



ZIMBABWE BEYOND THE LIMITS

EXPO 2025 OSAKA, KANSAI, JAPAN



TRADE OPPORTUNITIES

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About Zimbabwe

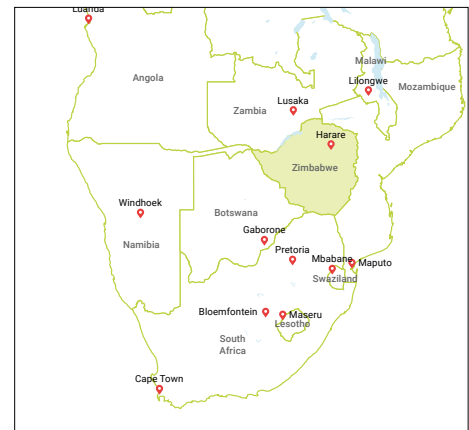
With its geographical centrality within southern Africa, Zimbabwe is a land-linked country, sharing borders with South Africa, Mozambique, Botswana and Zambia. The country covers approximately 390,757 km², featuring diverse landscapes, including highlands, savannas, and plateaus. The capital city, Harare, is the political and economic hub, while Bulawayo, the second-largest city, is a key industrial center. Major rivers, such as the Zambezi, form natural boundaries and provide hydropower through the Kariba Dam.

Zimbabwe has a tropical climate, with distinct wet and dry seasons, making it suitable for agriculture, mining, and tourism. Victoria Falls, one of the world's largest waterfalls, is a major natural attraction on the Zambezi River.

Strategic Location Within Africa

Zimbabwe's central position in Southern Africa makes it a crucial trade and transit hub. Despite being landlocked, Zimbabwe is land-linked, and has access to major regional trade corridors and benefits from memberships in key economic blocs:

- 1. Trade Corridors and Regional Connectivity - North-South Corridor:** Links Zimbabwe to South Africa, Zambia, and the Democratic Republic of Congo (DRC), facilitating trade and transport.
- 2. Beira Corridor** - Provides access to the Port of Beira in Mozambique, offering a route for imports and exports, enhancing trade with international markets.
- 3. Walvis Bay Corridor** - Links Zimbabwe to Namibia's Walvis Bay Port, offering access to the Atlantic Ocean.



Membership in Regional Trade Agreements

Southern African Development Community (SADC)

As a member of SADC, Zimbabwe enjoys:

- Preferential trade agreements with 15 regional countries, reducing tariffs and promoting exports.
- Infrastructure development support, including roads, rail, and energy projects.
- Market access to over 360 million consumers in the region.

Common Market for Eastern and Southern Africa (COMESA)

Being part of COMESA, Zimbabwe benefits from:

- Access to a larger market of over 600 million people across 21 member states.
- Lower trade barriers, boosting exports in agriculture, mining, and manufactured goods.
- Investment opportunities in regional industrialization and value-added production.

Membership in other Multi-Lateral Trade Organisations

African Continental Free Trade Area (AfCFTA)

African Union (AU)

Eastern and Southern Africa - European Union interim Economic Partnership Agreement

(ESA-EU iEPA)

Eastern and Southern Africa – United Kingdom Economic Partnership Agreement (ESA-UK EPA)

International Labour Organisation (ILO)

International Monetary Fund (IMF)

United Nations (UN)

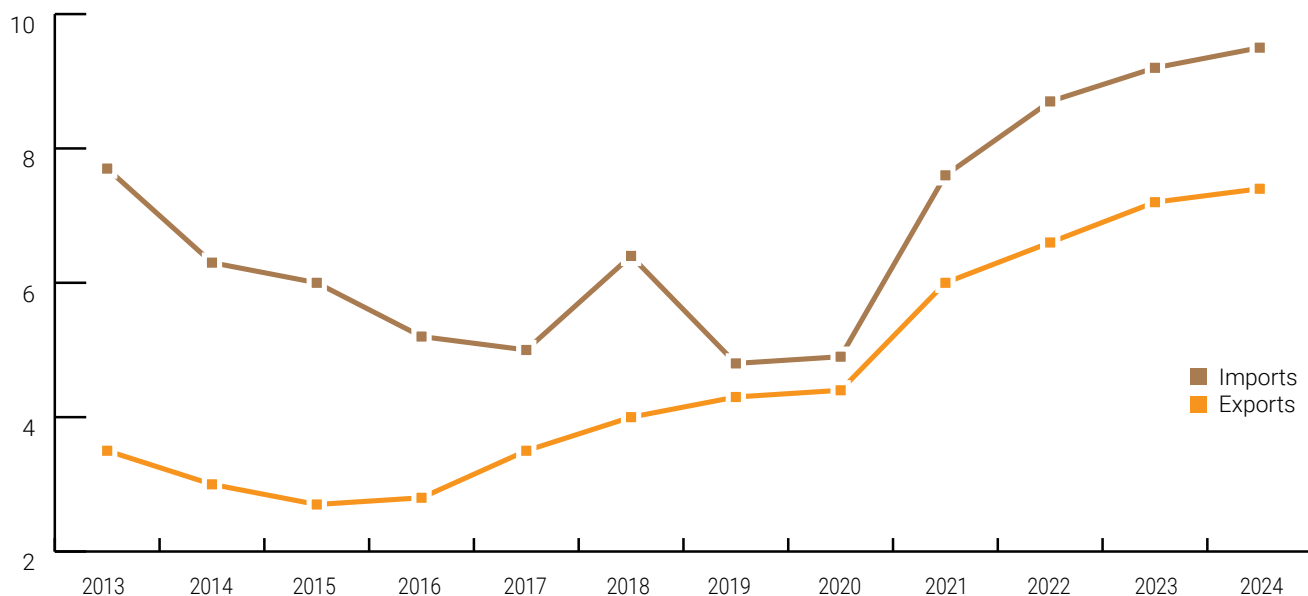
World Customs Organisation

World Trade Organisation (WTO)

Furthermore, Zimbabwe has four (4) operational preferential bilateral trade agreements under which exporters can benefit. These are:

- Zimbabwe and Botswana
- Zimbabwe and Malawi
- Zimbabwe and Mozambique
- Zimbabwe and Namibia.

Zimbabwe's Trade Performance (2013-2024)



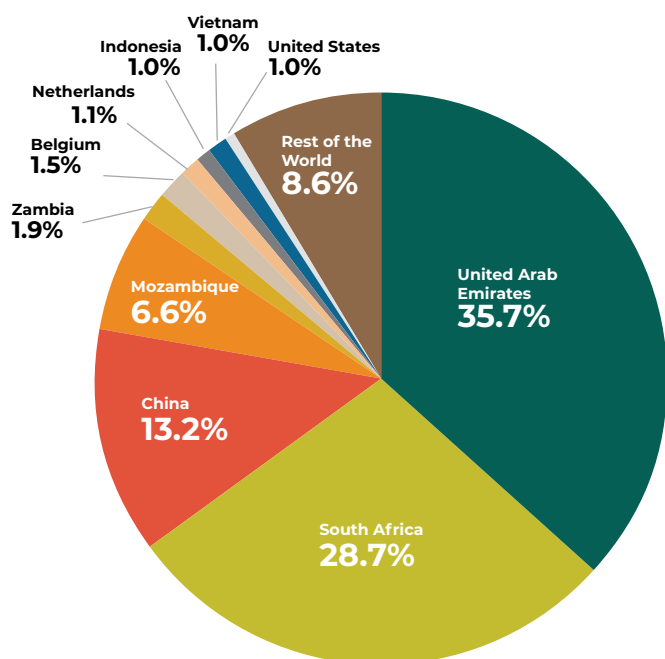
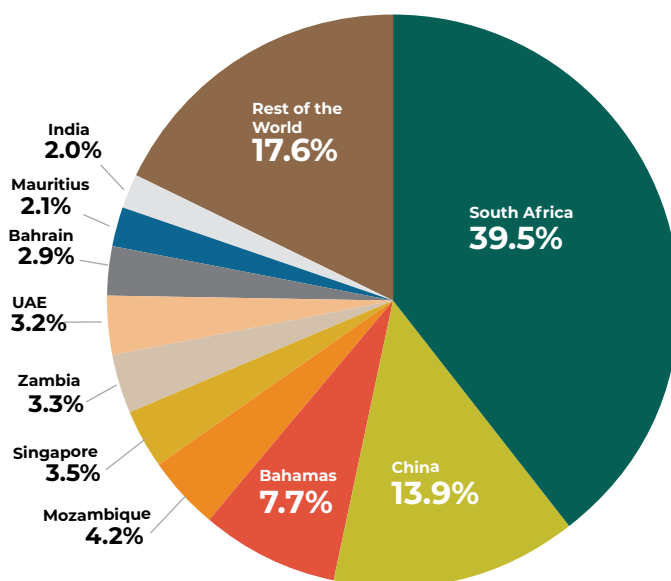
Source: ZimStat

Zimbabwe's Major Export Products (Jan - Dec 2024)

Product	Export Value (US\$)	% Share
Gold, unwrought or in semi-manufactured forms	2,524,753,692	34.0%
Unmanufactured tobacco; tobacco refuse	1,327,547,942	17.9%
Nickel mattes, oxide sinters and other products of nickel metallurgy	988,659,889	13.3%
Nickel ores and concentrates	472,207,609	6.4%
Ferro-alloys	334,502,928	4.5%
Mineral substances not elsewhere specified or included	284,893,882	3.8%
Other ores and concentrates	247,097,817	3.3%
Diamonds, not mounted or set	219,988,243	3.0%
Coke and semi-coke of coal, of lignite or of peat; retort carbon	166,995,483	2.2%
Chromium ores and concentrates	156,777,902	2.1%
Other	709,486,010	9.5%
Total Exports	7,432,911,398	100

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**Zimbabwe Major Export Destinations
(Jan - Dec 2024)****Zimbabwe Major Import Sources
(Jan - Dec 2024)**



Zimbabwe's Economic Overview

Zimbabwe, a lower middle-income economy, possesses substantial human and natural capital, positioning it for accelerated economic transformation. Leveraging its well-educated labour force, vast endowments of natural resources, and recent advancements in macroeconomic policy, alongside critical structural and institutional reforms, Zimbabwe has the potential to achieve sustained high growth and transition to upper middle-income status by 2030, as targeted by the Government of Zimbabwe (GoZ).

The country exhibits strong competitiveness in key agricultural and agribusiness value chains, particularly in sugar, cotton, horticulture, meat, and dairy. Mining is another cornerstone, with gold, platinum, diamonds and energy transition minerals, that present a strategic advantage in global markets contributing significantly to foreign exchange earnings. Zimbabwe's manufacturing sector is diverse, covering a wide range of industries that contribute to economic growth and job creation. Collectively, these industries form a robust manufacturing base that supports various sectors of the economy. Additionally, high-growth opportunities exist in Zimbabwe's services sector, encompassing banking and finance, telecommunications, retail, tourism, transport, education, and healthcare, all of which play a crucial role in economic growth and development.

With GDP expanding by 6.1% in 2022 and 5.3% in 2023, Zimbabwe is ranked among the fastest-growing economies in Southern Africa, driven by robust performance in agriculture, mining, and services fuelled by remittance inflows. However, growth decelerated to

2% in 2024, reflecting the adverse impact of El Niño-induced droughts, weaker global mineral prices and economic instability. Power shortages also contributed to decreased industrial growth and disrupted winter irrigation. The economy is expected to rebound at a growth rate of 6%, based on improved rainfall patterns, energy generation and improved mineral commodity prices in 2025.

Inflationary pressures have eased following the introduction of the Zimbabwe Gold (ZwG), yet exchange rate volatility persists, posing challenges to macroeconomic stability. Currency fluctuations continue to constrain formal sector productivity and disrupt long-term business and household financial planning. To enhance domestic demand for the ZwG and stabilize the foreign exchange market, the Reserve Bank of Zimbabwe (RBZ) has implemented several measures aimed at bolstering foreign currency reserves and reduce the divergence between the interbank exchange rate and parallel market rates.

“With GDP expanding by 6.1% in 2022 and 5.3% in 2023, **Zimbabwe is ranked among the fastest-growing economies in Southern Africa**, driven by robust performance in agriculture, mining, and services fuelled by remittance inflows. —

Agricultural Inputs, Implements & Tools



Zimbabwe's agricultural sector is a vital component of the country's economy, contributing significantly to GDP and employment. The sector has experienced growth in recent years, driven by government initiatives and investments in irrigation infrastructure. Zimbabwean agricultural inputs and implements offer a range of products and services, including seeds, fertilizers, pesticides, tractors, plows, and irrigation systems.

The main product being maize seeds, which grew from US\$2,934 million to US\$15,275 million during the same period. The major export destinations include Zambia, Mozambique, South Africa, Botswana and Malawi. The growth in agricultural inputs, implements and tools sector is due to derived demand from growth in the agriculture sector. Zimbabwe's agriculture input, implements and tools sector is projected to continue growing as Zimbabwe diversifies its export markets to other non-traditional markets such as Angola and the Democratic Republic of Congo.

According to ZimStats, the sector's exports grew from US\$22,68million in 2021 to US\$37,524 million in 2024.

In the last 4 years from 2021 to 2024, this sector has made the highest contribution to Zimbabwe's export sector in 2024 with a contribution to total exports of 0.5%. Between 2021 and 2024, Zimbabwe's major imports were dominated by machinery and agricultural equipment, which saw a significant increase from US\$944 million in 2021 to US\$1.215 billion in 2024. Fertilizers and agricultural chemicals were the second-largest import category during this period.

Opportunities and Potential Growth

The agricultural inputs and implements sector in Zimbabwe present numerous opportunities for growth and investment. Some of the key opportunities include:

Increasing demand for agricultural products

Zimbabwe's growing population and increasing demand for food present opportunities for agricultural inputs and implements suppliers.

Government support

The Zimbabwean government has implemented policies and initiatives to support the agricultural sector, including subsidies for farmers and investments in irrigation infrastructure.

Regional trade opportunities

Zimbabwe's membership in regional trade blocs, such as the Southern African Development Community (SADC) and the Common Market for Eastern and Southern Africa (COMESA), presents opportunities for exporting agricultural inputs and implements to neighboring countries.

Market Trends and Data

The demand for agricultural inputs and implements in Zimbabwe is driven by the country's agricultural sector. Some key market trends and data include:

Market size

The Zimbabwean agricultural inputs and implements market was valued at approximately US\$200 million in 2022.

Growth rate

The market is expected to grow at a compound annual growth rate (CAGR) of 5% from 2023 to 2028.

Key products

Seeds, fertilizers, and pesticides are the most in-demand agricultural inputs, while tractors, plows, and irrigation systems are the most sought-after implements.

Target market

Smallholder farmers, commercial farmers, and agricultural cooperatives are the primary target market for Zimbabwean agricultural inputs and implements.

Arts & Crafts



Zimbabwe’s art and craft sector is one of the most distinctive and culturally rich in the world. The country has a long-standing tradition of artistic expression through various forms, including sculpture, painting, basketry, textile arts, woodwork, ceramics, and beadwork. The art and craft industry in Zimbabwe is known for its unique craftsmanship, intricate designs, and cultural heritage that have global appeal.

The sector plays a significant role in Zimbabwe’s cultural preservation, tourism, and employment, especially among women and rural communities. It also contributes to Zimbabwe’s export revenues, with art and craft products being sold to international markets, including the United States, Europe, and parts of Asia.

Opportunities and Potential Growth

Export Growth and Market Expansion

Zimbabwe’s art and craft exports have a strong presence in key markets, including Europe, the United States, and Australia. As global consumer preferences shift toward unique, authentic, and sustainable products, Zimbabwe’s distinctive art and craft items, such as stone sculptures, woven baskets, wood carvings, and paintings, hold significant market potential.

Opportunities for export growth lie in reaching untapped markets in Asia, especially Japan, where traditional African art and craft are gaining recognition. The Osaka 2025 World Expo will provide a platform to introduce Zimbabwean art and craft to this dynamic market.

Artisan Capacity Building and Product Diversification

Zimbabwe can enhance its artisanal capacity through investment in training and skills development, empowering local artisans to produce high-quality and innovative products that appeal to international tastes.

Product diversification, such as creating eco-friendly and sustainable craft products (e.g., using recycled materials or organic dyes), aligns with global trends in sustainability, thus opening opportunities for Zimbabwean artisans to tap into the global eco-conscious market.

Promoting Craft Tourism

The sector is intrinsically tied to tourism, with artisan villages, cultural heritage tours, and art exhibitions attracting international visitors. By leveraging Zimbabwe’s rich cultural heritage, there are opportunities to develop tourism-related products and create new revenue streams for local communities.

The Osaka 2025 World Expo will allow Zimbabwe to position itself as a cultural tourism destination, connecting artisanal tourism with cultural exchange at the global level.

Digital Transformation and Online Marketplaces

With the rise of e-commerce and digital platforms, there is an opportunity to expand the reach of Zimbabwean art and craft beyond physical borders. By adopting digital sales platforms, such as online marketplaces (e.g., Etsy, Amazon), Zimbabwean artisans can reach a broader international audience.

Investment in digital marketing, e-commerce websites, and global logistics networks will help grow exports and enhance Zimbabwe’s global competitiveness in the art and craft sector.

Market Trends

Global Craft Market Size and Growth <p>The global market for handmade goods is growing at a steady rate, with estimates showing the global craft market to be valued at \$400 billion and expected to grow at a CAGR of 8-10% over the next 5 years.</p>	Zimbabwe’s Export Performance <p>Key export destinations for Zimbabwe’s art and craft products include South Africa, Ethiopia, United States, Germany, and the United Kingdom, where there is a steady demand for African art and cultural artifacts.</p>	Consumer Preferences <p>Studies show a growing trend among consumers, especially in developed markets like Europe and the U.S., who increasingly prefer products that are handcrafted, authentic, and culturally significant.</p>	Tourism and Cultural Heritage Impact <p>Zimbabwe is home to several UNESCO World Heritage Sites such as the Great Zimbabwe Ruins, Chinhoyi Caves and Mana Pools National Park, making it an attractive cultural tourism destination.</p>
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ZIMBABWE'S TRADE OPPORTUNITIES
EXPO 2025, OSAKA

Pharmaceuticals



The pharmaceutical industry in Zimbabwe is a vital and rapidly evolving sector that plays a crucial role in the nation's healthcare system and economic development. As one of the key contributors to the country's economy, the industry is responsible for providing essential medicines and healthcare solutions to meet the needs of the Zimbabwean population.

The sector is characterized by a blend of local manufacturers, importers, and distributors catering to domestic demand. Over recent years, the industry has experienced significant growth and transformation, influenced by technological advancements, a growing and aging population, and rising disposable incomes. These factors have collectively increased the demand for pharmaceutical products across the country. The Zimbabwean pharmaceutical market presents opportunities for investment and expansion. The market is segmented into prescription medicines, over the counter (OTC) drugs, and traditional herbal medicines, each contributing significantly to the overall dynamics of the industry.

Regulatory Environment and Government Initiatives

The regulatory framework governing the pharmaceutical industry is overseen by the Medicines Control Authority of Zimbabwe (MCAZ), ensuring the quality, safety, and efficacy of pharmaceutical products available in the market. In March 2021, Zimbabwe became the 19th African Union (AU) member state to sign the African Medicines Agency (AMA) Treaty, which aims to enhance regulatory processes and support government initiatives. This commitment fosters a favorable regulatory environment for pharmaceutical research and development, local production, and trade across African countries. Another initiative is the Pharmaceutical Manufacturing Strategy (2021–2025), launched in June 2021, and aimed to increase local drug production, increase the availability of essential medicines, and promote the export of surplus pharmaceuticals. It focuses on improving manufacturing capacities and ensuring compliance with international standards.

Opportunities and Growth Potential

Zimbabwe has been making significant strides in exporting pharmaceutical products, with exports reaching US\$4.54 million in 2023, according to the Trade Map database. The country is implementing the Pharmaceutical Manufacturing Strategy (2021–2025) to enhance local pharmaceutical production and export capabilities. The main products being exported include medicaments containing antibiotics (93%), as well as human and animal blood prepared for therapeutic, prophylactic, or diagnostic uses (7%). However, over the past decade, exports of some pharmaceutical products, such as mixed-constituent medicaments, wadding, gauze, bandages, and dried glands for organo-therapeutic uses, have declined.

The global pharmaceutical market presents significant opportunities for Zimbabwean exporters. Statistics from Trade Map show that in 2023, the total value of imported pharmaceutical products worldwide reached US\$863.6 billion, with key categories including medicaments for therapeutic or prophylactic use (US\$490 billion), human and animal blood products (US\$340.2 billion), and mixed-constituent medicaments (US\$18 billion). There is also steady demand for wadding, gauze, and bandages (US\$10.5 billion) and dried glands for therapeutic uses (US\$4.9 billion). Given the global demand, Zimbabwe has an opportunity to increase its exports by focusing on antibiotics, blood products, and specialty pharmaceutical formulations. Additionally, revitalizing the production of declining product segments could further strengthen the country's market position.

Zimbabwe's pharmaceutical exports are currently concentrated in regional markets, with Botswana, South Africa, Namibia, Zambia, and Senegal being the main destinations. Botswana imported US\$1.68 million in 2023, while South Africa saw a significant 57.8% increase in imports from Zimbabwe, reaching US\$1.36 million. Namibia and Zambia also showed steady growth, and Senegal emerged as a new export destination. However, Zimbabwe's presence in European markets remains minimal, with only US\$1,000 worth of pharmaceutical exports to the United Kingdom in 2023. This underscores a significant untapped potential for expansion into European markets.

Competitive Advantage

Zimbabwe's pharmaceutical industry is strategically positioned to enhance its competitive advantage in both production and trade. The government's support commitment is evident through the Pharmaceutical Manufacturing Strategy (2021–2025), which aims to increase the market share of locally manufactured pharmaceutical products from 12% in 2020 to 35% by 2025. This initiative also seeks to boost local production of essential medicines from 30% to 60% within the same timeframe, elevating the sector's revenue from approximately US\$31.5 million to US\$150 million annually.

A significant milestone in emphasizing Zimbabwe's credibility in the global pharmaceutical market is the Medicines Control Authority of Zimbabwe (MCAZ) achieving Maturity Level 3 status from the World Health Organization. This recognition underscores the country's capability to produce medicines that meet international standards, enhancing its export potential.

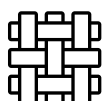
Heritage-based Products



Zimbabwe's heritage-based products are deeply rooted in the country's cultural traditions, agricultural practices, and natural resources. These products reflect the rich diversity of local communities and offer a unique blend of authenticity and craftsmanship. As global interest in authentic, sustainable, and ethically sourced products rises, Zimbabwe's heritage-based products are poised to capture a significant share of the international market.

The sector includes a wide range of products, from handwoven textiles and traditional pottery to organic food items and artisanal crafts. These products are not only a source of cultural pride but also an important avenue for local economic development and empowerment, especially for rural communities. By tapping into global trends favoring sustainability, fair trade, and artisanal craftsmanship, Zimbabwe has the potential to expand its presence in international markets.

Heritage-based products contribute to both the economy and the preservation of Zimbabwe's cultural identity. Many of these products are made by smallholder farmers, local artisans, and cooperatives, promoting inclusivity and supporting sustainable livelihoods. The government and various non-governmental organizations have also initiated programs to preserve traditional knowledge and techniques, while also providing training in design and marketing to help local artisans meet global market demands. Zimbabwe's heritage-based products can be categorized into the following:

**Handmade Textiles**

Traditional handwoven fabrics, including items like the famous Shona and Ndebele Batique (a printed cotton fabric), basketry, and garments.

**Traditional Herbal Products**

Herbal medicines and organic food products, often grown using traditional methods, such as baobab fruit, moringa, and honey.

**Pottery and Ceramics**

Artistic pottery, sculptures, and functional ceramic products inspired by local culture and traditions.

**Handcrafted Jewellery and Beads**

Jewellery made from locally sourced materials, including beads, metals, and stones, with designs reflecting indigenous traditions.

**Woodcraft and stone carvings**

Intricate wood and stone carvings, sculptures, and household items crafted by local artisans.

**Essential Oils**

Oils from Indigenous fruits, trees, and plants, processed through traditional ways and modern ways.

**Processed Products**

Indigenous and native fruits have been processed into various wines and juices, butters and spreads. The baobab juice, mapfura wine are flagship products that have done well in the local and export markets.

Opportunities & Growth Potential

Zimbabwe’s heritage-based products have significant growth potential, especially as global markets increasingly value cultural authenticity and sustainability. Key opportunities include:

Market Expansion

There is a growing global demand for authentic, handmade products, particularly in markets like Europe, North America, and Asia. Zimbabwe’s heritage-based products can be marketed as unique, ethically sourced, and sustainably produced alternatives to mass-produced items.

Cultural Tourism & Experience

The integration of heritage products with cultural tourism can be expanded, offering tourists not only products but also immersive experiences that highlight Zimbabwe’s traditions and craftsmanship.

Sustainability & Eco-Friendly Markets

With the rise of eco-conscious consumers, Zimbabwe’s use of natural, sustainable materials and methods is a competitive edge. There is increasing interest in products that are organic, fair-trade certified, and produced with minimal environmental impact.

Training and Capacity Building

Investment in skills training and capacity-building programs for artisans can help improve product quality and marketability, enabling local producers to meet international standards and demand.

Branding and Marketing

There is a need for effective branding and marketing strategies that highlight the cultural and heritage aspects of Zimbabwe’s products. This includes positioning products as luxury or niche items that represent a deep connection to Zimbabwe’s history and people.



Market Trends & Data

The exports for essential oils reflect varying trends, with the most significant drop in 2019, when export value declined to US\$1 million, followed by a sharp recovery in 2021 with a 157% increase. Another notable rise occurred in 2023, following a decrease in 2022, indicating that Zimbabwe’s heritage-based product sector remains dynamic and resilient. Despite the fluctuations, the overall positive growth trajectory underscores the increasing demand for Zimbabwe’s unique heritage-based products on the international market, highlighting the sector’s potential for further development in essential oils.

South Africa, the United States of America, Ethiopia, Spain and the United Kingdom remain amongst the top export destinations for articles of coming from Zimbabwe. As shown above, the sector is on an upward trend as a result of consolidated efforts to export by different art groups.

Zimbabwe’s heritage-based products sector is on an accelerated growth trajectory, offering significant opportunities for investment, global trade partnerships, and export expansion. With its rich cultural heritage, unique craftsmanship, and high-quality artisanal products, Zimbabwe is poised to become a key player in the global market for heritage-based goods. The country’s distinctive products, rooted in tradition and innovation, are in increasing demand worldwide.

Furniture & Timber



Zimbabwe's furniture and timber industry, once a significant export contributor, is currently characterized by a reliance on plantation-grown softwoods, primarily pine, with large state-owned companies like Allied Timbers dominating production, although facing challenges from outdated technology, competition from imported furniture, and concerns regarding timber waste management; despite this, the industry still holds potential for growth through improved efficiency, export market development, and sustainable practices.

Most timber comes from plantation forests, mainly softwoods like pine, which allows Zimbabwe to be self-sufficient in industrial timber and even export some products. The industry primarily produces sawn timber, which is then used for furniture manufacturing, doors, and other wood products. While the potential for export exists, the industry faces competition from cheaper imported furniture, limiting its export earnings. Forests, woodlands, bushlands, and wooded grasslands cover about 55 per cent of Zimbabwe's land area and are made up of indigenous forests and plantations of exotic commercial species. Zimbabwe is dominated by the dry miombo woodland, which covers more than 17 million hectares

According to the Food and Agriculture Organisation (FAO), Zimbabwe lost 37 percent of its forested land to deforestation between 1991 and 2015. This has severely impacted the production of indigenous wood, which commands higher prices on the export market. Zimbabwe produces various timber products, including sawn timber, veneer, plywood, fibreboard, pulp and paper, furniture, and engineered blocks. A significant percentage of these products are exported to regional and international markets.

In 2020, Zimbabwe's total wood product exports reached US\$15,6 million, with Botswana being the largest importer, purchasing US\$5,5 million worth of products. Other key importers included Zambia (US\$3,9 million), South Africa (US\$3,2 million) and Mozambique (US\$2,9 million). Exports of wood (sawn or chipped lengthwise) in 2020 totalled US\$6,4 million, an 18.5 percent increase from 2019's US\$5,4million. Veneer exports in 2021 were valued at US\$199 000, with China importing US\$141,000 and South Africa US\$41,000.

A significant issue in the industry is the high level of timber waste generated during processing, due to outdated technology and inefficient practices. Initiatives to upgrade technology, promote sustainable practices, and develop export markets could significantly improve the industry's performance.

Regulatory Environment and Government Initiatives

The Zimbabwean government has implemented several regulations and initiatives to support the timber and furniture sector which include

Collective Bargaining Agreements: The National Employment Council for the Furniture Manufacturing Industry has established collective bargaining agreements to regulate employment terms and conditions. These agreements cover various job classifications and ensure fair labour practices.

Duty Rebate for Furniture Manufacturers: To boost the furniture manufacturing sector, the government introduced a duty rebate on goods imported by furniture manufacturers. This initiative, outlined in Statutory Instrument 187 of 2024, aims to enhance capacity utilization, attract investment, and increase employment opportunities. Approved manufacturers must be registered with the Zimbabwe Revenue Authority (ZIMRA) and comply with specific reporting requirements.

Timber Processing and Trading Regulations: The National Employment Council for the Lumber Milling, Timber Processing, and Trading Industry has also established collective bargaining agreements to regulate the sector. These agreements ensure fair labour practices and support the sustainable management of timber resources.

Opportunities and Growth Potential

The furniture and timber sector in Zimbabwe presents significant growth potential due to a readily available timber resource base, rising local demand for quality furniture, and increasing export opportunities to neighbouring countries, particularly with a focus on value-added products and improved design capabilities to tap into wider international markets; however, challenges like outdated technology, limited access to finance, and inconsistent quality control need to be addressed to fully realize this potential.

<p>Growing Local Market</p> <p>Zimbabwe’s growing middle class is driving demand for higher-quality furniture, creating a market for locally manufactured products with modern designs.</p>	<p>Export Potential</p> <p>Neighbouring countries like South Africa, Botswana, Zambia, and Mozambique present significant export markets for Zimbabwean timber and furniture products.</p>	<p>Value-Added Products</p> <p>Moving beyond basic sawn timber to produce value-added products like veneer, plywood, and finished furniture can significantly increase export earnings.</p>	<p>Sustainable Forestry Practices</p> <p>Implementing sustainable forestry practices can attract environmentally conscious consumers and enhance market access.</p>
<p>Ecotourism and Handicrafts</p> <p>Integrating local timber into eco-friendly furniture and handicrafts can cater to the growing market for sustainable tourism products.</p>	<p>Innovation and Design</p> <p>Developing modern and innovative furniture designs can improve competitiveness in the global market.</p>	<p>Government Support</p> <p>Government initiatives to promote the sector through export incentives, capacity-building programs, and access to finance can accelerate growth.</p>	

Competitive Advantage

The furniture-manufacturing sector in Zimbabwe boasts of an abundant timber supply source; thus, the cost price of the critical raw material is low for SMEs. Given such a setup, motivation to save on material becomes a secondary issue. Zimbabwe’s commercial timber industry is concentrated in the Eastern Highlands of Zimbabwe in Manicaland, which is the province with favourable climatic and environmental conditions for the fast-growing exotic tree species. Manicaland is home to several types of wood that can be used for structural purposes in building and construction, treated and untreated poles for transmission lines, hardwood for furniture manufacturing, and industrial wood for packaging, pallets, and cable drums. Current producers in Manicaland employ internationally recognised forest practices and this has resulted in some of the highest quality and sustainably managed plantations in Africa. With excellent soils and climate, Manicaland has produced timber that is highly sought across the region

Overall, the furniture and timber sector in Zimbabwe has the potential for significant growth, particularly if stakeholders focus on developing value-added products, improving design capabilities, and leveraging the country’s natural timber resources through sustainable practices to access wider export markets. In Zimbabwe, the Furniture market generates a revenue of US\$227.8m. It is projected to experience an annual growth rate of 5.79% (CAGR 2025-2029). The largest segment within this market is the Living Room Furniture segment, which has a market volume of US\$79.19m.

Chemicals, Soaps & Cleaning Products



The chemicals, soaps, and cleaning products industry in Zimbabwe is a key sector that plays a vital role in domestic and regional markets. This industry encompasses the manufacturing and distribution of soaps, detergents, waxes, and other surface-active agents essential for household, industrial, and institutional hygiene and maintenance. Additionally, it has applications across multiple industries, including manufacturing, agriculture, mining, and healthcare.

Zimbabwe's chemical exports, both inorganic and organic, have demonstrated varying levels of success across different markets. The total export value of inorganic chemicals peaked at USD 2.281 million in 2023, a substantial increase from USD 507,000 in 2020. Organic chemical exports have also grown, reaching USD 1.316 million in 2023, up from USD 59,000 in 2020. Key export destinations include South Africa, Mozambique, Zambia, and Mauritius. However, trade volumes remain inconsistent, with some years witnessing sharp declines due to production challenges and shifting global demand.

Opportunities and Growth Potential

Zimbabwe's export performance in the chemicals, soaps, and cleaning products industry has exhibited both positive and negative trends over the past five years. In 2023, the total export value of these products reached \$1.35 million. The primary export destinations include Zambia, Malawi, and Mozambique. Zambia accounted for the largest share, with imports totalling \$808,000, though this represents a decline compared to previous years. Malawi showed a remarkable increase in demand, reaching \$395,000 in 2023, suggesting a growing market presence. Conversely, Mozambique experienced a decline, with imports valued at \$131,000. Other regional markets, such as Botswana and South Africa, recorded minimal trade volumes, highlighting untapped potential for expansion. Furthermore, the nearly negligible exports to the United Kingdom and Germany suggest opportunities for market penetration into European territories.

A closer analysis of product categories reveals that soap and organic surface-active products dominated exports, reaching \$1.14 million in 2023. This was followed by organic surface-active agents and washing preparations, which amounted to \$122,000. Specialty cleaning products, including shoe polish, furniture wax, and scouring pastes, represented a smaller segment, with exports totalling \$73,000. Lubricant preparations had minimal export activity, reaching only \$11,000 in 2023. The mining and agriculture sectors also present significant opportunities for industrial chemical use, particularly in fertilizers, pesticides, and mining reagents. The country's cyanide exports rose from USD 83,000 in 2021 to USD 524,000 in 2023, indicating growing demand in the mining sector. The inorganic chemicals market has also shown promising trends, with exports of hydrogen and rare gases increasing from USD 51,000 in 2020 to USD 668,000 in 2023. Mozambique and the Democratic Republic of Congo (DRC) are among the largest importers of Zimbabwean chemicals, with Mozambique alone importing USD 803,000 worth of inorganic chemicals in 2023. Organic chemical exports, particularly organo-sulphur compounds, reached USD 1.122 million in 2023, with Mauritius and South Africa as key markets.

Competitive Advantage

The country's well-established mining sector provides crucial inputs for inorganic chemical production, including rare gases, cyanides, and sulphates. Additionally, participation in SADC and COMESA trade blocs provides tariff advantages and simplified trade procedures, giving local manufacturers an edge over international competitors. Government support through investment incentives and infrastructure development further enhances the growth potential of the sector.

To capitalize on emerging trends, Zimbabwean manufacturers need to prioritize investments in advanced production technologies that improve efficiency and product quality. Developing eco-friendly and biodegradable cleaning products will align with global sustainability objectives and appeal to environmentally conscious consumers. Expanding international market reach through trade agreements and active participation in global trade exhibitions, such as the Osaka 2025 World Expo, will further strengthen Zimbabwe's position in the international chemicals and cleaning products industry.

Regulatory Environment and Government Initiatives

The regulatory framework for the chemicals and cleaning products industry in Zimbabwe is overseen by relevant authorities to ensure compliance with safety and environmental standards. The Environmental Management Act (EMA) plays a crucial role in regulating hazardous substances and ensuring manufacturers adhere to strict environmental protection measures. Additionally, the Standards Association of Zimbabwe (SAZ) provides guidelines and certifications for cleaning detergents and other chemical products to ensure they meet quality and safety requirements.

To enhance the competitiveness of Zimbabwean products in regional and international markets, the government has introduced policies promoting local manufacturing and exports. Measures such as investment incentives and trade facilitation programs aim to boost the export capacity of chemical and cleaning products, fostering a more robust and sustainable industry.

Horticulture



The global horticulture market has been growing at an average annual rate of 5%, with strong demand for healthier food options. The market is projected to keep growing, driven by increased consumer awareness of healthy eating habits and organic food production.

In order to establish herself as a key player in this global industry, Zimbabwe's horticulture sector stands as one of the most dynamic and rapidly expanding industries in the country's agricultural landscape. With a favourable climate, fertile soils, and access to regional and international markets, Zimbabwe has positioned itself as a key exporter of high-value fresh produce.

The sector contributes significantly to national GDP and employment, with thousands of smallholder and commercial farmers actively involved in the production of fruits, vegetables, and cut flowers. Zimbabwe is known for premium-quality exports, including citrus

fruits, blueberries, avocados, peas, macadamia nuts, and various types of flowers.

Government initiatives, through the Horticulture Recovery and Growth Plan, have further stimulated the industry by providing incentives, financing models, and infrastructure development to enhance productivity and competitiveness in global markets.

Sustainability and traceability have also become key determinants of market competitiveness, with buyers preferring environmentally friendly and ethically sourced products and Zimbabwe plays well to these global trends given the country's preference for sustainable and natural production options and processes.

Opportunities & Growth Potential

Zimbabwe's horticulture sector presents vast opportunities for investors, exporters, and international buyers. Key opportunities include:

Export Expansion: Zimbabwe is well-positioned to increase its footprint in global markets, particularly in the EU, Middle East, and Asia, where demand for organic and sustainably grown produce is rising.	Value Addition & Agro-Processing There is significant potential for investment in agro-processing industries, including frozen and dried fruit production, juice extraction, and essential oil distillation.	Technology & Innovation Adoption of precision farming, greenhouse technology, and climate smart irrigation systems can enhance yields and improve sustainability.	Public-Private Partnerships Government incentives and collaboration with private sector stakeholders create an enabling environment for investment in cold chain logistics, packaging, and infrastructure development.	Sustainable & Organic Farming With increasing global consumer preference for organic and ethically sourced products, Zimbabwe's eco-friendly farming practices provide a strong competitive advantage.
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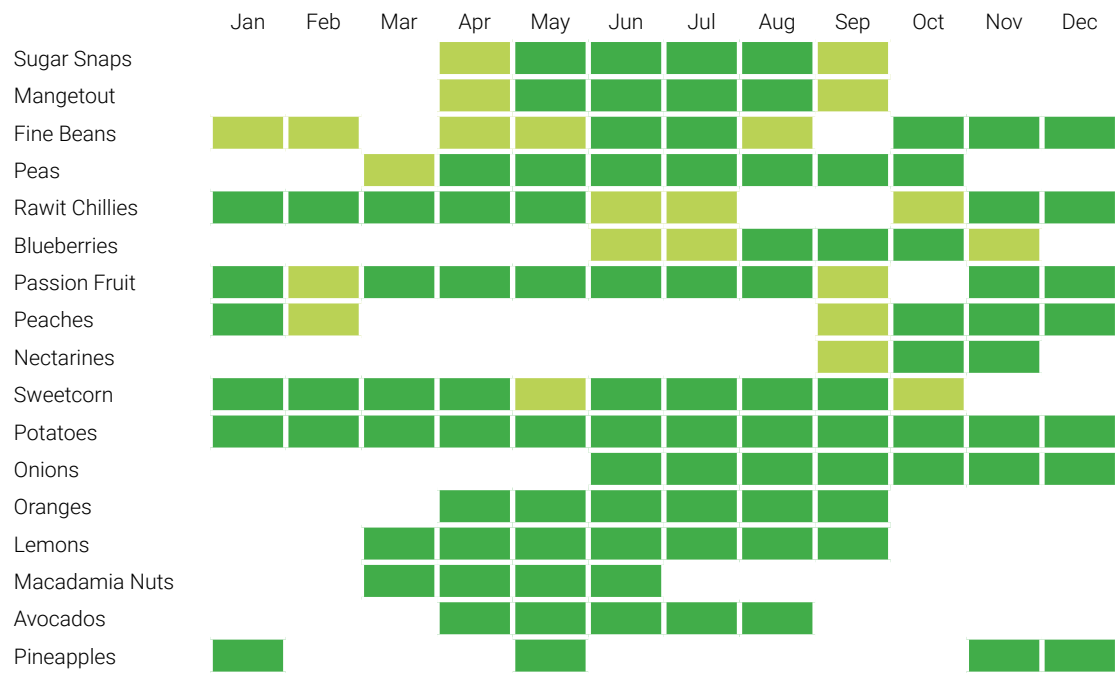
Market Trends and Data

Zimbabwe's exports of horticulture amounted to just over US\$128 million in 2023, recording a 13% increase from previous year's figures. Over the 5 years from 2019 to 2023, the country's CAGR stood at 2.45% and the country's top 10 markets were Netherlands, Hong Kong, China, Germany, France, Spain, UK, South Africa, Portugal and the UAE. Zimbabwe's exports of High Value agricultural produce have been on an upward trend over the past one and a half decades and the table below depicts the trend the country's export performance over this period.

Zimbabwe's horticulture sector is on an accelerated growth path, and this is a result of a combination of increased production of the country's common export products such as Flowers, Citrus, Avocadoes, Macadamia Nuts, as well as production and export of new products such as Blueberries, Rock Melons.

Zimbabwe's horticulture sector is on an accelerated growth path, offering immense opportunities for investment, trade partnerships, and export expansion. With its high-quality produce, strategic location, and a preference for natural growing habits, Zimbabwe is well-positioned to become a major player in the global horticulture industry.

The chart below shows a calendar of some of the produce which Zimbabwe currently exports and the respective window periods within which the country can export significant volumes of the respective products. Various other products also exist in Zimbabwe, possibly for niche markets or niche value chains.



[infographic]
top horticultural products and figures
data required.

Floriculture



Zimbabwe has long been recognized as a key player in Africa’s floriculture industry. The sector, which falls under the broader horticultural industry, has been a vital contributor to the country’s agricultural exports. With its favourable climate, abundant sunshine, and skilled labour force, Zimbabwe is well-positioned to produce high-quality flowers that meet international standards.

Historically, Zimbabwe was a significant player in the floriculture industry, with the country ranking as the second-largest exporter in the world in 2002. During its peak, Zimbabwe’s floriculture sector thrived due to a combination of favourable climatic conditions, well-established infrastructure, and strong international demand, particularly from European markets. In response, the government of Zimbabwe is actively working to revitalize the sector and restore its former prominence in the global flower market. Various initiatives have been introduced, including the promotion of private-sector investment and efforts to improve access to finance for commercial flower growers.

Additionally, the government is encouraging the adoption of modern farming techniques, including greenhouse technology and precision irrigation, to enhance the quality and sustainability of flower production.

The floriculture industry in Zimbabwe is characterized by the cultivation of a variety of flowers, with roses being the predominant export. Other flowers grown include chrysanthemums, carnations, lilies, and alstroemeria. The sector is supported by commercial farms as well as smallholder growers looking to capitalize on global demand for high-quality flowers.

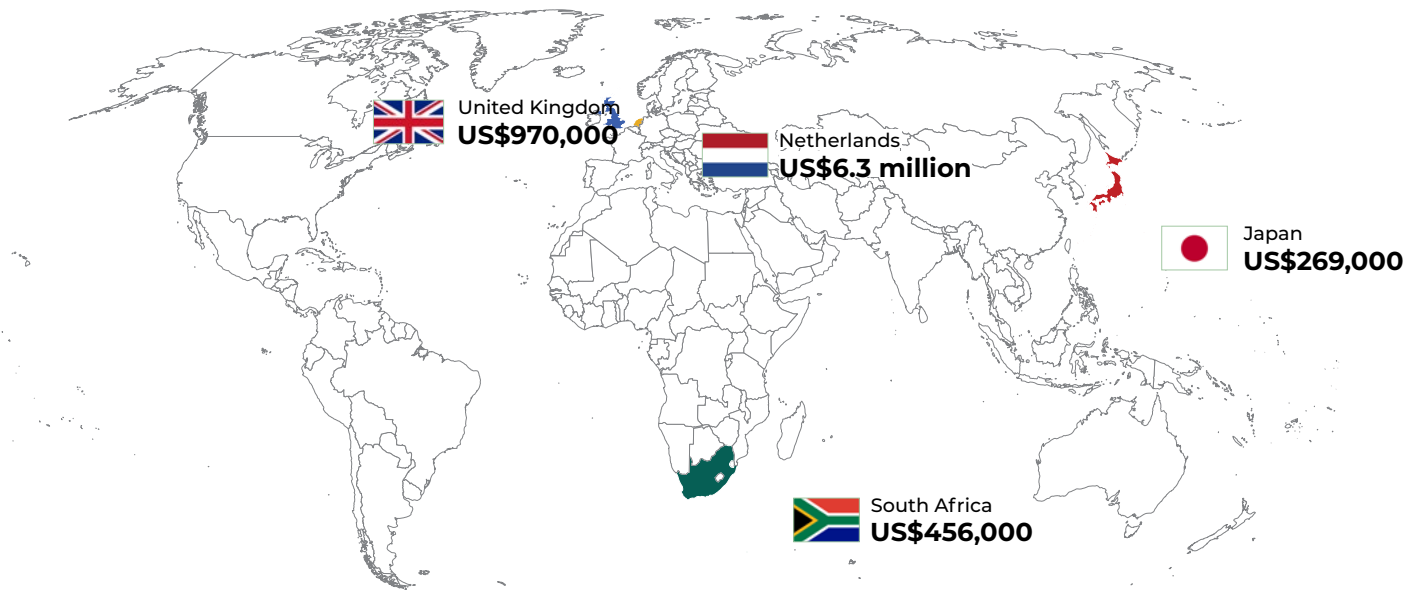
Opportunities and Growth Potential

The Zimbabwean floriculture sector presents vast opportunities for investors and stakeholders. Some of the key drivers of growth include:

Competitive Climatic and Geographical Advantage Zimbabwe’s temperate climate, combined with its high-altitude regions, provides ideal growing conditions for flowers, ensuring consistent quality and yield. The country’s ability to produce flowers when European markets face seasonal shortages gives it a competitive edge.	Expanding Global Market Demand The global floriculture market is projected to reach US\$87 billion by 2027, driven by increasing demand from Europe, the Middle East, and Asia. Zimbabwe, with its strategic positioning and historical expertise, can leverage this demand by increasing its production capacity and diversifying its flower varieties.	Trade Agreements and Market Access Zimbabwe has access to major export destinations, including the European Union (EU), the United Kingdom (UK), and South Africa. The African Continental Free Trade Area (AfCFTA) also presents an opportunity for Zimbabwean flower producers to explore intra-African trade and reduce reliance on traditional Western markets.	Investment in Modern Farming Technologies There is a growing interest in greenhouse farming, drip irrigation, and advanced post-harvest handling techniques to improve productivity and reduce wastage. Investment in these technologies will enhance Zimbabwe’s ability to meet international standards and increase yields.	Employment and Economic Impact Floriculture has the potential to create thousands of jobs across the value chain, from cultivation and harvesting to packaging and logistics. Increased investment in the sector could help alleviate unemployment and contribute to economic growth.
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Market Trends and Data

Zimbabwe’s flowers are highly sought after in Europe particularly the Netherlands, Japan and the United Kingdom. Netherlands has over the years been Zimbabwe’s primary export destination for flowers with the Dutch flower auctions still being a critical distribution hub for Zimbabwean flowers. According to Trademap, Zimbabwe exported cut flowers worth US\$9 million in 2023 with expectations to double by 2030. Netherlands was the top import market for Zimbabwean cut flowers with US\$6.3 million, United Kingdom imported US\$970 thousand, South Africa imported US\$456 thousand, and Japan imported US\$269 thousand worth of flowers.



Global Floriculture Imports

The global market for cut flowers was US\$9.86 billion in 2023 which indicated a 0.41% increase from the US\$9.82 billion realised in 2022. At its peak in 2021 the cut flowers import value reached US\$10.2 billion. These statistics indicate that the floriculture industry is a lucrative sector which presents vast untapped potential for Zimbabwean flower producers.

Zimbabwe’s Export Potential of Cut Flowers

Zimbabwe’s floriculture sector has the potential to expand its exports significantly, particularly in high-demand international markets. By targeting these high-potential markets and implementing strategic export initiatives, Zimbabwe can significantly boost its cut flower trade, increasing foreign currency earnings and solidifying its position in the global floriculture industry.

To fully capitalize on these markets, Zimbabwe’s floriculture sector should focus on investing in certification programs to meet international quality and sustainability standards, enhancing logistics and air freight capacity to ensure timely delivery of fresh flowers, and expanding market research and trade partnerships to identify emerging demand trends.

Markets with the greatest potential for Zimbabwe’s exports of Cut flowers & buds, fresh are Netherlands, United Arab Emirates and United States. Zimbabwe has closest export links with Eswatini. United States is the market with the highest demand potential for Cut flowers & buds, fresh.

Zimbabwe presents a unique opportunity to engage in a high-value, high-growth industry. With the right investment in modern infrastructure, cold chain logistics, and greenhouse farming, the floriculture sector presents immense opportunities for investors, farmers, and stakeholders. By leveraging its natural advantages, embracing modern farming techniques, and improving infrastructure, the floriculture sector can bloom into one of Zimbabwe’s major economic pillars, creating employment, boosting foreign exchange earnings, and solidifying the country’s reputation as a leading flower exporter.

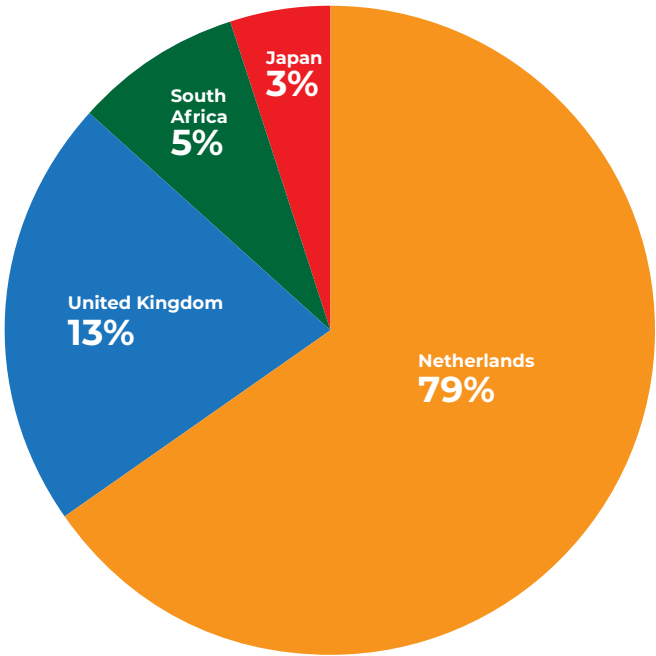


Fig 1: Zimbabwe’s floriculture exports, 2023

Clothing & Textiles



Zimbabwe's clothing and textile sector has strong potential, driven by its production of high-quality cotton, skilled workforce, and growing focus on value addition. The industry supports local and regional markets with diverse products, including garments, workwear, and traditional attire. Efforts to revive the sector through government support, local sourcing initiatives, and export-driven strategies are strengthening its competitiveness. With increasing investments in modern machinery and sustainable production, Zimbabwe is positioning itself as a key player in the regional textile industry.

Opportunities and Growth Potential

The Zimbabwean floriculture sector presents vast opportunities for investors and stakeholders. Some of the key drivers of growth include:

<p>Value Addition & Local Processing</p> <p>Zimbabwe produces high-quality cotton, yet a significant portion is exported in raw form, limiting the sector's revenue potential. Investing in local textile mills for spinning, weaving, and finishing can increase value addition, create jobs, and reduce the country's dependence on imported fabrics. By developing a fully integrated textile value chain—from cotton farming to finished garments Zimbabwe can strengthen its local industry and increase export earnings.</p>	<p>Export Market Expansion</p> <p>Zimbabwe has access to lucrative regional and international markets, particularly through trade agreements such as the African Continental Free Trade Area (AfCFTA) and the African Growth and Opportunity Act (AGOA) with the United States. These agreements provide duty-free access to large markets, presenting an opportunity for local manufacturers to scale up production for export. Additionally, neighboring countries such as South Africa, Zambia, and Mozambique offer growing demand for Zimbabwean textiles and apparel.</p>	<p>Sustainable & Organic Textiles</p> <p>The global fashion industry is shifting towards sustainability, with increasing demand for eco-friendly and organic textiles. Zimbabwe can capitalize on this trend by promoting sustainable cotton farming practices and ethical textile production. Initiatives such as organic cotton certification and environmentally friendly dyeing processes can attract premium buyers, particularly in Europe and North America. This shift not only enhances Zimbabwe's competitive advantage but also aligns with the growing movement towards ethical fashion.</p>
<p>Investment in Modern Technology</p> <p>Many textile and garment factories in Zimbabwe operate with outdated machinery, affecting productivity and product quality. Investing in modern textile manufacturing technologies such as automated looms, digital printing, and advanced garment assembly can significantly improve efficiency, reduce costs, and enhance product competitiveness. This technological upgrade will also help local manufacturers meet international quality standards, making Zimbabwean textiles more attractive in export markets.</p>	<p>Supportive Policies & Incentives</p> <p>The Zimbabwean government has introduced various initiatives to revive the textile industry, including duty exemptions on imported textile machinery, tax incentives for manufacturers, and local content policies that encourage the use of locally produced fabrics. Access to affordable financing and public-private partnerships can further stimulate growth by helping businesses invest in equipment, expand operations, and explore new markets. The creation of industrial parks and export processing zones dedicated to textiles can also boost sector development.</p>	<p>Rising Demand for Locally Made Apparel</p> <p>There is a growing appreciation for locally made fashion, workwear, and traditional attire in Zimbabwe and across Africa. Consumer trends indicate increasing demand for African print designs, cultural clothing, and ethically made apparel, creating opportunities for local brands to thrive. Strengthening domestic manufacturing capacity can reduce dependency on imports while fostering homegrown fashion labels that cater to both local and export markets.</p>

Market Trends

Zimbabwe's clothing and textile exports have been dominated by men's and boys' suits and shirts, which have consistently been the most exported products in the sector. Between 2019 and 2023, the key export destinations were South Africa and Germany, accounting for over 70% of total exports in this category. South Africa, as a major regional trade partner, provides a stable market, while Germany reflects Zimbabwe's growing penetration into the European textile market.

Looking ahead, there is significant potential for market diversification, with opportunities emerging in the United Arab Emirates (UAE), Spain, and the Netherlands. These markets have a growing demand for quality apparel, Zimbabwe can tap into by strengthening trade linkages, improving product branding, and aligning with international quality standards. Expanding into these regions could reduce reliance on current buyers and enhance the resilience of Zimbabwe's clothing and textile exports.

Processed Foods



The processed foods sector in Zimbabwe presents significant investment and trade opportunities, driven by increasing urbanization, a growing middle class, and rising consumer demand for convenience foods. With a diverse agricultural base providing raw materials and an evolving retail landscape, the sector is poised for expansion.

Market Potential

Zimbabwe’s food processing industry benefits from a well-established agricultural sector producing key inputs such as maize, wheat, dairy, fruits, and vegetables. The demand for processed foods, including packaged snacks, dairy products, baked goods, and canned foods, is growing as consumers seek convenient and affordable options. The government has also implemented policies to promote local production and reduce import dependency, creating a favourable environment for investment.

Key Opportunities

Investment in Food Processing Facilities

Modernizing processing plants to enhance efficiency and quality standards.

Value Addition in Agricultural Products

Developing high-value processed goods such as fruit juices, frozen vegetables, and dairy products.

Export Potential

Expanding regional exports to markets within the Southern African Development Community (SADC) and beyond.

Retail and Distribution Growth

Leveraging the expansion of supermarkets and online food retail platforms.

Technology and Innovation

Implementing automation, food safety, and sustainable packaging solutions.

[infographic]

Recent export figures indicate that Zimbabwe’s food and beverage sector contributes over \$300 million annually in exports, with key trade partners including South Africa, Zambia, Mozambique, and Botswana. Growth in export figures is driven by increased investment in value addition and improved production capacities.

Regulatory Environment

Zimbabwe has a regulatory framework that supports local manufacturing and trade, including incentives such as tax benefits for food processors. The Standards Association of Zimbabwe (SAZ) ensures food safety compliance, making it essential for investors to adhere to local and international quality standards. The processed foods sector in Zimbabwe is a dynamic and evolving industry with vast potential for growth. Investors and traders can capitalize on a favorable policy environment, abundant raw materials, and increasing consumer demand to establish a strong presence in the market.

Paper & Packaging



Zimbabwe’s packaging and paper sector plays a pivotal role in supporting key industries such as manufacturing, mining, and agriculture. The sector has experienced a significant rebound, contributing to the nation’s economic development.

The Zimbabwean packaging sector encompasses various materials, including paper, plastic, metal, glass, textile, and wood. Each material offers distinct advantages and is selected based on the specific product requirements being packaged. Paper and plastic packaging are favoured for recyclability and use of renewable resources. In general, the sector globally is advocating for innovative production methods with the aim of reducing the environmental impact and carbon footprint.

Investment and Trade Opportunities

The resurgence of Zimbabwe’s packaging industry presents several trade and investment opportunities:

Investment in Sustainable Packaging With a global shift towards eco-friendly solutions, there is a growing demand for sustainable packaging materials. Investing in recyclable and biodegradable packaging can cater to both local and international markets.	Technological Advancements Adopting modern packaging technologies can enhance efficiency and product quality, making Zimbabwean products more competitive globally.	Export Potential The packaging sector's growth supports the export of packaged goods, especially in agriculture and manufacturing, by ensuring products meet international packaging standards.	Import Substitution Developing local packaging solutions can reduce reliance on imports, fostering self-sufficiency and creating local employment opportunities.
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For businesses looking to explore these opportunities, platforms like ZimTrade and ZIDA offer valuable resources and support for engaging in Zimbabwe’s trade and investment landscape. In summary, Zimbabwe’s packaging and paper sector is on an upward trajectory, with ample opportunities for collaborative investments, innovation, and trade, contributing significantly

Market Trends and Data

The Zimbabwean packaging sector is categorized by product types such as metal packaging, paper packaging, textile packaging, plastic packaging, glass packaging and wood packaging. Players in the sector include Hunyani Paper and Packaging, Saltrama Plastics, Natpak, and other emerging companies focusing on paper and plastic recycling. Each segment’s performance varies, reflecting diverse applications across industries.

Over the five-year period, 2019 to 2023, the sector experienced a negative trade balance which indicates investment opportunities to reduce the deficit. The export destination countries for Zimbabwe are mainly within the region such as Mozambique, Zambia, and South Africa. In order to compliment the country’s needs, Zimbabwe mainly imports from countries such as China, South Africa, Zambia and Botswana.

Leather & Footwear



Zimbabwe's leather and footwear sector is a cornerstone of the country's manufacturing industry, combining a rich heritage of artisanal craftsmanship with modern innovation. With access to abundant, high-quality raw materials and a skilled workforce, Zimbabwe is uniquely positioned to produce premium leather goods that cater to the global market. The sector is committed to sustainable and ethical production practices, aligning with international trends toward eco-friendly manufacturing.

The leather value chain in Zimbabwe spans from raw hides and skins to finished products, including footwear, bags, belts, and accessories. By participating in the Osaka 2025 World Expo, Zimbabwe aims to showcase its capabilities, attract international investment, and expand its presence in key global markets, particularly in Asia.

Investment and Trade Opportunities

The resurgence of Zimbabwe's packaging industry presents several trade and investment opportunities:

High-Quality Craftsmanship Zimbabwean artisans produce high-quality leather products, including shoes, bags, belts, and upholstery. Many small-scale manufacturers offer custom-made items at competitive prices, making it a great place for unique and handcrafted leather goods.	Availability of Raw Materials Zimbabwe has a large cattle population, particularly in regions like Matabeleland, which provides a steady supply of hides and skins for leather production. This makes it easier and more cost-effective to source raw materials locally. Zimbabwe's large livestock population provides a steady supply of high-quality hides and skins, with annual production of approximately 2.5 million hides and 3.5 million skins.	Market Access Zimbabwean leather products have access to regional and international markets, such as the COMESA, SADC, African Continental Free Trade Area (AfCFTA) and the EU market under preferential trade agreements. This presents an opportunity for bulk buyers and businesses looking to resell Zimbabwean leather products abroad.	Investment Opportunities For entrepreneurs, there are opportunities to invest in Zimbabwe local leather processing plants, retail businesses, and export-focused ventures. The government of Zimbabwe is encouraging foreign and local investment in the sector to boost employment and production capacity.
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Global imports of leather and leather products amount to US\$248 billion in 2023. Major importers include United States of America US\$40.5 billion, Germany US\$17.2 billion, France US\$15 billion and Italy US\$13.1 billion.

Consumers are becoming more eco-conscious, leading to a demand for environmentally friendly leather. Zimbabwean producers are adapting by incorporating vegetable tanning and chrome-free tanning methods which are gaining popularity over chemical-heavy processes. Ethical sourcing and traceability of raw materials are becoming key factors in purchasing decisions.

Zimbabwe's leather and footwear sector presents a compelling opportunity for sourcing high-quality leather products and raw materials. With a rich heritage of craftsmanship, an abundant supply of hides and skins, and a growing commitment to sustainable production, the country is well-positioned to meet global demand. The sector benefits from preferential market access through trade agreements with COMESA, SADC, AfCFTA, and the EU, providing a strategic advantage for international buyers.

Investment opportunities abound, from leather processing plants to retail and export ventures, supported by a government keen to boost local production and employment. Zimbabwe's increasing adoption of eco-friendly tanning methods aligns with global trends toward ethical and sustainable manufacturing, further enhancing its appeal. By leveraging its skilled workforce, raw material availability, and expanding market reach, Zimbabwe is set to establish itself as a competitive player in the global leather industry. As the country showcases its potential at the Osaka 2025 World Expo, businesses and investors have a unique chance to engage with this promising market and contribute to its growth.

Market Trends and Data

Zimbabwe's leather exports generated \$35.5 million in 2024 up from US\$22.4 million in 2017 translating to 61% increase, with footwear and leather goods contributing significantly. Major export markets for Zimbabwe include South Africa US\$27.6 million, Singapore US\$1.9 million and Ukraine US\$1.6 million.



ZIMBABWE
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ZIMBABWE'S TRADE OPPORTUNITIES

EXPO 2025, OSAKA

Household & Electricals



The household appliances market covers appliances that are usually used in private households to perform various tasks such as cleaning, washing, cooking and refrigeration. The market is competitive and features various prominent local manufacturers such as Capri, AE Electrical and Treger Products. Other international brands taking up shelf space include Defy and Samsung, among others.

Zimbabwe's Household Goods & Electricals sector is a dynamic and evolving industry, contributing significantly to the country's manufacturing and trade landscape. The sector encompasses a broad range of products, including home appliances, consumer electronics, lighting solutions and durable household goods.

Key players in the sector range from established manufacturers to emerging small and medium enterprises (SMEs), driven by a combination of local demand and export opportunities. The industry benefits from Zimbabwe's growing middle class, increasing urbanisation and government initiatives aimed at boosting local production and reducing reliance on imports.

Opportunities & Growth Potential

The market encompasses a wide range of products, including:

- Major Appliances: Refrigerators and stoves.
- Small Appliances: Kettles, toasters and other kitchen gadgets.
- Consumer Electronics: Televisions, audio systems and home theatre equipment.
- Furniture: Sofas, beds, dining tables and other household furniture.
- Home Decor: Lighting, rugs, curtains, and other decorative items

Zimbabwe presents various competitive advantages that make it an attractive destination for investment and trade in household goods and electricals:

- Abundant Natural Resources: The country has rich deposits of key raw materials such as lithium, copper and nickel, essential to produce electrical goods and batteries.
- Growing Manufacturing Base: Government incentives under the National Development Strategy (NDS1) promote local value addition and industrialisation, reducing import dependency.
- Strategic Location: Zimbabwe's central position in Southern Africa provides easy access to regional markets, including the Southern African Development Community (SADC) with over 300 million consumers.
- Renewable Energy Potential: Increasing investments in solar and hydroelectric power provide opportunities for energy-efficient household goods and electrical products.
- Technological Advancements: The rise of digital transformation and smart technologies is opening new avenues for product innovation and competitiveness.

Market Trends and Data

Zimbabwean Market Trends:

- Rising Consumer Demand: Increased disposable income and urbanisation are driving demand for modern home appliances and smart electrical goods.
- Government Incentives: Tax rebates and financial support for local manufacturers enhance domestic production.
- Growth in E-Commerce: Online retailing is expanding, allowing greater market penetration for household goods and electronics.
- Energy-Efficient Products: A shift towards eco-friendly and energy-saving appliances is gaining momentum.

Global Market Trends:

- Sustainable & Green Technologies: Eco-friendly appliances and smart home innovations are shaping global market trends.
- Increasing Smart Home Integration: AI and IoT-powered devices are revolutionizing consumer preferences.
- Supply Chain Diversification: Businesses are exploring new manufacturing hubs, presenting Zimbabwe with an opportunity to attract foreign investment.
- Expanding African Consumer Market: The African Continental Free Trade Area (AfCFTA) enhances export opportunities for Zimbabwean goods.

Building & Construction



Zimbabwe's building and construction sector is a key driver of economic growth, supporting infrastructure development, industrial expansion, and urbanization. Major modernisation projects, including road rehabilitation and commercial developments, highlight its growth potential. The country is among the fastest-growing economies in Southern Africa, with economic growth rates of 6.1% in 2022 and 5.3% in 2023, by strong performance in agriculture, mining, and manufacturing. This momentum has spurred rapid expansion in construction, encompassing residential, commercial, and industrial projects, as well as major public infrastructure developments such as roads, bridges, dams, and water systems. The sector's contribution to GDP rose to 6,8% in 2023, up from 3,3% in 2021, reinforcing its role in Zimbabwe's vision of becoming an Upper Middle-Income Economy by 2030.

Strategically positioned as a gateway to the SADC and COMESA regions, Zimbabwe offers access to a market of over 600 million people. Competitive local sourcing of materials, government incentives, and a skilled workforce further enhance the sector's appeal. Employment in the construction industry has surged by 70% over the past five years, from an average of 10,000 workers to approximately 17,000 in 2023, with government-led infrastructure rehabilitation playing a significant role in this growth.

Zimbabwe's construction sector exports high-quality products such as cement, granite, tiles, bricks, steel, and aluminium products to neighbouring markets. Locally manufactured doors, roofing sheets, and prefabricated structures are increasingly sought after

in the region, offering cost-effective solutions for large-scale developments. The sector also exports specialized construction services, including architectural design, engineering consultancy, and project management, positioning Zimbabwe as a competitive supplier in both regional and international markets.

The industry is increasingly adopting modern construction technologies, including smart building solutions and energy-efficient designs, while also embracing sustainability using eco-friendly materials. Compared to regional counterparts, Zimbabwe's construction sector exhibits a robust growth trajectory, with its expanding export capacity strengthening trade partnerships across Africa and beyond.

Exports in the Building and Construction Sector

Cement

The nation possesses substantial limestone deposits, a critical component in cement production leading to a thriving cement industry, with major producers such as PPC Zimbabwe and Lafarge Cement Zimbabwe. In 2023, exports of commodities under the category "Salt; sulfur; earths and stone; plastering materials, lime and cement" reached approximately \$922 million, about 12.7% of the country's total exports.

Steel

Zimbabwe's iron ore reserves have facilitated the development of a domestic steel industry capable of producing high-grade steel products. In 2023, the country exported iron and steel worth approximately \$390 million, underscoring its role as a key supplier in the regional market.

Granite

The country boasts extensive granite formations, particularly in regions such as Mutoko, Murehwa, and Mount Darwin. These areas are renowned for producing high-quality black granite, a material highly sought after in both local and international markets for its durability and aesthetic appeal. Companies operating within this sector supply various types of granite aggregates for construction and road works.

Limestone

Beyond its use in cement production, Zimbabwe's high-purity limestone is sought after in various industrial applications, including steel manufacturing and chemical production. The country's limestone resources enhance its export portfolio, supplying regional markets in Africa and beyond.

Windows and Door Frames

Zimbabwe’s construction sector exports high-quality steel window and door frames, widely used in residential, commercial, and industrial projects across the region in markets such as Zambia, Mozambique, Malawi, and Botswana. In addition to steel products, Zimbabwe exports wooden window and door frames made from high-quality, sustainably sourced hardwoods such as teak and mahogany

Roofing Tiles and Bricks

The country produces a variety of bricks, including clay bricks, cement bricks, and concrete blocks, which are widely used for residential, commercial, and industrial construction. Zimbabwean clay bricks are particularly valued for their strength, thermal efficiency, and aesthetic appeal, making them a preferred choice for durable and environmentally sustainable structures. Zimbabwe is also a leading exporter of ceramic and concrete roofing tiles.

High Density Polyethylene (HDPE)

Zimbabwean manufacturers produce HDPE pipes in various diameters and specifications, meeting international quality standards and ensuring compatibility with diverse infrastructure projects. In addition to pipes, Zimbabwe exports HDPE sheets and fittings, including tank linings, geomembranes for waterproofing, and structural reinforcements.

Competitive Advantages of Zimbabwe’s Building and Construction Sector

Skilled Workforce

Zimbabwe produces top-tier engineers, architects, and tradespeople through institutions like UZ, NUST, and HIT. The Zimbabwe Institution of Engineers (ZIE) upholds high professional standards, with local experts contributing to major projects across SADC and beyond.

Strong Skills Development Support

Government and industry-led programs, such as NAMACO, ZCIA, and apprenticeship training, align education with market needs. Collaboration with global partners ensures the adoption of advanced construction technologies and sustainable building practices.

[pic of actual contruction project in zimbabwe]

Engineering Sector



Zimbabwe’s engineering sector is a key driver of industrial growth and export diversification, supplying high-quality machinery, construction equipment, and iron and steel products to regional and international markets.

The iron and steel industry plays a pivotal role in Zimbabwe’s export portfolio, supplying high-quality steel sheets, reinforcing bars, pipes, and structural components to markets across Southern Africa. With increased production capacity and compliance with international quality standards, Zimbabwean steel manufacturers are gaining a competitive edge. The country is also a key exporter of fabricated metal products, including steel doors, roofing sheets, fencing materials, and structural frameworks, which are widely used in construction projects throughout the region.

The machinery and equipment segment is a major contributor to Zimbabwe’s exports, with local manufacturers producing industrial machines for agriculture, mining, and infrastructure development. These products are highly sought after in Mozambique, Zambia, Botswana, and the Democratic Republic of Congo (DRC), where demand for reliable, cost-effective industrial equipment continues to grow. Zimbabwe’s exports of construction equipment, including earthmovers, road graders, and bitumen sprayers, are also on the rise, supporting large-scale infrastructure projects across the region.

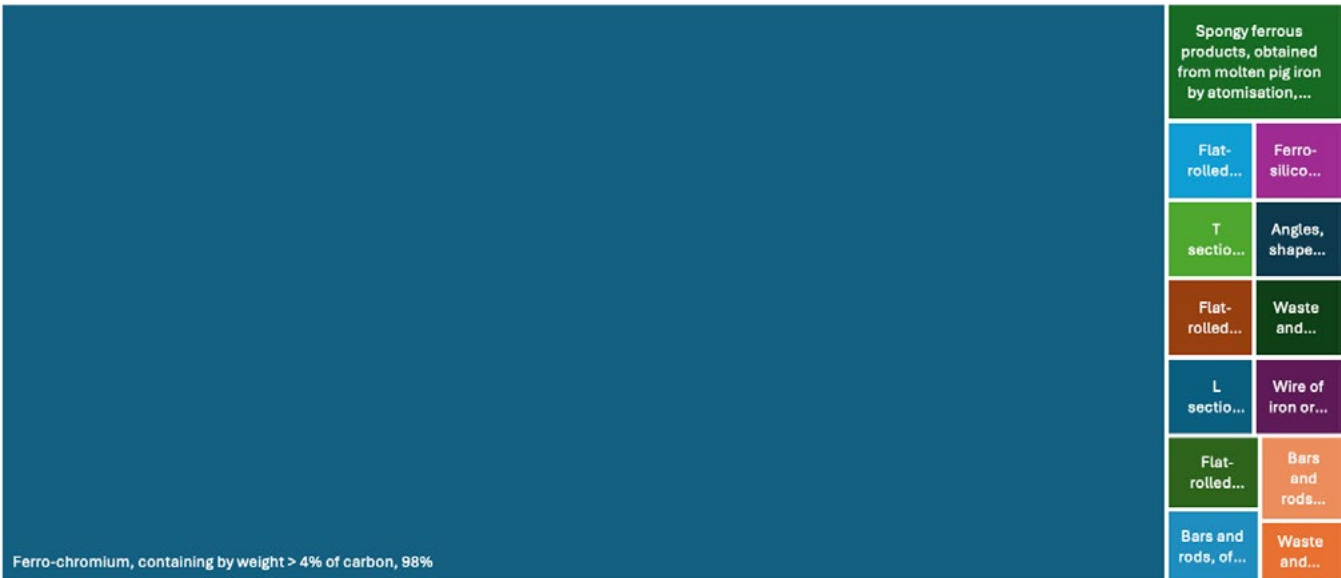
Aligning with global sustainability trends, Zimbabwean engineering firms are adopting eco-friendly production methods, energy-efficient technologies, and sustainable raw material sourcing, making their exports more attractive to environmentally conscious buyers. As demand for high-quality, competitively priced engineering products continues to grow, Zimbabwe is well-positioned to strengthen its presence in regional and global markets.

Zimbabwe’s exports in the sector fluctuated from 2014 to 2023 due to external and internal challenges. While initial growth was driven by strong global demand, it was later hindered by economic difficulties, and the COVID-19 pandemic. However, recovery was realised especially between 2017-2018 and again from 2021 to 2023. By 2023, exports reached US\$390 million a 27% increase from 2019. This growth highlights the resilience of Zimbabwe’s export sector, with key markets including South Africa, Mozambique, Zambia, Malawi, and Botswana, reflecting both recovery and diversification in regional trade.

Zimbabwe’s Key Export Markets

China is Zimbabwe’s top export market for iron and steel exports, accounting for the largest share of exports, however, Zimbabwe’s export portfolio is quite diverse in this sector, with both European (Netherlands, Italy, Belgium) and Asian (Hong Kong, China, Indonesia) markets making up significant portions of the total. Zimbabwe is actively focusing on boosting trade with markets such as Zambia and Malawi, leveraging targeted export promotions and strategic initiatives to enhance economic ties and open new opportunities for growth.

Zimbabwe’s Iron and Steel Exports

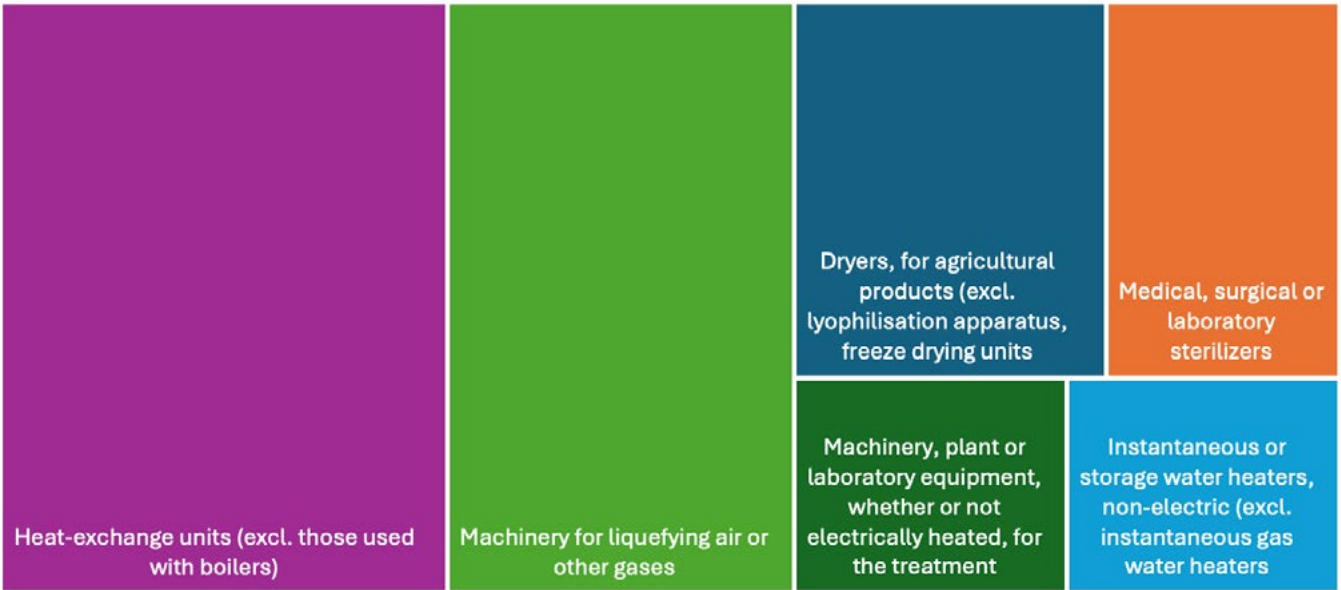


Source: TradeMap 2025

Zimbabwe’s steel and iron exports are driven by high-carbon ferrochrome, which accounts for 98% of total shipments, reinforcing the country’s position as a key supplier to global stainless steel producers. The remaining 2% includes spongy ferrous materials, flat-rolled goods, angles, T-sections, scrap, wire, bars, and rods, catering to diverse market needs. With a strong ferrochrome supply and a growing range of steel products, Zimbabwe offers reliable trade opportunities for buyers seeking quality raw materials and semi-processed goods.

Machinery/Equipment Exports 2023

Zimbabwe’s top ten machinery exports are primarily exported within the Southern African region, with South Africa accounting for 40% and Zambia following closely at 32%, reflecting strong regional trade ties and demand, particularly in mining and industrial sectors. Mozambique accounts for 10% of exports, driven by infrastructure development in that market, while Germany (8%), highlights Zimbabwe’s engagement with international markets for specialised machinery exports. Smaller importers include Botswana (2%) and Sudan (1%), while Congo, the United Arab Emirates, and Malawi register minimal imports. This underscores Zimbabwe’s strategic role in regional trade while presenting opportunities for expansion into new markets, particularly in Europe and beyond, a challenge that the country is ready to accept and rise to.



Source: TradeMap 2025

Zimbabwe’s machinery exports cover a wide range of industries, showing the country’s ability to supply essential equipment. The biggest export is heat-exchange units, which are used for temperature control in industry. Machinery for liquefying air or gases is another key product, supporting sectors like refrigeration and industrial gas production. Agricultural dryers make up a significant share, highlighting Zimbabwe’s role in providing equipment for food processing and farming. Other important exports include medical and laboratory sterilizers, which serve the healthcare sector, and non-electric water heaters, which are in high demand in areas without reliable electricity.

Key players of the engineering sector in Zimbabwe

The engineering sector is driven by several key companies making great progress in different industries. These companies are crucial in developing the country’s infrastructure and growing its industries. They work in areas like electrical and mechanical engineering, construction, and road building. Their innovative methods and strong commitment to quality have made them leaders in the sector both nationally and regionally.

Services



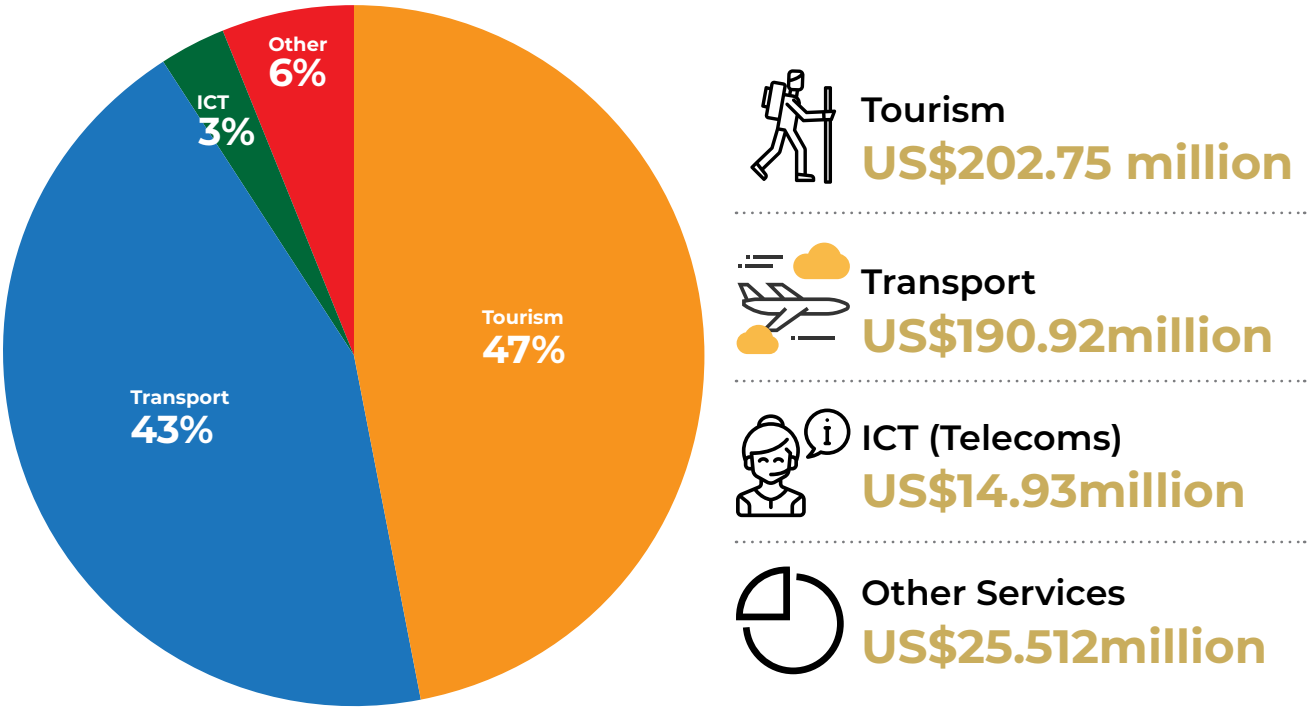
Between 2013 and 2024, Zimbabwe’s services sector played a pivotal role in the nation’s economic landscape, contributing significantly to the Gross Domestic Product (GDP) and showcasing resilience amidst various challenges. Services have contributed positively to the GDP, contributing 41.55% to GDP in 2022 and 62.41% in 2023. (Source World Bank)

The services sector is made up of tourism, transport, telecoms and other services. The performance of the sector shows that US\$434.112 million was recorded for 2024, compared to US\$379.41 million recorded in 2023, US\$434.01 million in 2022 and US\$198.25 million in 2021. Accordingly, Services recorded a 14% year on year increase in 2024 when compared with 2023, which is attributed to an improved contribution by the other services category which recorded a remarkably 343%

increase to US\$25.512 million in 2024 from US\$5.76 million recorded in 2023.

Notably, 2024 amount of US\$434.112 million breached the 2022 figure of the country’s best export performing year. The performance of the services sector calls for concerted efforts to ensure this sector grows into a billion-dollar sector.

Top Performing Sub-sectors (2024)





ZIMBABWE
BEYOND THE LIMIT
EXPO 2025 OSAKA, KANSAI, JAPAN

ZIMBABWE'S TRADE OPPORTUNITIES
EXPO 2025, OSAKA

Information & Communication Technology



Zimbabwe’s Information and Communication Technology (ICT) sector has experienced significant developments since 2021, marked by policy reforms, infrastructure expansion, and efforts to bridge the digital divide.

The sector has been performing positively over the past five years with growth from US \$ 3.38 million in 2021 to US \$ 14.93 Million in 2024, 341.716% increase in exports. The growth of the sector can be attributed to the Policy initiatives that have been implemented by the government of Zimbabwe. These include

1. National ICT Policy 2022-2027

In March 2022, Zimbabwe introduced the National ICT Policy 2022-2027, aiming to leverage ICTs for socioeconomic development in alignment with Vision 2030. The policy emphasizes infrastructure development, digital skills enhancement, and the adoption of emerging technologies.

2. Launch of ICT Policies in 2024

In March 2024, Zimbabwe unveiled three pivotal ICT policies: the revised National ICT Policy, the Smart Zimbabwe 2030 Master Plan, and the National Broadband Plan. These initiatives are designed to foster a conducive environment for digital economic growth and ensure widespread access to affordable digital technologies.

Opportunities and Growth Potential

Emerging Markets Expansion

- Rapid urbanization and a growing middle class.
- The Government is investing in infrastructure, creating demand for consulting and professional services. (Government E Services)

AI-Driven Service Innovation

- AI-powered customer service, chatbots, and predictive analytics enhance business efficiency.
- Automation is creating new service-based industries, from AI-driven healthcare diagnostics to smart financial advisory.

Cybersecurity and Data Protection Services

- Increased digital reliance has heightened the demand for cybersecurity and compliance services.
- Businesses require expertise in data privacy laws such as GDPR and CCPA.

Hybrid Work and Virtual Collaboration Tools

- Remote work solutions, virtual events, and online collaboration tools will continue growing.
- Demand for co-working spaces and hybrid work models is expected to remain strong.

Sustainable and ESG-Compliant Services

- Green consulting, carbon credit services, and sustainable tourism will expand as companies adopt net-zero strategies.
- Consumer preferences for ethical brands create opportunities for responsible business services.

Market Trends and Data

The period from 2021 to 2025 has been characterized by concerted efforts to enhance internet penetration and mobile connectivity. The National Development Strategy 1 (NDS1) set an ambitious target to increase internet penetration from 59.1% in 2020 to 75.42% by 2025.s of recent reports, internet penetration has reached 73.3%, with a mobile penetration rate of 97.5%. (Source Potraz annual Report 2024)

The ICT sector is witnessing increased competition with the entry of new players and technologies. notably, satellite-based internet services, such as those offered by Starlink, are anticipated to enhance connectivity, especially in remote areas where traditional infrastructure is lacking. Additionally, the government’s emphasis on fostering local innovation and supporting ICT start-ups is expected to diversify the competitive landscape further.