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A Review of Import Substitution Industrialisation (ISI) Policy in Selected Industries in Zambia, 1964 – 1991

by

Chisulo Phiri

Yosefe Day Secondary School
Mambwe District, Zambia

Abstract
In 1964, Zambia's economy relied heavily on copper mining and imports from Southern Rhodesia (SR) with a negligible manufacturing sector. The United National Independence Party (UNIP) government sought to rectify this imbalance by implementing an import substitution industrialisation (ISI) policy to diversify the economy into manufacturing and agriculture. The Industrial Development Corporation (INDECO) was established in 1965 to support this diversification. Initially, ISI was led by the private sector, 1964-1970 and later by the government, 1971-1991. While many studies argue that manufacturing industries established during this period were dependent on imports and lacked foreign exchange, this article argues that significant strides were made in ISI across certain sectors of production. Some companies in the manufacturing sector adapted foreign technologies, fabricated spare parts for machinery and utilised locally sourced raw materials, thereby reducing their dependence on imports. The government managed foreign exchange judiciously, incentivised industries and devalued the currency to promote domestic production. Export promotion of non-traditional goods was encouraged to earn foreign exchange, leading to a shift by 1991 towards importing capital goods, necessary for expanding the consumer goods industrial base.

Key words: Import substitution industrialisation (ISI), raw materials, technology, spare parts, import dependent, foreign exchange, devaluation of kwacha and non-traditional exports.

Introduction

After gaining independence in 1964, the UNIP government's aim was to control the manufacturing sector and transform the economy. However, numerous constraints hindered this aspiration. First, the private sector's entrenched industrial strategy established during the colonial era, made a sudden shift impractical. Secondly, the country faced a shortage of trained personnel to set up and operate local industries. After recognising this challenge, the government sought external expertise to address the skilled manpower shortage. In 1965, the Ministry of Commerce and Industry (MCI) identified the lack of trained personnel as the main barrier to industrialisation.[1] The importance of training was also echoed by the United Nation's Senior Advisor on industrial development in a letter to the Zambian Minister of National Planning and Development in 1965.[2]

[1] NAZ, MF 1/2/22, Minutes of a working party to consider the form of delegation and the preparatory material for the Cairo symposium on industrial development in Africa, 04/06/1965.
[2] NAZ. MF1/2/168, Letter by I.Bavly to the Zambian Minister of National Planning and Development, 12/01/1965.

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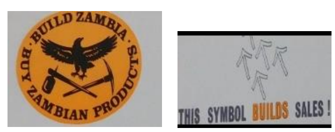
As a result of manpower shortage, the government allowed the private sector to lead ISI from 1964 to 1970. At the same time, the government selectively engaged in specific industries, while encouraging private enterprise elsewhere. The first White Paper released in October 1964, endorsed a private sector-driven industrial strategy following the recommendations from the Seer's report.[3] Despite having a favourable balance of trade in 1964, the government further recognised the lack of capital finance for local industrialisation.[4]

To encourage the private sector to set up local industries, incentives were introduced such as the Pioneer Industries Act of 1965, which offered tax benefits and the 'Buy Zambian Products Campaign' launched in 1967 featuring a symbol representing Zambian manufactured products. This symbol was required to be displayed on all Zambian manufactured or assembled products. Private investors could use this symbol at no cost, thereby encouraging them to promote their goods. At the national level, extensive advertising of the symbol through television and radio aimed to boost sales of Zambian products. Local district councils were instructed to prioritise the procurement of products which displayed this symbol when issuing tenders.[5] Figure 1 below shows the 'Buy Zambian Products symbol.'



Source: GRZ, INDECO, *A Survey of Zambian Industry* 1967 (Lusaka: INDECO Ltd, 1967), p.6.

Between 1971 and 1991, Zambia's industrial policy transitioned from private sector focus to government control, reflecting socialist principles. This shift began with President Kenneth Kaunda's Mulungushi Reforms in 1968, which mandated 51 percent local ownership in foreign companies. The 1969 Matero Economic Reforms further consolidated government influence, particularly in the mining sector through the Zambia Industrial and Mining Corporation (ZIMCO).[6] Several industrial Acts were enacted to support ISI goals, including the Industrial Development Act of 1977 (IDA), the Small-Scale Industries Development Organisation Act of 1981 (SIDO), the Village Industry Service Act of 1981 (VIS), the Export Development Act of 1985, the Zambia Bureau of Standards Act of 1982 and the Investment Act of 1986.

[3] GRZ, *The First White Paper*, (Lusaka: Government Printer, 1964), p.1 and *Economic Survey Mission on the Economic Development of Zambia: Report of the UN/ECA/FAO Mission* (Seer's *Report*), (Ndola: Falcon Press, 1964), chapter 3, p.21.
[4] Manenga Ndulo, "The structure of Zambia's External Trade, 1964-1970", paper presented to a workshop on the Zambian Economy, Lusaka, Zambia, from 27-29, April, 1984 and *Economic Survey Mission on the Economic Development of Zambia: Report of the UN/ECA/FAO*, chapter 3, p.21.
[5] GRZ, *INDECO A Survey of Zambian Industry* 1967, p.6.
[6] GRZ, *Zambia Industrial and Mining Limited Brochure*. (Lusaka: ZIMCO information and publicity unit, 1985), pp.5-8.

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Private Sector-Owned Industries Involved in ISI, 1964-1970

On 31 December, 1966 the government published a list of pioneer industries, encompassing footwear, wire, rope, fishing nets and twines, electrical batteries, radio, television, soap, chemical, cigarette and matches manufacturing. Private entities establishing these industries qualified for tax relief of two to five years.[7] In 1967 and 1968, several companies such as Battery Makers of Zambia Ltd (Kitwe), Nkwazi Manufacturing Company Ltd (Kafue), Lever Brothers Zambia Ltd (Ndola) and Solidaire Company Ltd (Ndola) received pioneer industries status.[8] These industries made significant progress in achieving ISI. The subsequent section discusses the activities of these companies in detail.

Battery Makers of Zambia Ltd

In 1968, the Zambian government granted Battery Makers of Zambia Ltd, based in Kitwe pioneer industries status in recognition of its achievement of using 75 percent local raw materials in the production of automotive batteries. At its Kitwe factory, the company manufactured lead parts, including top lead and plate grids using lead sourced from a mine in Kabwe.[9] Additionally, the company installed its own imported oxide mill, commissioned in 1965 which enabled it to process lead into lead oxide, thereby increasing the local content of its products. Sulfuric acid was the main imported material from South Africa by rail.[10]

The company also successfully manufactured accessory moulds and assembly tools locally which were previously imported. Furthermore, the company modified imported lead moulding pots to operate using electricity instead of handy gas, resulting in a significant increase in production to 3,500 units per month, meeting over 50 percent of the local market demand. After a K200, 000 expansion in 1967, the company's share capital increased to k120, 000 and the revamped factory was officially opened in July 1968 by the Minister of Commerce, Industry and Foreign trade, Honourable J. Chimba.[11] The company's achievements demonstrate the Zambian industrial sector's capability for technology modifications and challenges the belief that high capital was necessary for industrial set up.

[7] GRZ, *INDECO, Seventh Annual Report* 1966 (Lusaka: Associated Printers, 1966), p.1 and GRZ, *Outline of the Government's Industrial Policy*, (Lusaka: Government printer, 1966), p.4.
[8] The Zambian Review July, 1968, P.29.
[9] GRZ, *INDECO A Survey of Zambian Industry* 1967, p.27 and The Zambian Review July, 1968, p.29.
[10] Chisulo Phiri, "Constraints on industrialisation in colonial Zambia, 1890 – 1964", MA Dissertation University of Zambia (2021), p. 90.
[11] The Zambian Review July, 1968, p.17.

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Nkwazi Manufacturing Company Ltd

The company was established in Kafue in 1966. Initially, the company was owned 95 percent by William Kenyon Ltd and five percent by INDECO.[12] In 1987, INDECO acquired full ownership, making it a parastatal. The company originally focused on producing tennis balls, nylon fishing nets and twines using imported polypropylene. Over time, it adapted imported machinery to use local raw materials like cotton, creating polyethylene cords and manufacturing its own polypropylene. After nationalisation, Zambians occupied all positions, successfully transferring technology and skills to the local workers. The company met 65-70 percent of national demand of their products despite facing machine breakdowns. Machines were manufactured in 1935 and 1940 respectively. Modifications of machines led to new products like ropes made from local fibre of up to 40mm diameter, knot-less knots and mosquito nets.[13] The Zambian government implemented protective measures to support the company against imports of similar products.[14]

Solidaire Company Ltd

Solidaire Company Ltd, a private-owned enterprise located in Ndola successfully manufactured deep freezers, water and beverage coolers locally. Remarkably, 62 percent of components were made locally while 38 percent were imported. The company faced challenges in acquiring patents to produce copper tubing and compressors locally as a foreign company with the technology resisted sharing it. Recognised for its effort, the government granted pioneer industry status in 1967. The company produced a range of deep freezer and cooler sizes at competitive prices, making them a popular household item in Zambia. As a result, the government did not impose protective duties or import licences. The company offered a two-year warranty and featured the 'Buy Zambian products' symbol on its products.[15] The sizes or capacity of deep freezers ranged from 4.7 cubic feet (cu.ft), 8 cu.ft, 10 cu.ft, 12 cu.ft and 14 cu.ft. The prices were even lower than similar imported products.[16]

Chemical Industries Under Private Sector

The government granted pioneer industry status to Lever Brothers Zambia Ltd (Ndola) in 1967 after setting up a huge tower factory that produced locally the first washing powder sold under the brand name of Surf. The company utilised locally sourced essential oils to manufacture

[12]GRZ, *INDECO A Survey of Zambian Industry*, 1967, p.27; GRZ, *INDECO, Seventh Annual Report* 1966, p. 1; GRZ, *INDECO Annual Report and Accounts for the year ended 31 March* 1975. (Ndola: Monterey Printing and Packaging, 1975), p.27; The Zambian Review July, 1968, p.17 and GRZ, *INDECO Annual Report* 1976/1977. (Ndola: Monterey Printing and Publishing), p.25.
[13] INDECO Review Vol. 7 Issue No. 6, January-April 1990.
[14] INDECO Review Vol. 7 Issue No. 6, January-April 1990.
[15] The Zambian Review July, 1967, p.17 and INDECO Review Vol. 3 Issue No. 2, January-April 1987.
[16] The Zambian Review July, 1967, p.17.

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soap brands such as toilet soap, Sunlight, Persil and Lifebuoy.[17] In 1975, the company was nationalised and became Refined Oil Products Ltd (ROP), a wholly owned subsidiary of INDECO. After nationalisation, local employees struggled to acquire the skills necessary to manufacture strong and durable soap due to limited information shared by foreign experts.[18] For example, Mr. Chapa Yotam Chikamba argued that, 'when we nationalised Lever Brothers, you could tell the difference between the Lifebuoy soap made before nationalisation and the one after nationalisation. The latter finished within two or three days while the former took the whole week to finish when bathing.'[19]

In addition, the government urged four other foreign-owned chemical companies to replace imported talc with the locally sourced one in their production lines from Lusaka's Lilayi deposits. These companies manufactured various products which contained talc like pharmaceuticals, cosmetics, toiletries, wood preservatives and bitumen paint, but chose to import talc, claiming local quality was unsuitable. However, a Geological Survey of Zambia test revealed that Lilayi talc was of high quality, with 90 percent pure white talc and only 10 percent minor impurities of dolomite and chlorite.[20] In 1974, INDECO established a subsidiary, Crushed Stone Sales Ltd (CSS), which processed the Lilayi talc into lime flour grade one and two and was utilised in the local manufacturing of paints, animal feed and for manufacturing rubber compounds for tyres. [21] During the private sector-led period, 1964-1970, the manufacturing sector remained unbalanced with metal working industries experiencing an increase from 98 in 1965 to 171 in 1969.[22]

Government Led Import Substitution Industrialisation (ISI), 1971-1991

Government led ISI between 1971 and 1991 aimed to establish local industries for domestic goods production. INDECO focused on industries producing consumer and intermediate goods used as inputs in other production processes. Industries which produced consumer goods sold their products to wholesale and retail outlets where there was strict government price control mechanisms.[23] Firm government price controls were implemented in consumer goods, ensuring affordability for citizens. The analysis below will examine various industrial categories underlining successes in ISI and those that were still reliant on imports.

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[17] INDECO Review Vol. 3 Issue No. 2, January-April 1987.
[18] INDECO Review Vol. 3 Issue No. 2, January-April 1987.
[19] Interview with Chapa Yotam Chikamba, Director of National Food and Nutrition Commission, 1972-1985, 06/08/2023.
[20] INDECO Review Vol. 3 Issue No. 2, January-April 1987.
[21] INDECO Review Vol. 3 Issue No. 2, January-April 1987.
[22] GRZ, *Second National Development Plan*, 1972-1976, p.28.
[23] NAZ, ZIMCO 1/3/54, INDECO, Its present structural interdependence and re-organised future structure, 1973-1974.

Chemicals Division

The Chemicals Division included several companies, notably, Nitrogen Chemicals of Zambia Ltd (NCZ) established in 1967, ROP Ltd, Kapiri Glass Products Ltd (KGP), Kafironda Company Ltd, General Pharmaceuticals Ltd and Zambia Oxygen Company Ltd (Zamox). NCZ was owned by INDECO with 83 percent shares and Kobe Steel of Japan with 17 percent. Located in Kafue, the factory began production in 1970, manufacturing ammonium nitrate dense grade, ammonium nitrate explosive grade, ammonium sulphate and liquid ammonia. Over the years, NCZ expanded its product line to include nitric acid, carbon dioxide, methylated spirit and sulfuric acid. A coal-based process was selected for ammonia production, utilising locally sourced coal, compressed air and water as feedstock. Coal, as an intermediate product was also used to produce energy and it came from Maamba colliery Ltd, a subsidiary of INDECO and ensured that supply was reasonably affordable.[24] NCZ was established for two main purposes which were: to provide raw materials for the mining industry and provide fertilisers for the agricultural industry in the country.[25]

Significant advancements occurred within ISI at NCZ, particularly in the local mass production of chemicals that served as essential inputs for various industrial enterprises. For example, Kafironda Company Ltd utilised ammonium nitrate of explosive grade and nitric acid to make explosives. Additionally, Zamox Ltd set up in 1972, utilised carbon dioxide from NCZ and also used ammonium nitrate to manufacture nitrous oxide which began in 1981. As a result, Zambia achieved self-sufficiency in nitrous oxide production. Nitrous oxide was an anesthetic gas that was used in hospitals and was sold to Medical Stores of Zambia Ltd, with surplus quantities being exported. Zamox operated its compressor facilities at both its Lusaka and Ndola plants where the production of industrial and medical gases occurred.[26] These developments allowed the nation to replace imports for different types of gases, fertilisers and explosives production.[27]

At ROP, Glycerine derived from the edible oils was utilised in the production of nitroglycerine-based explosives at Kafironda Company. The use of local agricultural products-

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[24] GRZ, *INDECO, Eighth Annual Report* 1967. (Lusaka: Associated printers, 1967) p.25, GRZ, *Second National Development Plan*, 1972-1976. (Lusaka: Ministry of Development Planning and National Guidance, 1971), p.27; GRZ, *INDECO Annual Report and Accounts for the year ended 31 March* 1975, p.26; interview with Charles Chishimba, Staff Development Officer, 1983-2023, 06/08/2023 and T.McCartan, "The potential of the manufacturing sector of the Zambian Economy and Development Planning", paper presented at the Ministry of Planning and Finance 4 November 1974. In this paper he explained that ISI in Zambia was determined by the maximum use of local raw materials, value added and employment creation.

[25] Interview with Charles Chishimba, Staff Development Officer at NCZ, 1983-2023, 06/08/2023.

[26] GRZ, *INDECO Annual Report* 1982/83. (Ndola: Monterey Printing and Publishing, 1983), p.11.

[27] Interview with Charles Chishimba, Staff Development Officer at NCZ, 1983-2023, 06/08/2023.

including sunflower, soya beans and cotton seeds led to a significant rise in cooking oil production at ROP. Consequently, by 1989, ROP had managed to cut its reliance on imported crude oil to below 20 percent. Table 1 below illustrates the production figures for ammonium nitrate, along with profit and loss details from 1976-1989.

Table 1: Production of Ammonium Nitrate in Tonnes, Profits and Losses at NCZ, 1976-1989

Year	**1976/77**	**1978/79**	**1980/81**	**1982/83**	**1984/85**	**1986/87**	**1989/89**
Pre-tax profit/loss	K1.1m	1.450m	3.3m loss	K5m loss	2.2m	K2.0m	n.a
Ammonium Nitrate in Tonnes	46,000	48,800	50,400	47,200	50,000	43,000	40, 0000

Source: Compiled from INDECO Review Volume 7 Issue No. 6, January – April, 1990 and *INDECO Annual Report 1988/89*. (Ndola: Monterey printing and publishing), p.4.

Equally, General Pharmaceuticals Ltd relied on imported chemicals for the production of intravenous and oral rehydration fluids which were then sold to Medical Stores of Zambia Ltd.[28]

Established in 1973, KGP was a joint venture in which INDECO held 89 percent of the shares and West Germany's Coutinno Caro owned the remaining 11 percent. The aim of this collaboration was to enable Zambia achieve self-sufficiency in glass product manufacturing by utilising domestic raw materials. KGP'S range of products included hollow glass bottles, beer bottles, soft drink bottles, cooking oil bottles and medicine bottles. Over 80 percent of the necessary raw materials were sourced locally. Silica sand was obtained from a nearby quarry, Feldspar was found seven kilometres from this silica sand source, while coal was supplied by Maamba colliery and broken glass was also sourced locally as well. The main imports consisted of soda ash and machinery. A review report from INDECO in 1990, indicated that KGP did not need massive foreign exchange injections for these imports.[29]

By 1980 the company's production had increased by 32 percent to 8,435 tonnes from 6,337 tonnes the previous year. Sales also rose to 8,195 tonnes during the same period. Technological advancements played a crucial role in this growth as the company modified its coal-fired furnaces by adding locally manufactured electrical boosters.[30] This innovation enabled the company to add

[28] GRZ, *INDECO Annual Report*, 1983, p.11 and INDECO Review Vol. 7 Issue No. 6, January-April 1990.
[29] INDECO Review Volume 7 Issue No.6, January-April, 1990 and NAZ, ZIMCO, 1/2/4 Action plan and status report on Kapiri Glass Products.
[30] INDECO Review Volume 7 Issue No.6, January-April, 1990 and D.A. Simonda, "Zambia's National Development Strategies since Independence", Proceedings of the National Symposium on Science and Technology for

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new products of glass called beer mugs in 1980. Also, the production of hollow glass bottles increased from 13,000 to 20,000 tonnes per year after 1980.[31] The company's pre-tax profit rose to K2, 370 million in 1983 due to revised prices and further increased to k3, 045 million in 1986. By 1987, production had reached 93 percent of glass products and capacity utilisation had improved to 58 percent. Despite undergoing immense rehabilitation works between 1989 and 1990, KGP successfully exported 100,000 wine bottles to Malawi worth $42,000 USD. The Malawian firm that purchased these bottles was able to export its wine to West Germany, Burundi and Singapore.[32]

Industrial Holdings Division

The industrial holdings division included several companies: Kafue Textiles of Zambia Ltd (KTZ), Mulungushi Textiles Ltd, Kabwe Industrial Fabrics Ltd, Metal Fabricators of Zambia Ltd (ZAMEFA), Livingstone Motor Assemblers (LMA), Mansa Batteries Ltd, Luangwa Industries Ltd, Norgroup Plastics, National Drum and Can Ltd, Consolidated Tyre Services Ltd and Motor Parts Distributors Ltd. Within this division, KTZ, Mulungushi Textiles and ZAMEFA made substantial progress in achieving ISI objectives by utilising local copper and cotton to manufacture copper products and fabrics. KTZ was incorporated on 3 November 1966 in Kafue. INDECO held 50 percent of the shares while Amenital Holdings Trust owned 25 percent, Commonwealth Development held 15 percent and Barclays Overseas Development had 10 percent shares. The factory commenced production in 1970, boasting an annual capacity of 12.5 million metres of fabric. At its establishment, KTZ functioned as a fully integrated enterprise with essential sections for spinning, weaving, dyeing and finishing.[33] The goal behind the establishment of KTZ was to attain self-sufficiency in the production of clothing in Zambia. The main raw material for the company, cotton, was sourced from Lint Company Ltd, a subsidiary of INDECO.

In Kabwe, Mulungushi Textiles Ltd, also a subsidiary of INDECO began operations in 1983, utilising weaving machinery that had been imported from China.[34] In the same year, Lint Company Ltd bought 27 million kgs of cotton from local farmers, which resulted in an impressive yield of 9 million kgs of lint which surpassed local demands. Furthermore, KTZ bought 1.3 million kgs of lint

Development, organised by the National Council for Scientific Research, 23-24 February, 1978, Lusaka. In this paper, he identifies Zambezi Sawmills Ltd as one of the industrial companies where employees had to modify some of the plant machinery to make them operative to local conditions.

[31] GRZ, *Third National Development Pla*n, 1979-1983. (Lusaka: National Commission for Development Planning, 1979), p.245.

[32] INDECO Review Volume 7 Issue No.6, January-April, 1990.

[33] GRZ, *INDECO, Eighth Annual Report*, 1967; p.19 GRZ, *Register of Manufacturing Industry 1966* (Lusaka: MCI, 1966), p.14 and GRZ, *Second Development Plan* 1972-1976, p.27.

[34] UNIP 7/19/2, Zambia, 20 Years of Independence 1964-1984.

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while Mulungushi Textiles Ltd purchased 1.8 million kgs, leading to an excess that was exported to Britain, amounting to 1.3 million kgs in 1983. This achievement was a crucial step for Zambia in its journey to becoming self-sufficient in supplying raw materials for the textile sector, thereby eliminating the need for imported cotton.[35] However, the two textile companies imported caustic soda.[36] Table 2 below illustrates KTZ Ltd's production of fabrics and profits from 1979-1989.

Table 2 Production of Fabrics in Metres at KTZ and Pre-Tax Profit, 1979-89

Year	**1979/80**	**1980/81**	**1981/82**	**1983/84**	**1985/86**	**1987/88**	**1988/89**
Pre-tax profit	K3.275m	K4.708m	K5.423 m	K5.245m	K4.877m	K5.506m	K8.17m
Fabrics in metres	13,116, 000 million metres	14,689, 000 million metres	14,800, 000 million metres	14,950, 000 million metres	15,730, 000 million metres	16,550, 000 million metres	17,287, 000 million metres

Source: Compiled from INDECO Review Volume 7 Issue No. 6, January – April, 1990 and *INDECO Annual Report 1988/89*, p.41.

In contrast, LMA founded in 1972 relied completely on imported raw materials to assemble car models from Fiat, Peugeot and Isuzu. Attempts to produce spare parts locally for these vehicles were unsuccessful. The management team at INDECO explained that it was more cost-effective to import components for assembly than to buy the technology required for manufacturing.[37] Consequently, in 1974, INDECO was obliged to establish a subsidiary, Motor Parts Distributors Ltd, which focused on selling and distributing spare parts. Additionally, Consolidated Tyres Ltd which was established in 1970, achieved significant advancements in local tyre retreading. The company obtained old tyres from local sources and utilised talc from CSS Ltd for rubber compound moulding. Nevertheless, the company still imported new tyres and tubes for earth-moving equipment and marketed them locally. Similarly, Norgroup Plastics Ltd and Kabwe Industrial Fabrics and National Drum and Can Ltd depended on imported plastic and steel raw materials for their packaging products. Despite dependence on imports, they satisfied approximately 30 percent local demand of their products. Norgroup supplied packaging materials

[35] UNIP 7/19/2, Zambia, 20 Years of Independence 1964-1984.
[36] NAZ, ZIMCO 1/2/507, Quarterly Reports of Kafue Textiles as at 31/12/1988 and NAZ, ZIMCO 1/2/507, Minutes of the 96 th Meeting of the Board of Directors of the KTZ in INDECO House on Wednesday 9 December 1988.
[37] NAZ, ZIMCO 1/2/507, Quarterly Reports of Kafue Textiles as at 31/12/1988 and NAZ, ZIMCO 1/2/507, Minutes of the 96 th Meeting of the Board of Directors of the KTZ in INDECO House on Wednesday 9 December 1988.

to ROP and other sectors while Kabwe Industrial Fabrics supplied NCZ with fertiliser packaging bags.[38]

Established in 1971, ZAMEFA utilised locally sourced copper in its products. The company achieved remarkable success in ISI by broadening its product range from copper cables and rods to new initiatives, notably the magnet wire project and the copper brass and bronze billet casting project, both of which were completed and launched during the 1987/1988 period. The government praised the magnet wire project for its importance as an ISI initiative and contribution to foreign exchange earnings.[39] Another company, Mansa Batteries Ltd was established in 1978 and manufactured R20 dry cell batteries for radios and torches. The main raw materials utilised in the manufacturing process were manganese sourced from local mining along Mansa and Kawambwa road and zinc obtained from a mine in Kabwe. The excess manganese was exported to Tanzania, Malawi and Zimbabwe. However, assembly components for the batteries were imported.[40] Furthermore, similar to LMA, Luangwa Industries Ltd established in 1983 in Chipata depended on imported raw materials for assembly.[41]

Steel Build Holdings and Construction Division

This division included companies such as Chilanga Cement Company Ltd, CSS Ltd, Lusaka Engineering Company Ltd (LENCO), Monarch Zambia Ltd, Zambia Steel and Building Supplies Ltd (ZSBS), Ndola Lime Company Ltd, Zambia Clay Industries Ltd which operated its two subsidiaries, Nega-Nega and Kalulushi Brick Works. Notable achievements in ISI were made by Chilanga Cement Company Ltd, ZSBS, CSS Ltd and Ndola Lime Company Ltd. ZSBS Ltd manufactured various products including plywood, doors, block boards, parquet tiles, furniture, builders' ware, hand tools using local timber and sanitary ware.[42] LENCO and Monarch depended on imported steel for their products. In this division also, INDECO held two percent stake in Scaw-Tow Foundries Ltd based in Kitwe which manufactured grinding balls for the mines.[43]Additionally, Nega-Nega and Kalulushi brick works faced reduced profits due to the capital-intensive technology used despite utilising local clay.[44]

Chilanga Cement Company Ltd was established on 29 July1949 with the government owning 40 percent shares. The Commonwealth Corporation held 30 percent of the shares and

[38] GRZ, *INDECO Annual Report* 1979/1980. (Ndola: Monterey Printing and Publishing, 1980), pp.38-41.
[39] GRZ, *New Economic Recovery Programme* July 1987 to December 1988. (Lusaka: The Government Printer, 1987), p.154.
[40] NAZ, ZIMCO 1/2/495, Mansa Batteries Ltd 1988-1989.
[41] NAZ, ZIMCO 02/6956/131, Fourth National Development Plan, 1985-86.
[42] GRZ, *INDECO Annual Report* 1982, pp.37-38.
[43] GRZ, *INDECO Annual Report* 1982, pp.37-38.
[44] GRZ, *Third National Development Plan*, 1979-1983, p.238.

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the remaining 30 percent was public ownership. The goal was to enhance clinker-production capacity by adding a third kiln at Chilanga and a new kiln at the Ndola factory. This expansion aimed for an annual cement production of 300,000 tonnes to achieve self-sufficiency in Zambia. The third kiln at Chilanga began operations in August 1967. Commissioning of the Ndola plant in 1968 raised production capacity by an additional 200,000 tonnes annually.[45] Limestone was sourced locally from *Shimabala*, while coal came from Maamba colliery. In 1977, the company exported 15,000 tonnes of cement to Zaire (now DRC), Tanzania and Burundi valued at k380, 000. During the 1981-82 period, cement sales volume reached K1, 635 million and exports increased by 15 percent valued at K2, 939 million. In 1990, President Kaunda recognised foreign exchange earnings of companies like Chilanga Cement Company Ltd, KTZ, ZSC Ltd and ZAMEFA during the fifth National Convention on the INDECO Group of Companies.[46] Table 3 below shows production of cement at Chilanga Cement Ltd and profit from 1976-1989.

Table 3: Production of Cement in Tonnes and Pre-Tax Profits in Millions, 1976-89

Year	**1976/77**	**1977/78**	**1978/79**	**1979/80**	**1981/82**	**1983/84**	**1988/89**
Pre-tax profit	K1.6m	K1.8m	K2.1m	K3.251m	K10.027m	K9.900m	10.040m
Cement in tonnes	203,000	244,000	278,000	288,000	621,000	651,000	670,000

Source: Compiled from the INDECO Review Volume 7 Issue No. 6, January – April, 1990 and *INDECO Annual Report 1988/89*, p.50.

CSS Ltd was established in 1974 as a subsidiary of INDECO after nationalising three foreign-owned quarry companies. The company operated factories in Lusaka West, Ndola at Ndola Lime Factory and at Mindolo in Kitwe. The products made by CSS Ltd comprised talc, lime, crushed stones and aggregates. Commercial production began in 1979 providing various crushed stone sizes for the construction industry. The Lusaka West factory produced burnt hydrated limes for local manufacturers of paint, water purification systems and refining of sugar at ZSC.[47] The Kitwe limestone works processed limestone from an underground mine. Additionally, the Lusaka West factory processed the Lilayi talc and limestone into lime flour grades one and two as well as

[45] GRZ, *INDECO, Seventh Annual Report* 1966, p.14 and GRZ, *INDECO, Eighth Annual Report*, 1967, pp.17-20; GRZ, *Second National Development Plan* 1972-1976, p.27; GRZ, *A Survey of Zambian Industry* 1970.(Lusaka: INDECO, 1970), P.28 and GRZ, *Register of Manufacturing Industry*, p.2.
[46] INDECO Review Volume 7 Issue No. 6, January – April, 1990.
[47] NAZ, ZIMCO 1/2/4, Action plan and status report on Crushed Stone Sales Ltd.

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pure talc powder. These products were sold to local companies, such as National Milling Company Ltd aiding in stock feed production.[48] Table 4 below shows production of talc, aggregate, lime and pre-tax profit as well as loss at CSS Ltd, 1979-1985.

Table 4: Production of Talc, Aggregate, Lime, in Tonnes, Pre-Tax Profits/Loss in Millions 1979-85

Year	**1979**	**1980**	**1981**	**1982**	**1983**	**1984**	**1985**
Pre-tax profit/loss	K186,000 loss	K1.221m	K1.331m	K0.927m loss	K0.360 loss	K2.1m	n.a
Talc/tonnes	112	150	90	100	140	205	200
Aggregate tonnes	442,330	315,696	305,598	308,119	307,363	301,126	300,000
Lime tonnes	2,571	2,144	12,000	17,000	17,120	17,540	17,301

Source: Compiled from INDECO Review Volume 7 Issue No. 6, January – April, 1990 and *INDECO Annual Report 1988/89*, p.51.

Between 1982 and 1983, CSS Ltd experienced major losses due to underutilisation and machinery breakdowns. However, the company achieved notable export earnings from industrial lime k485, 000 and k223, 000 for talc to Malawi in 1983. A 1985 Industrial Development Advisory Team (IDAT) report recommended reducing the workforce from 360 to 180 to enhance profitability. In 1986, successful rehabilitation allowed CSS Ltd to produce 160,000 tonnes of crushed stones annually for Zambia Railways' ballast needs.[49]Despite challenges, CSS Ltd contributed significantly to Zambia's ISI goals and demonstrated the economic viability of the Lilayi talc. The company was privatised on 1 December 1994 and sold to the MBO Team for k110 million, retaining 125 employees.[50]

RUCOM Holdings Division

The Rural Commercial Holdings (RUMOM) Division included several companies, notably in milling and agriculture. Key subsidiaries included the National Milling Company Ltd, INDECO Milling Ltd, RUCOM Industries Ltd, Supa Baking Company Ltd, Zambezi Saw Mills Ltd (ZSM) and Mining Timbers Ltd. RUCOM Industries Ltd operated the Mwinilunga Pineapple Canning Factory, producing 13,000 cases of canned pineapples and Guavas annually, sourced from local farmers.

[48] GRZ, *INDECO Annual Report and Accounts for the year ended 31 March* 1975, p.27; GRZ, *INDECO Annual Report* 1976/1977, p. 22 and GRZ, *INDECO Annual Report* 1979/1980, p.36.
[49] NAZ, ZIMCO 1/3/54, Minutes of the investment structure sub-committee of the fourth plan macro planning committee held on 15 November 1985; GRZ, *INDECO Annual Report* 1982, p.17 and GRZ, *INDECO Annual Report* 1983, p.37.
[50] GRZ, *Privatisation Programme Progress Report* as at 31 July, 2000. (Lusaka: Government Printer, 2000), p.5.

Apart from this, the cannery had another section called the *Chati* wood workshop which manufactured wooden crates, boxes and pallets using local wood from ZSM. Production could reach up to 30,000 cases of crates and boxes, aligning with ISI goals. Labour force was 420 people. RUCOM Industries Ltd also grew coffee at a farm near Kasama and set up a processing plant in the same area. The plant could process up to 64,204 kgs of coffee annually for domestic and export purposes. Although Supa Baking Company Ltd became the largest baker of bread in the country, it used both imported and local flour. The company operated two modern bakeries, one in Lusaka and the other one in Kitwe.[51]

The National Milling Company Ltd, established in 1968, operated four mills producing roller and breakfast mealie-meal, wheat flour, maize bran and stock feed. INDECO milling founded in 1967 had a large mill in Ndola and additional rural mills, with expansions continuing in 1980. Other subsidiaries, Choma Milling Company Ltd (1979) and United Milling Company Ltd in Chingola started production in 1984 which further boosted mealie-meal production achieving 240,028 tonnes annually entirely from local maize. This made the country to be self-sufficient in mealie-meal production. Moreover, both milling companies also imported and distributed salt and rice.[52]

In 1968, INDECO purchased ZSM Ltd from the Susman Brothers and made it a state-owned entity. INDECO modernised ZSM's facilities leading to resumption of production in 1975. ZSM operated two sawmills in Sesheke and Mulobezi, focusing on local timber. The company's main products included mining sleepers, railway sleepers, sawn timber and parquet tiles. However, the company faced significant losses in 1975 and 1977 amounting to k458, 000 and k749, 000 respectively due to the breakdown of imported machinery blades. The blades, which were unable to cut through the local hard wood were eventually modified by the local workers at the plant, demonstrating a successful adaptation of foreign technology to local conditions.[53] In 1977, ZSM made its first trial exports of parquet tiles to the USA and West Germany.[54] In 1985, IDAT reported that ZSM Ltd, along with CSS Ltd, was one of the few parastatal companies that had consistently reported zero imports of raw materials over the years.[55]Besides, Mining Timbers

[51] INDECO Review Volume 7 Issue No. 6, January – April, 1990.
[52] GRZ, *Zambia Industrial and Mining Corporation Ltd Brochure*, p.25.
[53] NAZ, ZIMCO 1/2/4, Action plan and status report on Zambezi Sawmills and NAZ, ZIMCO 1/2/4, Progress report on Zambezi Sawmills.
[54]GRZ, *INDECO Annual Report* 1976/1977, p. 22; GRZ, *INDECO Annual Report* 1979/1980, p.37 and GRZ, *Third National Development Pla*n, 1979-1983,p.238.
[55] NAZ, ZIMCO 1/3/54, Minutes of the investment structure sub-committee of the fourth plan macro planning committee held on 15 November 1985; *GRZ, INDECO Annual Report* 1982, p.17 and GRZ, *INDECO Annual Report* 1983, p.37.

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Ltd was transferred to Roan Consolidated Copper Mines (RCCM) and Nchanga Consolidated Copper Mines (NCCM) on 1 April, 1976 to enhance profits.[56]

Breweries and Distilling Division

In the breweries and distilling division, the following were the major companies in which INDECO had a stake: National Breweries Ltd, Zambia Breweries Ltd, Zambia Sugar Company Ltd (ZSC) and Duncan Gilbey and Matheson (Z) Ltd. Zambia Breweries Ltd established in 1968 produced larger beer brands, *Mosi* and *Mchinga* using imported raw materials at its two large breweries in Lusaka and Ndola. However, beer bottles were later supplied by Kapiri Glass Products Ltd. National Breweries Ltd also founded in 1968, was known for manufacturing *Chibuku*, an opaque beer, made primarily from local maize, which gained popularity in both rural and urban areas. *Chibuku* required rapid consumption due to its short shelf-life, leading to establishment of multiple breweries across Zambia employing 2,150 workers. In 1985, these breweries contributed K135 million in excise duty to government revenue. Besides, Duncan Gilbey and Matheson (Z) Ltd as associated companies of INDECO handled the import, blending and bottling of various spirits like Whisky, Brandy, Gin and Vodka. [57]

ZSC Ltd supplied sugar to all the breweries in this division for brewing purposes. ZSC Ltd was incorporated on 1 January 1959 as Ndola Sugar Company Ltd (NSC) which operated a sugar refinery at Ndola and initially relied on imported raw sugar. The company was renamed ZSC Ltd on 31 December 1966 after establishing the Nakambala Sugar Estate (NSE). After nationalisation in 1971, the government's share increased to 78 percent, aiming for self-sufficiency in sugar production by 1974.[58] NSE cultivated 10,000 hectares of sugar cane and implemented out grower schemes on 1,800 hectares in *Kaleya* area.[59] In addition, ZSC Ltd produced a range of sugar-based products which included apricot flavoured jam, introduced in1974 as well as golden syrup, maple syrup, treacle, icing sugar and molasses. By 1988, ZSC Ltd had reached a milestone, exporting 23,339 tonnes of sugar valued at $5 million USD, generating essential foreign exchange for the importation of spare parts and machinery. Moreover, molasses emerged as a significant contributor to export earnings with key markets in Zimbabwe and Western Europe.[60] Table 5 below shows production of sugar in tonnes and profit, 1976-1989 at ZSC Ltd.

[56] GRZ, *Zambia Industrial and Mining Corporation Ltd Brochure*, p.25.
[57] GRZ, *Zambia Industrial and Mining Corporation Ltd Brochure*, p25.
[58] GRZ, *INDECO, Seventh Annual Report* 1966, p. 19 and the Zambian Review November 1967, pp.15-19.
[59] Zambia Geographical Association Magazine No. 25, January 1974, p.37.
[60] NAZ, ZIMCO1/3/5, The Zambia Sugar Company Chairman's Report 18/09/1988; *Zambia Industrial and Mining Corporation Ltd Brochure 1985,* p.23 and GRZ, *INDECO Annual Report* 1979/1980, p.27.

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Table 5: Production of Sugar in Tonnes and Pre-Tax Profits in Millions, 1976-1989

Year	**1976/77**	**1977/78**	**1978/79**	**1979/80**	**1981/82**	**1983-84**	**1988/89**
Pre-tax profit	K5.5m	K5.7m	K1.3m	K1.060m	K12.850m	K5.600m	K5.900m
Tonnes of sugar	47,000	66,000	73,450	96,075	150,000	160,000	163,000

Source: Compiled from the INDECO Review Volume 7 Issue No. 6, January – April, 1990 and *INDECO Annual Report 1988/89*, p.50.

From the discussion above, it can be seen that more than 50 percent of the products manufactured by INDECO Group of Companies were used as intermediate products by other firms while 60 percent as final consumption. Notably, both parastatal entities and private companies were significant users of INDECO's intermediate products with exports representing approximately 10 percent of overall production. Industrial production index for 1987 showed the following percentages: food, beverages and tobacco, 110.5, textiles and clothing, 207.9, wood and wood products 40.7, paper and paper products 253.7, chemicals, rubber and plastic, 72.5, non-mineral products 80.4 and basic metal industries 57.7.[61] Furthermore, GDP contribution of the manufacturing sector saw consistent growth with percentages of 19.4 in 1984, 20.6 in 1985, 21.4 in 1986, 21.7 in 1987, 22.0 in 1988, 32 in 1990 and 30.5 in 1991.[62]

Key government interventions spurred Zambia's manufacturing sector between 1964 and 1991 through various Acts, judicious allocation of foreign exchange to the manufacturing sector and devaluation of the currency. The IDA of 1977 and subsequent Acts, SIDO 1981, VIS 1981, EDA 1985, ZABS 1982 and Investment Act of 1986 incentivised industrial activity and standardisation. The Investment Act of 1986 diversified investment opportunities beyond manufacturing to agro-industries, tourism and exports.[63] Foreign exchange allocations to the manufacturing sector for the selected years was as follows: K141,941,222 in 1979, K184,000,000 in 1980, K203,551,547 in 1981, K150,470,803.00 in 1982 and K180,000,000 in 1983, demonstrating government support. The IDA of 1977 facilitated technology transfer via licensing and contracts, enhancing industrial capabilities which were not provided for in the Pioneer

[61] GRZ, *Economic Report* 1987. (Lusaka: National Commission for Development Planning, 1987), p.30.
[62] GRZ, *New Economic Recovery Programme* July 1987-December 1988, p.11; Stephen Miti Kapunda, "Beyond the impasse of African Development: the case of Botswana, Tanzania and Zambia", *Journal of Africa Development* (2007), Vol.32, No.4, pp.99-108 and GRZ, *Fourth National Development Plan* 1989-1993 Vol.I and II. (Lusaka: National Commission for Development Planning, 1989), p.ii.
[63] GRZ, *Annual Report for the Ministry of Commerce and Industry* 1986. (Lusaka: The Government Printer, 1986), p.14.

Industries Act of 1965. SIDO and VIS Acts of 1981 promoted medium and small-scale industries, particularly in rural areas while ZABS Act of 1982 established quality standards, publishing 26 by 1986, focusing on food, chemicals, textiles and metal products.[64]

The EDA of 1985 was enacted to promote Zambia's non-traditional exports through international trade fairs. Zambia joined SADCC in 1980 and PTA in 1981, enhancing regional trade relations. In 1985, Zambia participated in 12 out of 15 approved trade fairs, achieving test sales of $362.925 USD (K1.5 million) and confirmed orders worth $15.2 million USD (K75.11 million) alongside unconfirmed orders totaling to $54.5 million USD (K278.2 million).[65] In 1986, Zambian companies took part in 9 trade fairs, securing confirmed orders from Zimbabwe amounting to $ 2,720,890.91 and unconfirmed orders of $29,738.78 all in Zimbabwean dollars. Additional PTA orders amounted to $5 million USD.[66]

The years 1987-1988 witnessed remarkable advancements in Zambia's trade concerning non-traditional goods. Conspicuously, there was a shift in the balance of trade that favoured Zambia. Key export markets included UK, USA, Zimbabwe, Swaziland, Botswana, Zaire, Malawi, Tanzania and Burundi. Within Africa, Zimbabwe, Zaire and Tanzania emerged as key markets. Furthermore, beef exports to West African nations showed potential for growth. Main exports to the UK were cotton, fruits, vegetables, groundnuts and semi-processed leather. Exports to the USA included curios, live fish, books and game trophies. Exports to the PTA region included *Chitenge* material, copper products, acrylic yarn, men's suits, chemical products, cement, wooden curios, hand crafts, talc, timber, dressed chickens, river sand, scrap metal, crocodile skins, fresh fish, *Kapenta*, smoked sausages, kitchen utensils, potatoes, onions and petroleum products.[67] In 1990, the involvement of local companies in the international trade fairs yielded positive results; 67 companies participated and obtained orders worth $33,597,749 USD with test sales reaching $34,333.24 USD. That same year, Zambia won four trophies in the exhibitors' category: first prize at the Windhoek trade fair and third prizes at the PTA trade fair, Manzini trade fair and Zimbabwe trade fair.[68]Thus, between 1984 and 1988, some of INDECO companies embarked on rehabilitation programmes that enabled them to increase capacity utilisation.[69]

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[64] GRZ, *Annual Report for the Ministry of Commerce and Industry* 1986, p.14.
[65] GRZ, *Annual Report of the Ministry of Commerce and Industry* 1985. (Lusaka: The Government Printer, 1985), p.23.
[66] GRZ, *Annual Report of the Ministry of Commerce and Industry* 1986, pp.5-15.
[67] GRZ, *New Economic Recovery Programme* July 1987-December 1988, pp.163-165.
[68] GRZ, *Annual Report of the Ministry of Commerce and Industry*1990. (Lusaka: The Government Printer, 1990), p.i.
[69] GRZ, *Economic Report* 1988. (Lusaka: National Commission for Development Planning, 19880, p.87.

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In addition, a crucial government strategy involved devaluing the local currency which increased the costs of imports and in turn, motivated domestic production through local resources. The currency experienced devaluation in 1978, 1983 and 1989.[70] In a broader context therefore, Zambia's trade pattern in 1991 revealed a high dependence on imports in key sectors, encompassing metal and machinery 84 percent, plastic and petroleum 75 percent and healthcare and pharmaceuticals 69 percent. These sectors are characterised by their reliance on capital goods which was necessary in expanding the consumer industrial base of the country.[71] Consequently, there was a decrease in the share of consumer goods in gross manufacturing output and an increase in the production of intermediate goods.

Conclusion

The notion that all manufacturing companies established in the country between 1964 and 1991 relied heavily on imports is an oversimplification. A closer examination of this assertion reveals that some of the companies made significant strides in utilising local raw materials to achieve ISI goals. Moreover, some industries demonstrated a modest ability to adapt foreign technology and improvised certain spare parts and components for machinery. The article has highlighted the success of these companies in developing a substantial export market for their locally produced goods, thereby earning foreign exchange. This, in turn, enabled them to meet their import requirements, including machinery and specialised spare parts that could not be produced locally. The transfer of technology was hindered by some of the suppliers who were reluctant to share their expertise, fearing they would lose their competitive edge. The high cost of purchasing patents for foreign technology and the unwillingness of foreign firms to substitute imported raw materials with local ones further complicated the process. However, the article shows that inter-company transactions within the INDECO companies and inter-linkages were encouraged which facilitated the exchange of raw materials and helped in achieving ISI goals.

[70] Times of Zambia, 1 July, 1989.
[71] Gerry Nkombo Muuka, *SAPs, manufacturing, NTEs and poverty in sub-Saharan Africa: The case of Zambia in the 1990s.* Harare: SAPES Books: 1998), p.25 and NAZ, ZIMCO 1/3/54 INDECO its structural interdependence and re-organised future structure, 1973-1974.

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