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Programme



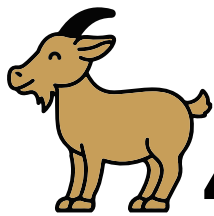
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TECHNICAL PAPER

# GOAT DIRECT MEAT MARKETING (DMM), A CASE OF ZAGP VALUE PROJECT



Promoting Zimbabwe's Goat and Pork Value Chains



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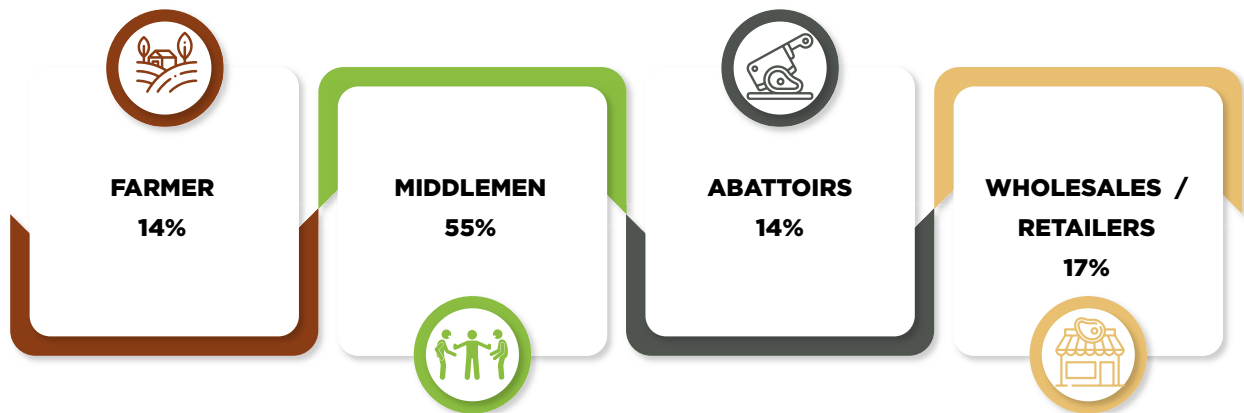
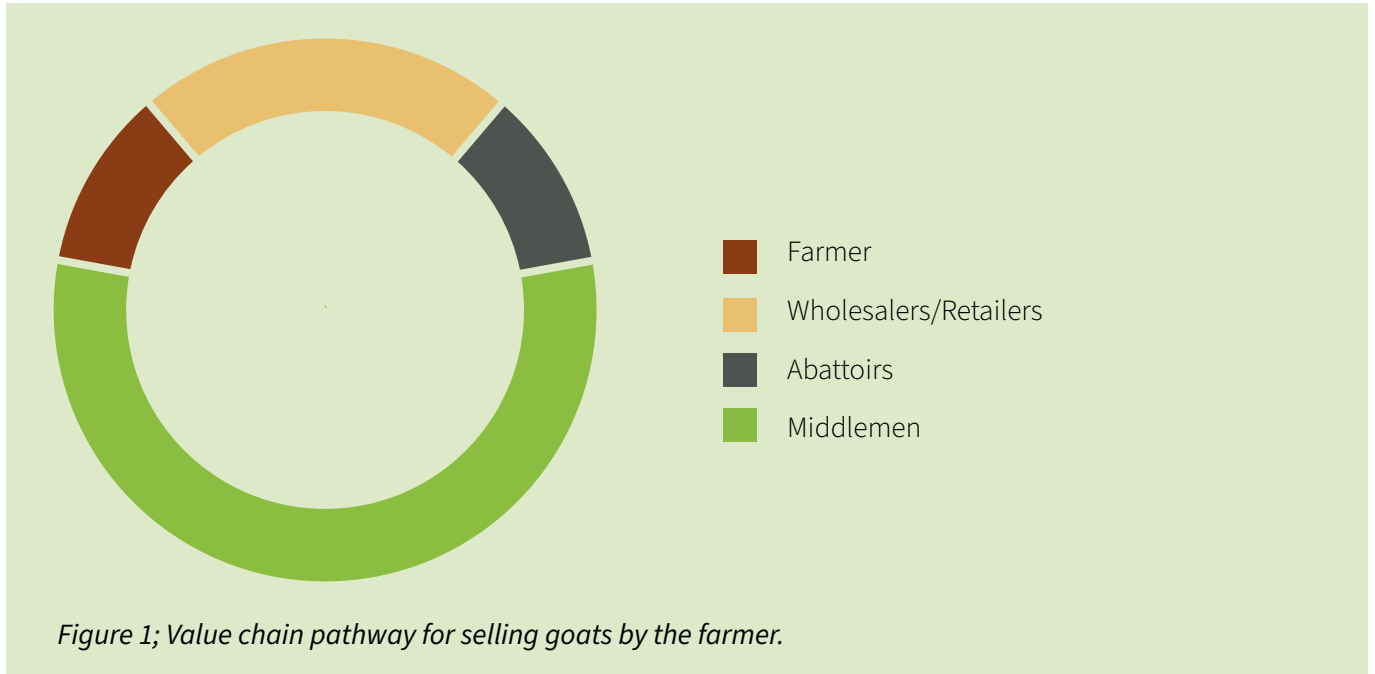
## INTRODUCTION

The Direct Meat Marketing (DMM) is a model initiated by European Union supported Zimbabwe Agricultural Growth Programme (ZAGP), Value Chain Alliance for Livestock Upgrading and Empowerment (VALUE) project. The VALUE Project is a brainchild of project partners namely Action Aid Zimbabwe (Lead), Mercy Corps (MC), COSV, Braford Farming, Zvikomborero Farms and Michview Enterprise. The DMM aim to directly link the farmer with licensed independent markets (butcheries and supermarkets) and consumers without any direct involvement of the middlemen. Though DMM model 64 consignments, a total 4 608 goats with a combined Cold Dressed Mass (CDM) of 57 991kg were sold to 42 licensed butcheries operating in Harare, Bulawayo and KweKwe by 1 234 farmers and sales revenue of US\$ 196 128.89 was generated by farmers.

This technical paper delves into the practice of direct meat marketing (DMM) by smallholder farmers in the goat industry. The objective of this study is to explore the various aspects of DMM, including its significance, challenges, and potential benefits for smallholder farmers. By examining the strategies employed by goat farmers to market their goat meat directly to consumers, the paper aims to shed light on the role of DMM in enhancing farmers' profitability, improving market access, and creating value-added opportunities. Furthermore, this research seeks to provide insights into the factors influencing the success and sustainability of DMM initiatives, such as product quality, branding, pricing, distribution channels, and consumer preferences. The findings of this study will contribute to a better understanding of DMM as a viable marketing approach for smallholder goat farmers and inform the development of targeted interventions and policies to support and promote this practice.

**Shared value distribution:** The project conducted a scoping study during the inception phase, the study highlighted that in every one dollar (USD1) realized in the goat market chain, when the farmer sell through

farm- gate price, the farmer gets 14%, abattoir 14%, wholesaler/retailers 17%, with the middlemen gets 55% as shown by Figure 1 and the pathway provided below.



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TECHNICAL PAPER GOAT DIRECT MEAT MARKETING (DMM), A CASE OF ZAGP VALUE PROJECT

## THE NEW GOAT VALUE CHAIN MARKETING PATHWAY CREATED BY DMM INITIATIVE.

The DMM created a new pathway of marketing goats that excluded marketing goats through the middlemen, who in ordinary marketing pathway benefited the most (55%). The new pathway included the following.

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graph LR
    Farmer[Farmer] --> GPBA[Goat producers Business Association (GPBA)]
    GPBA --> Transport[Transport]
    Transport --> Slaughter[Slaughter /abattoir]
    Slaughter --> Wholesales[Wholesales]
    Wholesales --> Retailors[Retailors/butcheries]
    Retailors --> Consumer[Consumer]
  
```

The new value chain marketing pathway involved the GPBAs collectively aggregating goats from farmers and transporting goats collectively to the slaughter/abattoir facility. At the abattoir the GPBA pays for the slaughter fees and proceeds to marketed goat meat directly to independently registered butcheries at wholesale price of US\$3.30 per kg in Mashonaland corridor and USD3.50 to USD4 per kg in Matabeleland. GPBA further supply retailers and butcheries at a specified agreed price per kg, using tricycle motors. In the new marketing pathway, the GPBAs facilitates logistical arrangements involved from aggregation to marketing of goats to wholesale and

retailors markets, which was never the case in the old marketing pathway.

## POSITIVE RESULTS OF DMM

Through DMM 64 goat consignments were conducted without the involve of middlemen. Below are the positive results recorded by each GPBA, which shows the new rebasing value chain profits after conducting DMM.

Region	Farmer	GPBA	Transporter	Abattoir	Whole/Retailer
RUSHINGA	57.1	4.3	0.7	3.7	34.2
MATOBO	51.3	4.3	6.6	8.7	34.0
MBIRE	53.1	2.2	6.3	4.2	34.2
BUHERA	54.6	3.1	4.4	4.5	34.3
NKAYI	49.9	4.3	4.2	7.5	34.2
MUDZI	52.2	4.1	5.4	4.0	34.2
LUPANE	43.0	7.7	7.4	7.5	34.2
BINGA	46.7	2.9	8.8	7.5	34.2
GWANDA	42.6	10.2	5.6	7.5	34.2
BEITBRIDGE	47.9	6.6	3.9	7.5	34.2

Figure 2: Share value distribution through DMM and introduction of GPBA

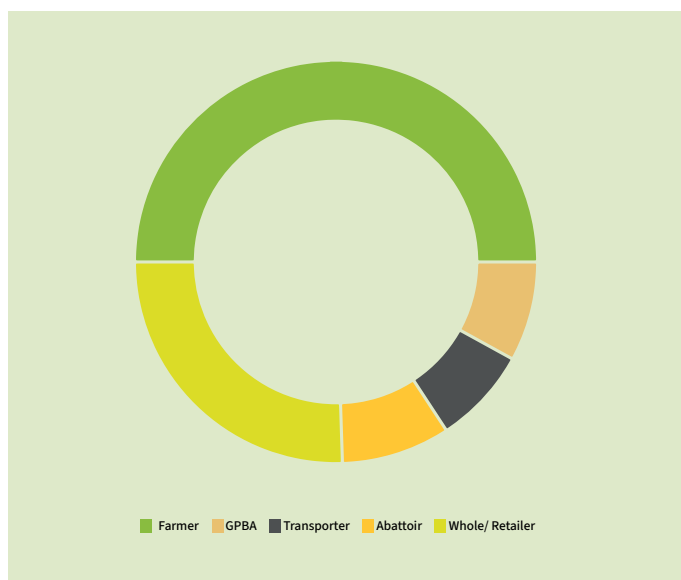


The above table shows that farmers, for example in Rushinga after marketing goats through DMM are now getting 57.1%, whilst GPBA is getting 4.3%, transporter 0.7%, abattoir 3.7% and whole and retailers 34.2%. Farmers are now making more profit (57.1%) than the

baseline figure of 14%. DMM has revolutionized goat marketing strategy. In other districts farmers are getting 51.35 in Matobo, Mbire 53.1%, Nkayi 49.9%, Mudzi 52.2% etc as shown in the table above.

## OVERALL REBASING VALUE CHAIN FROM ALL THE CONSIGNMENT

In conclusion DMM has proved to be a preferred marketing pathway for selling goats to formal markets at lucrative prices. The pie chart shows that overall share value now realized by value chain actors with farmers now getting 49.8%, GPBAs 5%, transporter 5.3%, abattoirs 5.7% whilst wholesalers and retailers are getting 34.2%.



## POLICY BOTTLENECKS AFFECTING DMM:

Table 1 shows the policy issues and how they are hindering collective goat marketing. It also highlights the associated recommendations to mitigate the identified bottlenecks.

Table 1: Policy bottleneck affecting direct meat marketing

POLICY ISSUE	BOTTLENECKS	RECOMMENDATIONS
Foot and Mouth Disease (FMD)	Animal movement restrictions are negatively affecting timely delivery of consignments	Resuscitation and enforcement of FMD boundary zones.
Transport Cost	High transport cost from the farm to the goat improvement centre (GIC), abattoirs and to butcheries	Improvement of road infrastructure to markets
High Slaughter Cost	Variability of slaughter costs across project corridors for example, slaughter costs in Matabeleland can be as high as US\$ 10.00 per goat while in Harare it is US\$ 2.50.	Need for regulation to reduce of slaughter costs

## POLICY RECOMMENDATIONS TO SUSTAIN DIRECT MEAT MARKETING BY SMALL HOLDER FARMERS IN ZIMBABWE

- Continuous capacity building of small holder farmer institutions: Provide comprehensive training programs and capacity-building initiatives targeting smallholder farmers and its associations, with a particular focus on women. Offer training on effective direct marketing strategies, including product branding, packaging, market research, customer engagement, and pricing strategies. Empowering small holder farmers with the necessary skills and knowledge will enhance their ability to engage in successful direct meat marketing practices.
  - Market access and linkages: Establish platforms and networks that facilitate market access for smallholder farmers engaged in direct marketing of goats is critical to sustain routine marketing of goats in Harare and Bulawayo markets. There is need to continue supporting farmer-led cooperatives or associations that can collectively negotiate with buyers, access higher-value markets, and establish long-term partnerships. Strengthen linkages between farmers and urban markets, hotels, restaurants, and other potential buyers to ensure a consistent and reliable market for their products.
  - Infrastructure development to easy marketing activities: There is need to invest in the development of infrastructure that supports direct marketing activities. Improve rural road networks to enhance transportation of goats to markets at cheaper prices. For example, transportation of goat is currently at average USD5 per goat in the Mashonaland region (to Harare) and USD6-10 per goat in Matabeleland region (to Bulawayo). Establish or upgrade livestock markets and slaughter facilities closer to smallholder farming communities. Adequate infrastructure will transaction cost reduce from transportation, slaughtering fees, time, accommodation and thus improve product quality, and facilitate efficient supply chains.
  - Financial support and access to credit: Provide financial support mechanisms, such as grants or low-interest loans, specifically targeted at smallholder farmers engaged in direct meat marketing. This should include support the establishment of revolving funds or community-based financing schemes that offer affordable credit to farmers, particularly women, to invest in production inputs, packaging, and marketing activities. This will help overcome financial barriers and enable farmers to expand their direct marketing initiatives and as well work on improving production and productivity in goat farming to supply quality goats.
  - Gender-inclusive policies and programs: Develop gender-sensitive policies and programs that specifically address the needs and challenges faced by women engaged in direct marketing of goats. Promote gender equity in access to resources, training, and market opportunities. Support women's participation in decision-making processes within farmer associations and cooperatives. By ensuring women's equal participation and representation, these policies will contribute to more inclusive and sustainable direct marketing practices.
- Implementing these policy recommendations will support smallholder goat farmers, particularly women, in Zimbabwe to effectively engage in direct marketing of goats. By addressing capacity gaps, improving market access, enhancing infrastructure, providing financial support, and promoting gender inclusivity, policymakers can create an enabling environment for smallholder farmers to benefit from direct marketing, improve their incomes, and contribute to the overall development of the goat industry.

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