

Access mapping and chains: The woodcraft curio market around Victoria Falls, Zimbabwe

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Abstract

The paper uses commodity chain analysis to examine the transformation of access and control in woodcraft markets around Victoria Falls in the context of changing policies in the last two decades. The mushrooming of a transnational market for curios has begun to transform the use and management of forests. The paper discusses the distribution of benefits along the chain. It also elaborates on the relationship between property rights operating at a variety of scales beginning with trees on individual farmland or private property, trees on communal woodlands or common property and trees on state land (protected forests and national parks) or state property with other strategies that actors use to gain and control access at different stages of the commodity chain including harvesting, processing, and marketing. In conclusion, the implications for policy are discussed.

Introduction

Debates over access to and control over natural resources have gained prominence in common property literature over the last few decades (Berry, 1989, Bruce, *et al*, 1993, Mearns, 1995; Rangan, 1997, Ribot, 1998; Agarwal, 1999, Ribot and Peluso, 2003). This paper joins in the debates and adds a dimension of mapping access and control over woodcraft curios along commodity chains around the Victoria Falls market in Zimbabwe. Ribot and Peluso (2003) provide a framework that helps us examine the means to gain access and control over natural resources. What shapes benefits streams and the mechanisms by which they are gained in so far as the relations of production (harvesting and processing) and exchange (vending and marketing) for woodcraft curios around Victoria Falls are at the core of this paper. In terms of the framework for understanding access, I will elucidate the most pertinent components of it for mapping the woodcraft chain in this paper. Accepting that access is viewed as the ability to benefit from natural resources (Ribot and Peluso, 2003), what becomes central is understanding how the benefits might be shaped. That is the "...bundles of power...the means, processes, and relations by which actors are enabled to gain, control, and maintain access to resources", (Ribot and Peluso: 159-160). This they term 'mechanisms' of access and of the ones they discuss what are relevant in this case are both the formal and informal means linked to the rights that they enjoy. In the subsequent discussion of rights-based access, the authors point to the use of laws,

conventions or customs, and include theft, in shaping access relations (Ribot and Peluso, 2003). The slight deviation from the framework will be observed around the illegal access. Although that is formally, theft, there is tacit recognition in the application of the formal institutions of the complexity of enforcement due to the political-economic circumstances as well as the effective resistance (Scott, 1990) of the actors involved. A slight trajectory from the contribution by Ribot, (1998) is taken in the paper by examining how benefits are derived in circumstances of failure of state and traditional institutions. It might be argued that perhaps rather than treat the relations that will be presented here as symbolising 'impotence' of institutions it might be more of a situation resembling circumstances akin to what Bruce, *et al*, (1993) term 'pragmatic controls' or perhaps symbolising outcomes of the agency of carvers (Long and Villareal, 2000) in gaining access to timber resources or all combined. Secondly, in relation to what the authors refer to as structural and relation based access, all of the following mechanisms, including; technology, capital, markets, knowledge, labour, authority and social relations combine in complex ways to mediate how actors benefit from forests and trees.

This paper focuses on the harvesting of timber, initial processing, marketing to local carvers, further processing (carving) into craft pieces and then marketing to intended tourists or buyers. Engagement in the woodcraft markets provides opportunities for villagers in dry environments in North-western Zimbabwe to gain a more reasonable access to income streams. This part of the region suffers from lack of agricultural opportunities (production and marketing of crops and livestock). The onset of trade liberalisation and de-regulation opened up the tourism opportunities in the part of Zimbabwe where most of the craft products are generated. On the other hand, liberalisation led to the loss of formal jobs for a lot of people, coupled with the impact of drought in the early 1990s, led to rapid growth of woodcraft industry as an alternative livelihood opportunity. This study offers an opportunity to understand one of the most intriguing commodity chains in Southern Africa around the woodcraft industry, especially around one of the biggest tourist hubs in the region. The tourist hub provides the biggest livelihood opportunities for many households, especially in north-western Zimbabwe through the sale of woodcraft curios. This activity has led the state authorities in the forestry sector to 'turn a blind eye', given the impact the trade in curios has on marginalised villages in the area. The insights of using the commodity chain analysis provide policy makers with options to support the burgeoning industry. Using this approach also provides insights of where the biggest benefits are captured for the curios.

In relation to the main focus of the paper, two other issues that are related are also discussed. The first concerns access to wood, in so far as it relates to property regimes and control of materials for carving (cf. Campbell *et al*, 2001; Rangan, 1997; Ribot, 1998; Peluso, 1995) across different niches. The first niche pertains to trees on individual farmland or private property, the second, trees on communal woodlands or common property and thirdly, trees on State land (protected forests and national parks) or state property. Across all three niches, the control mechanisms in place determine access for carvers to the resources they need. Different authority systems are employed which influence resource control and ultimately how carvers gain access over carving materials. In relation to State control, the authority systems are influenced not only by conservation concerns, but also by commercial needs that have to be situated in the history of the State forestry bureaucracy (Matose, 2002). At the

second level the study will explore the benefits that carvers derive from the carved materials from the market place, depending on their location, (cf. Gibbon and Ponte, 2005; Ribot, 1998). In this regard, the study will examine the prices of curios across different marketing chains and analyse who benefits and loses in the process. For both these set of issues, there are policy and practice implications for the chain in relation to how best the State can support it without adversely affecting the livelihoods of many households dependent on it in Western Zimbabwe. Therefore the study will bring out the complex intricacies that inform decision makers particularly in a context of economic recession that is plaguing the country at the moment.

The research design

The study is based on two sets of data collections. The first was conducted from March to June 1995 and the second in April 2006. Out of more than 24 markets along the Victoria Falls to Bulawayo road, four large markets (in terms of the number of pieces at the market) were selected for the study. The main justification for this choice was that major trade activity was more likely to be observed around the larger markets than smaller markets. Thus, Mbizha, Mabale, Qhubekani and Kusile-Kweja, being the markets with the largest number of sculptures, were studied initially in 1995. In the follow-up study in 2006, only two of these sites were revisited and an additional two sites in the town of Victoria Falls were included in the study. For both the earlier and latest studies; interviews, discussions and Participatory Rural Appraisal (PRA) exercises were held with carvers and, where feasible, local leaders were also included. PRA techniques used included: seasonal calendars for seasonal variation in sales, wealth-ranking and pair-wise ranking for determining the status of carving in relation to other income generation activities. Discussions and interviews were also held with authorities in the area and owners/managers of shops within the Victoria Falls urban area who are likely to be competitors to the road-side curio vendors.

Location of markets

There are 24 road-side woodcraft markets on the road between Bulawayo and Victoria Falls (Figure 1). The driving force which led to the markets is the presence of a ready demand due to the movement of tourists on the road. The initiation of the Economic Structural Adjustment Programme which in the first five years had had a negative impact on employment levels and real wages, has also played a role in the boom of roadside markets. Most of the markets are concentrated nearer to Victoria Falls. This distribution is influenced by closeness to a tourist attraction, such as the Hwange National Park area and the Victoria Falls. Both tourist areas are serviced by airports. All the major vending markets are located near communal areas from which the vendors come. The seasonal trend in volume of sales mainly depends on the South African school holidays and the movement of overseas tourists. Most sales are recorded around the Christmas festive season. They are lowest between February and June, excluding the Easter holiday period, and between September and November.

The control systems for the woodcraft industry

There are three levels of control for the industry that will be discussed here and each are linked to the three tenurial niches from which the materials for carving are

sourced. These are the individual fields, the communal woodlands and the state forests or national park. Each is discussed in turn and the discussions are influenced by Rangan's (1997: 75) key questions:

To what extent do ecological, legal, economic factors shape the ways in which state agencies exercise control over forests in their possession? Are the forms of control used by state agencies decided purely by administrative fiat, or are they moulded and refashioned by groups within civil society so as to conform to their particular needs and purposes?

Individual fields and communal woodlands

The area of study is generally still wooded and the participants indicated that they do not have problems in acquiring wood. Mbizha and Qhubekani are close to Mvutu and Fuller forests which are a major source of 'poached' wood. In addition, the adjacent communal areas are still fairly wooded. Enforcement of tree cutting in communal areas is mainly done by traditional leaders. Most of the carvers and those who supply wood indicated that they get their wood from their fields. No permit is required when one is cutting trees from his/her own fields. Permission has to be sought from the village head when cutting trees from communal grazing lands. Since the traditional leadership recognizes and appreciates the role the woodcraft industry is playing in alleviating poverty in areas under their jurisdiction, they issue timber movement permits (for the purpose of the Forestry Commission's Forest Protection Unit and Parks and Wildlife Authority patrols) to carvers in agreement with the Department of Natural Resources (now called the Environmental Management Agency). This is particularly prevalent in the Mbizha area which is sited in Fuller and Mvutu forests.

While the traditional leadership is recognized as the institution that is responsible for enforcing rules and regulations regarding tree cutting, the carvers indicated that no offender had been fined by the village heads in the recent past. All what the village heads could do was to caution the offender after interrogation and remind them of the need to conserve trees. This form of pragmatic control will be returned to later in the paper.

State controls

Enforcement by the Forestry Commission is more pronounced when it comes to wood poaching in protected forest areas namely; Fuller and Mvutu forests. Some two years ago, carvers used to get permits from the Forestry Commission to cut dead wood from forest areas. However, the practice has since been stopped following an upsurge in timber poaching by communities (especially carvers) neighbouring to the forests. The Forestry Commission personnel usually conduct checks on the use of wet wood at the roadside market stalls and often confiscate logs and curios carved from wet wood if there is no permit/documentation from village heads that the wood has been legally acquired. The confiscated wood is eventually sold through auction and it appears the carvers comprise most of the buyers. In some cases, the transgressors are taken to the police in Victoria Falls where they are charged \$1.19 per log. Despite all these measures, poaching of indigenous hardwoods, particularly *Pterocarpus angolensis* is on the increase. It would appear that some of the wood poachers are colluding with the Forestry Commission's forest guards.

Overall, enforcement on curio trading is very lax and sporadic outside the gazetted forest areas partly due to lack of capacity and partly due to the fact that it is recognized that the curio industry is playing a pivotal role in alleviating poverty or providing safety nets to otherwise impoverished rural households. While the Communal Land Forest Produce Act prohibits the sale of curios, it is generally recognized that the industry supports the livelihoods of quite a sizeable number of households. To this end, the Forestry Commission is working on the realignment of forest policy and legislation to match with practices at the local level. The Forestry Commission is also at an advanced stage in developing a Statutory Instrument to regulate indigenous hardwood curios.

Hwange Rural District Council

All carvers indicated that they only used dead and very dry wood, mainly for two reasons: first, fresh and wet timber would crack soon after carving thus resulting in a poor piece; secondly, for those who used electrical bits, bits get clogged by fresh wood. The carvers sometimes got offers of wet wood, which were rejected. However, using the presence of cracks on pieces as evidence that a piece was carved out of fresh wood, it was evident that some of the very large pieces were made from fresh wood. Carvers stated that wood was mostly obtained from the communal areas. Even carvers in Victoria Falls got regular supplies from people in communal areas.

Discussions with officials from the District Council, Department of Natural Resources and Forestry Commission indicated the existence of strategies and mechanisms to control wood utilisation in communal areas of Hwange District.

These include:

- The prohibition of the cutting of fresh wood for the purposes of carving and fuelwood.
- The use of Statutory Instrument 166, sub-section 181 (Communal Land Act Land use and Conservation) By-Laws as a guideline for wood utilisation. Defaulters are made to pay a fine for felling a tree illegally.
- Permission for cutting trees is granted by the village head, or by the councillor.
- The engagement of two council employees to ensure that there was no illegal selling of wood in Victoria Falls. The employees had been placed at the national Parks gate on the outskirts of the town.
- Some clubs reported that they police each other to ensure that fresh timber is not used.

While these mechanisms were intended to ensure the sustained utilisation of wood from communal areas, implementing the mechanisms has been slow due to a number of factors. First, and probably the most important is political interference. A few words such as “tree are supposed to make people survive” from political leaders, leads to carvers to often disobey local rules and regulations. Second, local leaders realise that carving generates much income for the families involved, and in the face of persistent drought are reluctant to implement the rules. In communal areas, people have rights to clear trees for the purpose of cultivation. Some trees are felled under the pretext of cultivation. Local authorities have also observed that people get around the rule of not cutting fresh wood by ring barking the trees first then felling them once they looked dry.

Whereas the felling of trees for carving is prohibited, it was reported that at times people cut trees from their fields to reduce shading of crops by trees. The species

currently left in fields are suitable for carving, but will presumably be cut over time for carving. Vendors reported that trees in fields were sometimes sold for very little. On other occasions, the owner of the tree would merely demand a portion of the money obtained after the crafts obtained from the trees that were sold. The carvers indicated that in some cases they used dead wood remaining from the destruction of trees by elephants, trees which died after the extraction of honey or wood left by companies collecting timber under concession arrangements with the RDC.

The Hwange Rural District Council has jurisdiction over natural resources in the communal areas. It issues operating licences, at a fee (\$50/year), to the roadside operators. It is now in the process of charging lease fees (\$50/year) for the land on which the traders are operating from. Funds permitting, the RDC is supposed to provide facilities that include well-built market stalls and toilets. The RDC also issues a receipt book to the roadside operators upon payment of the licence fee which receipt they issue to customers who would have bought curios for use as some form of a curio movement permit. In order to regulate the curio industry (and for ease of revenue collection,) in the district, the RDC has designated six roadside market stalls between Hwange and Vic. Falls. All stalls in undesignated sites have to disband and join those recognized by the RDC. This then has become a source of conflict between the local authority and carvers since the mid-1990s. Essentially carvers with undesignated stalls have resisted being moved over time.

Ministry of Transport

The Transport Ministry who are in charge of the highway requires that market stalls be sited at least 70m from the road. Pegging of the sites has since been done and the stalls have yet to shift in order to comply with this requirement. As with the local authority, the ministry also continues to have unsuccessful battles with poorly sited market stalls.

Victoria Falls Municipality

The Victoria Falls Municipality (VFM), as an arm of the state, controls trade in the town. The carvers and traders pay rentals and operating fees to the VFM who in-turn provides facilities that include sheltered stalls, toilets and tapped water. The market stall was established in 1988. There were also street vendors who sold their curios outside this market. In 2005, under 'Operation Clean-up/Restore Order' (http://www.un.org/News/dh/infocus/zimbabwe/zimbabwe_rpt.pdf), the VFM rounded up all street vendors who comprised mainly of curio traders. The curio vendors, numbering about 320 were allocated a stand from where to operate. Currently, they are housed under makeshift structures and the VFM will construct permanent structures once funds become available.

Apart from ordering from carvers in communal areas and roadside markets, some carvers do their carving in the residential areas and take the finished or semi-finished pieces to the two trading sites in the town centre. Although the VFM does not allow backyard industries in residential areas, the practice appears to be very prevalent with logs being delivered from nearby communal areas to carvers in the residential areas by ox/donkey drawn carts.

Species selection and volumes

At this point it is pertinent to highlight what the impact of the industry on the forest environments. At the time of conducting the ecological impact study in 1995, nine tree species are used by the carvers. These are: *Kirkia acuminata*, *Pterocarpus angolensis*, *Baikiaea plurijuga*, *Combretum imberbe*, *Azelia quanzensis*, *Schinziophyton rautanenii*, *Dalbergia melanoxylon*, *Guibourtia coleosperma* and *Sclerocarrya birrea*. *K. acuminata* was the most frequent species among the small carvings, generally followed by *P. angolensis*. Overall, *A. quanzensis* was the most used species, by volume, for the medium sized pieces (Matose *et al*, 1997). Over all, the three species with the highest volumes were *B. plurijuga*, *A. quanzensis* and *K. acuminata*.

Observations made around the biggest markets in the 1995 survey indicated that for 34% of the trees cut, carving of the rough outline of the piece took place at the stump. In 39% of the cases the crown was left behind unutilised initially but in half of these cases carvers had started revisiting the same stumps for the crown wood. Most of the secondary processing and final touches took place at the market place. At Mbizha processing took place at homesteads, far from the market place, and the finished carvings are transported by ox-drawn carts to the market. In the 1995 survey, a recovery rate of 25% in the whole woodcraft production process was assumed, such that the total volume of timber harvested amounted to about 2600 m³ per year (Matose *et al*, 1997). By comparison, the individual timber logging companies that harvest *P. angolensis* and *B. plurijuga* extract on average 5000m³ of millable timber per year, with a 'recovery' rate of about 30%, which means that each of these loggers, cuts down the equivalent of 16 600m³ of timber, of which 11 600 m³ is left to waste at the stump. Thus the amount used by carvers is only a small proportion of the "waste" of the commercial logging companies. However, it is clear that the utilisation intensity is much higher in the communal area than in the State Forest where the timber is being harvested illegally. As a result of illegal activity in State Forest, recovery rates are very low in those areas. The 1995 work also indicated that most of the timber harvested for the production of large carvings came from old trees left standing in agricultural fields.

The woodcraft marketing chain

Participants in the woodcraft business are at various levels namely: those who supply wood/logs, those who carve, those who do finishing touches such as smoothening and polishing, those who order for resale, and those who do a combination of the above. The study concentrated on the roadside and town markets where selling of finished products and finishing touches (e.g. smoothening using sandpaper, branding – i.e. putting marks on pieces such as giraffes using hot iron rods and polishing) are conducted.

The interviewees indicated that they obtain most of the wood from fields and communal grazing areas. However, information obtained from the Forestry Commission indicates that gazetted forests are also a major source of wood for the carvers. For small and medium pieces (up to 1.5m in length/height and less than 0.5m in width), the logs are transported to the villages or residential areas in Vic. Falls town

for carving while for large artefacts, the carvers first shape the piece out in the woodlands until the piece gets to a manageable size that can then be carried home or to the market stall for finer touches. Most of the vendors at the market stalls order unrefined pieces from the carvers in the surrounding communal areas and put finishing touches before selling.

Attempts to trace the value addition chain of a medium sized giraffe (1.5m height and 0.3m width -*P.angolensis*) from carvers in villages at Qhubekani and Mbizha up to the Vic. Falls town revealed a very wide margin: the carver would buy the log from suppliers for \$0.70; the carved rough piece would be ordered at \$1.20; sandpapering and branding would cost \$0.48; polishing would cost \$0.70; and the polished piece would go for between \$2.86 and \$3.80 at the road side stall. The same piece was going for between \$7.14 and \$11.90 at the Vic. Falls stalls while the same piece had a price tag of \$19-\$24 in curio shops. The wide margin was attributed to the relatively high number of tourists who visit the town. The traders also argue that they pay 'rent and monthly licence fees' to the VFM. On the other hand, the curio shop owners claim that their clientele are tourists who only buy genuine artefacts from known sources. The trend is the same for all the other types of curios.

The estimated value (average for an individual) of carvings at Mbizha and Qhubekani is shown in Table 5. The pieces do not have a standard price except for those in curio shops in Vic. Falls which have price tags. Pricing at the stalls is often through protracted negotiations and prices also depend on the financial status of the vendor at any one given time. For instance if the vendor desperately needs cash to meet immediate needs, then he/she would be prepared to accept a lower price. The roadside traders indicated that they realise on average between \$14 and \$60 monthly depending on the 'tourist season'. Earnings are highly variable with some traders reporting that they can go for up to two months without registering any sales. Buyers pay either in cash or kind. The same range of artefacts is found in Victoria Falls stalls and formal curio shops and earnings are much even higher.

Table 5: Estimated value of wood pieces per market (1995 Z\$ in thousands®)

Market	km peg	Small Z\$000	Medium Z\$000	Large Z\$000	Very Large Z\$000	Total Z\$000
Mbizha	400	13.7	22.1	31.7	61.8	129.3
Rest of the markets*		93.9	68.7	100.2	36.3	299.1
Total (all markets)		200.5	167.4	241.1	130.1	739.1
Total (all markets) %		27.1	22.6	32.6	17.6	

*Computed from average of five small markets ® Rate at the time was US\$ = Z\$8.50

Pieces sold on the road side are carved by the vendors themselves, or by carvers from local villages who do not sell on the road. In addition some pieces are bought from the carvers in Victoria Falls. Some vendors depend on purchasing pieces, others only sell what they carve themselves, while others depend on both purchases and some own carving. Internal trade of woodcarvings among members was said to be prevalent

because the vendors wanted to ensure that even those who could not carve were given the opportunity to make a living from the industry. Purchasing of pieces from Victoria Falls is more prevalent in markets close to Victoria Falls because of the lower transport costs to Victoria Falls and the higher concentration of carvers. At the Qhubekani Club (416 km peg) there are 12 women members who sell both wood and cloth pieces. The wood pieces are purchased from carvers around the Victoria Falls airport. Other carvers in the local villages who do not sell at the road markets sell directly to curio shops in Victoria Falls. When pieces were sold among members of the woodcraft industry such pieces were often exchanged in a rough and unfinished form. The purchaser then has to work on the piece quite extensively. This involves smoothing with sandpaper and shining with shoe polish.

The major buyers of the finished woodcraft are tourists. South Africans who travel by road constitute the bulk of the buyers for the roadside vendors. Other tourists to Victoria Falls and Hwange national Park are handicapped by a number of factors. For example, they are unable to carry heavy loads due to baggage restrictions on airlines, and many tourists normally use credit cards, for which vendors do not have machines. International tourists are not as exposed to the roadside markets as the South Africans, as most of them do not travel by road independently. Zimbabwean tourists form a very small component of buyers.

Table 2: Number of participants per market, and per cent of women vendors

<i>Market</i>	<i>Kilometre peg</i>	<i>Number of participants</i>		<i>Women (%)</i>	
		<i>1995</i>	<i>2006</i>	<i>1995</i>	<i>2006</i>
Mbizha	399.5	130	155	9	
Qhubekani	416	58	150	38	
All markets		940		144	
All markets (%)		100%		15%	

Most vendors did not have any idea about what happened to the pieces once they had been bought. At Mbizha the vendors indicated that they were aware that some of their pieces were being sold in South Africa. Most vendors said that they were aware that higher selling prices were achieved for their pieces in South Africa. For example, pieces bought at Mbizha might end up being sold for as much as six times more in South Africa.

The number of vendors and value of the benefits

Interviews and discussions with councillors, a chief, village leaders and the carvers and vendors revealed that the marketing of wood sculptures is an important source of income for many villagers in the study area. Generally the vendors have no hard feelings that the numbers of vendors are increasing and that this is having an adverse effect on the demand for their business. The quality of pieces was also reported to be increasing due to increased competition. Some of the participants in the industry are people who were recently retrenched. The rest were unemployed before they ventured into this industry. Nearly all the people participating in marketing are from the adjacent communal areas. The exception was at Qhubekani where some participants came from the airport compounds adjacent to the markets. The 1995 survey estimated that approximately 3% of the population is involved in the curio markets. The industry also employs other people in the marketing chain since some people just carve, without selling their produce on the road market, while others collect and sell

wood to carvers. One councillor estimated that 25-30% of all households were involved in the woodcraft industry. According to him, “all young able-bodied men” from his ward were engaged in the trade.

Table 3: Characteristics of the wealth strata in Mbizha Area

Characteristics	Rank Group I	Rank Group II
Percentage of population in stratum	53%	47%
Age	Youthful people	Old people
Indicators	Poorer, depend on casual jobs and house construction for payment. Carvers are found in this group.	Quite a number have no fields, others are handicapped or widowed or aged and helpless. The majority survive on sale of cattle.

To establish whether the people taking in the woodcraft industry were better or less well off than the rest of the community, a wealth ranking exercise was conducted. For a village where the largest number of participants at Mbizha came from the households were listed. A group of four men and a woman composed of a VIDCO chairman, VIDCO secretary, a headman and two ordinary villagers took part. They were requested to place the cards with names of each member of the village into groups to represent differences in wealth on the village. The group only split the village into two wealth strata (Table 3). The carvers were ranked in the poorer strata. Attempts to conduct similar exercises elsewhere did not yield anything, because farmers felt they could not place people into categories since it might prejudice certain persons. It was evident that farmers were afraid of being accused of having denied drought relief supplies to some people or being accused of betraying the wood carvers. It was evident that the wood carving business was politically sensitive. However, what the people were stressing was that those participating in the carving industry were not necessarily any better than the rest of the community. Even when compared to the other sources of income in the village, the woodcraft industry did not emerge as the activity on which the greatest proportion of the population dependent. Pair-wise ranking exercises were done with the woodcarvers to determine the relative dependence of the villagers on various income generating activities. Other activities such as poultry production for marketing, cattle herding, beer sales, gardening or selling vegetables were important activities (Table 4). Other groups reported that there were very few options for them to raise cash. Woodcarving, as an income generating activity, provides “medium” incomes to most of the communities involved. Selling beer, poultry projects and market gardening provided greater incomes to a larger number of people per given community, hence the ranks 1 or 2. All vendors argue that the selling of woodcarvings is the most reliable income-generating opportunity. Formal employment can no longer be depended upon since many companies have retrenched workers in the last few years. Some of the vendors were victims of retrenchment. At Mbizha, it was actually after retrenchment that the chairman and secretary encouraged others to form a club and start selling woodcarvings. Besides, the whole area lies in Natural Region IV and is characterised

by low and unpredictable rainfall. In recent years most households have not been able to produce enough food for home consumption, let alone any produce for sale.

Table 4: Rankings of sources of household income

Activity	Mugarayi	Kokekeke	Ndhlovu
Wood carving	4	4	4
Farming	N.A.	6	N.A.
Basket making	4	N.A.	N.A.
Carpentry	N.A.	3	N.A.
Herding cattle	6	6	1
Poultry	1	1	7
Vegetable vending	2	4	5
Selling:			
Goats	2	N.A.	6
Beer	N.A.	1	2
Cattle	N.A.	N.A.	2

Mechanisms of access around the woodcraft chain

In this section I return to the framework (Ribot and Peluso, 2003) I started with in the introduction and really examine how different people in the woodcraft industry derive benefits along the chain.

Differentiation of carvers

The percentage of women taking part in the carving and/or marketing of woodcraft was very low (Table 2). Only at the Qhubekani market where most of the participating women came from the airport compound, was the proportion of women high. The vagaries of the industry tend to favour youthful men to the detriment of women and older men. The various stages of processing wood into a curio are labour intensive such that depending on the circumstances of a household, only men in their active years are involved. However, some women are engaged in using sand paper and polishing before marketing due to their access to technology, knowledge and their relations involved in the industry as well.

Access to social relations, identity

The table below summarises access surrounding belonging to a club and the fees involved.

Site	Location (km peg Byo-Vic. Falls road)	Organisation/Characteristics
Mbizha	398km - on the boundary of Fuller and Mvutu Forest Areas	Known as Sindujila Co-operative consisting of about 155 members from the surrounding communal areas some coming as far as Jambezi, some 45km away. Those who come from further afield camp at the roadside site for a period ranging from 2 weeks to a month. Was established in 1992 with operations being guided by a constitution. Joining fee was \$300 000 in 2002 and raised to \$2.5m in 2005. Monthly contribution is \$50 000 and a guard who provides

		security during the night is paid \$4m/month. The co-op has been paying \$10.5m/year to the Hwange RDC as licence fee to operate. They now have to pay another \$10.5m/year as lease fee. The Co-op is issued a receipt book by the RDC for receipting those who would have bought curios for use as a form of curio movement permit. The main pieces are bowls and animals such as buffalo, elephant and hippo made from <i>Kirkia acuminata</i> , <i>Combretum imberbe</i> and <i>Afzelia quanzensis</i> .
Qhubekani	416km - just outside the Airport	Known as the Airport Curio Trading Association and established in 1990. Membership was initially 250 but has since dropped to about 150 due to a slump in the number of tourists/market and migration of some participants to the relatively lucrative Vic. Falls market. The association consists of 3 groups, namely Qhubekani, Thuthukani and Hloniphani. Most of the members, including women, come from the Airport 'compound' and surrounding communal areas/villages. Joining fee is \$800 000 as a group. Monthly contribution is \$400 000 as a group and \$1.5m /month/group for security. The association has been paying \$10.5m/year to the Hwange Rural District Council as licence fee to operate. They now have to pay another \$10.5m/year as lease fee. The Co-op is issued a receipt book by the RDC for receipting those who would have bought curios for use as a form of a curio movement permit. Giraffes made from <i>Pterocarpus angolensis</i> are the dominant pieces at this site.
Vic. Falls	2 sites in town	<p>One site comprising of 4 groups (Sizanani, Qhubani, Bhaka and Chinotimba with an average membership of 120/group) was established in 1988. Participants pay \$615 000/month /individual (reviewed after every 3 months) in addition to \$400 000/year/individual fixed charge to the Vic. Falls Municipality (VFM) and they are issued with individual identity cards which show that they are registered with the VFM. The VFM also issues the participants with a code of ethics on how to operate – e.g. touting is not permitted. Members occasionally contribute money when need arises e.g. when they have to be trained in business management. The VFM has constructed shades from where the traders operate. There is also running water and a toilet. The site is adjacent to well established formal curio shops and is easily accessible. About 90% of the carvings are made of wood while the remainder is stone. Most of the clients prefer wood which is lighter.</p> <p>The second site, known as Sinathankawu, comprising 320 members was established in 2005 following Operation Murambatsvina/Hlalani kuhle which prohibits vending on the streets, entrance to hotels and tourist sites such as the Falls. Participants pay to the VFM just like those at the other site. However, they are housed in temporary shelters about 100m behind the other site and the VFM has yet to construct permanent structures. Again, the group claims that they are located at a secluded place that is not easily seen by the tourists.</p>

- Exchange rate during the study was US\$1 = Z\$210 000 on the parallel market

Income flows

Figures about incomes derived from the industry were rather low, as most carvers were insecure about what would be done with such data. Carvers were afraid that the income data would be used against their families benefiting from drought relief programmes. Most vendors were not prepared to give up the activity for formal employment. Woodcarving was argued to provide a more secure source of income than employment in the present economic situation, where retrenchment could occur at any time.

From the 1995 survey, the average cash income from carving is around \$400 per person per month. Figures obtained from members of the Mbizha Cooperative indicate that the average monthly income is only \$42, while for Ndhlovu, it is \$390 and Qhubekani, \$200. Over the twelve month period, May 1994 – April 1995, for Mbizha, the highest incomes were obtained in May when an average of \$79 was achieved. While the mean is low, there is also high income variation among members. The vendors at Mabale estimated that individually they made around \$4000 per annum in cash while the same value was also received as payment in kind. Across all markets, sales through barter deals were reported to be increasing. Items such as clothes, shoes, watches, radios and cameras are exchanged for a piece of sculpture. In most cases such payment constituted half of the total value of the sale while the remainder may be paid in cash.

Access to authority and illegal access

Only the vendors located at the designated sites are happy about the idea. Such vendors are already receiving recognition from council. Chairpersons of these markets are invited to for a where the council discusses issues related to the woodcraft industry. The vendors from the four proposed sites also paid levies of \$150 per year to the Council up to 1992/.93. Thereafter there was a proliferation of markets and they have not paid the levy because the Council has not developed any infrastructure. The majority of the vendors located at sites other than the four designation sites are against the relocation of their market places. Their argument is that moving their marketing site would increase the distance they would have to walk daily. Already some of them have to walk more than 20 km to and from the market each day. Vendors even take turns to monitor the markets in order to reduce the burden of walking to the market. People might not be able to go back to their homes at the end of each day, if the markets are relocated. Some vendors indicated that they were satisfying multiple functions while working or selling their woodcarvings. Once they are removed from this location they would not be able to carry out this function. Also, once moved, transporting pieces to the market will be difficult due to increased distances.

Contrasting views were expressed regarding who should be responsible for the provision of shelter. Mbizha and Mabale were in the process of building their own marketing sheds. Others, for example Kusile-Kweja, whose members had been paying levies to the council, believed that it is the role of council to construct sheds and toilets, and to supply water. Qhubekani Club have raised their joining fees from \$150 to \$350 since the market was initiated in 1992. The club would like to build a shed and toilets. The plan for the shed had already been prepared at this club.

The land-use rights for market sites differ from one market to another and are often not clear. The Mabale Society members at the 265 km peg seemed to be confident of their right to use the land since they had the support of the local councillor. However, a society such as the one at Mbizha was facing problems from both council and Ministry of Transport. The Mabale group were moved from their original site because it was on road servitude. Their present site is at a place where the road makes a sharp curve. This prompted officials from the Ministry of Transport to suggest that it would be dangerous for motorists to stop at such a market. Consequently, the vendors are hesitating from constructing permanent structures due to lack of security.

Conclusions

The study revealed that the woodcraft industry is complex and dynamic. The industry has recently flourished and there are a host of different stake holders. Woodcarving provides a source of livelihood to nearly a thousand households in a dry part of the country. The households participating in the industry get around \$14 to \$60 a month. The number of participants in the industry is increasing due to the heightened unemployment in the Zimbabwean economy, recurrent drought and the continuing flow of tourists visiting the region. Although carvers argued that the benefits derived from the activity is surpassed by other income generating activities like beer brewing and selling, and market gardening, woodcarving still remains a source of living for a substantial number of families.

Benefits derived from the woodcraft chain vary along the various points depending on the labour put into the curio, access to the tourist market (that is whether or not there are increased volumes of tourists passing through the marketing point), access to knowledge about the market and what curios sell best. However, the paper has also pointed out the agency of actors in the woodcraft chain which results in the control mechanisms across various tenurial niches being loosened in their favour. Community leaders who are accessed by the carvers are unable to enforce local rules that inhibit the felling of trees for carving wood. At the same time, various arms of the state likewise are unable to enforce the formal means of access to trees on protected forests out of expediency given the harsh economic climate in Zimbabwe. Expediency and pragmatism are also applied to other forms of state control over the woodcraft industry, especially in relation to the siting of market stalls and processing activities.

Given the contributions of the woodcraft industry to the families involved the recognition and support of this new form of wood utilisation is needed at the policy level across different spheres of it. Recognition and support would have to be followed by a number of steps being taken to ensure sustainability. A number of policy considerations have emerged from this study. First, a wood-supply system that is not detrimental to the woodlands and ensures a constant supply of wood to the carvers needs to be established. Lessons can be learnt from the firewood supply system being implemented between the Department of National Parks and Wildlife management and Tangenhamo Cooperative in the Victoria Falls urban area and the system that used to operate between the Forestry Commission and vendors around the Victoria Falls airport. The Forestry Commission, National Parks and other private landholders, have dead/dry timber on their lands. The timber accumulates as a result of timber concessions, natural deaths, elephant damage and fire.

Secondly, wood-use monitoring mechanisms that involve the carvers themselves need to be established, as previous mechanisms did not involve the carvers. With the mistrust that exists between the council and the vendors, any external monitoring mechanism will be frustrated by the local people. Innovative systems that are effective at stopping the movement of fresh wood into the Victoria Falls urban area from neighbouring communal areas need to be developed and put into place. This could be in conjunction with imparting skills to carvers to improve their recovery rates

and utilisation efficiency in processing wood, that is, providing them access to knowledge and technology.

Thirdly, developing the marketing system, possibly with the participation of the local government structures is required. This should aim at marketing the carvings more widely, and increasing their value. There is need to conduct an economic analysis of the various uses of species in the carving industry in order to recommend the most viable options. There is need to compare and contrast the furniture and wood carving industries with a view to analyzing which of them realises the most economic returns to labour and woody resources.

Lastly, it is evident that the number of people going into the woodcraft industry has increasing between 1995 and 2006. If the national economic situation does not improve the trend is set to continue. The industry needs support given the use of otherwise unutilised species like *S. rautanenii*, *C. imberbe*, *K. acuminata* and *D. melanoxylon*, or the possible use of parts of trees discarded by the furniture industry.

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