompanied by a well-orchestrated planning and clear goals aligned with national objectives. Other factors such as government and private sector support and involvement as well as linkages with the local economy specialization and comparative advantage are equally important.

Reindustrialization, Devolution and Decentralization Policies

The reindustrialization drive and Zimbabwe's devolution and decentralization policy is multifaceted and is aimed at boosting both local economic growth and industrial development. Devolution brings decision-making to the grassroots where policies, programmes and development plans are created and implemented (Devolution & Decentralisation Policy, 2020). Eleven percent of the respondents agreed that devolution could be a vehicle that could assist Bulawayo harness funding needed for the development necessary to ultimately spur industrial activity to previous peak levels. Section 264(1) of the Constitution states that whenever appropriate, governmental powers and responsibilities must be devolved to Provincial and Metropolitan Councils and Local Authorities which are competent to carry out those responsibilities efficiently and effectively (Constitution, 2013). In South Africa decentralisation has empowered provincial economies through nurturing industrialisation growth, job creation, infrastructure growth and provision of social services to the local population. Similarly, when reindustrialisation is well executed Bulawayo could realise such gains.

CONCLUSION

Theoretically, the study advanced the growing interest and knowledge of the role of the manufacturing sector towards economic development in developing countries by bringing together available literature in identifying knowledge gaps and exploring new directions in this field. The study concludes that effective re-industrialization of Bulawayo and Zimbabwe in general requires robust collaboration across sectors, given the central role of manufacturing in driving economic growth and development. The manufacturing sector underpins the functionality of other sectors by supplying essential equipment, inputs and requisite infrastructure. Strengthening inter-sectoral industry linkages guarantees the catalytic role of manufacturing, including broadening economic transformation in agriculture, energy, mining, transport and services. This paper buttresses the existing potential of the revival and revitalisation of Bulawayo as industrial hub of the country boasting diverse industries in food and beverages, clothing, textiles, beef, leather, dairy, pharmaceuticals, engineering, industrial chemicals, plastics and financial services in their modernised form. Limited local and international investments, lack of vigorous and effective lobbying by local and national policy lawmakers for central government to walk the talk remain a challenge.

The study recommends the following:

Government

- The government of Zimbabwe needs to deliberately craft Bulawayo Revival and Reintegration Policy through the devolution agenda. Genuine revival of industries in Bulawayo is through incentivising international and domestic investors to invest in the province.
- Moreso, business across all sectors reveal that there is over-taxation and overlapping permits, hence there is need for streamlining permits and taxes.
- There is need to vigorously promote the procuring of raw materials of high quality in Zimbabwe rather than always relying on China, the US and Europe.
- Modernised efficient industrial bases developed through investments in digital technological infrastructure that will outlive the 4th industrial revolution should ultimately be targeted through deliberate local and national industrialisation policies.

International partners

- Zimbabwe development and reindustrialisation is devoid without long term affordable finance. For local companies to compete on the African continent through AfCFTA there is need for investment on robotic machinery that improves efficiency and quality of goods.

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