Preliminary Report of the 2023 Economic Census

Presenter:

Kuda Chiguma

Outline

- Introduction
- Methodology (Mapping and Listing)
- Findings
- Gross Domestic Product

Introduction

a) Zimbabwe's economy is characterized by both formal and informal sectors, spanning across all industries, and contributing to Gross Domestic Product.

b) Although the informal sector is increasingly becoming a significant source of livelihoods, its contribution to government revenue remains minimal due to non-compliance with the formal tax system.

c) In a bid to understand the structure and size of the economy, ZIMSTAT conducted the first ever Economic Census in Zimbabwe from June 2024 –March 2025.

d) The census was conducted in 2 main phases namely, mapping and listing.

Objectives

o **The main objectives of conducting Economic Census (EC) were to:**

a) Come up with comprehensive baseline statistics on the size and structure of the country's economy.

b) Provide statistics that will enable the government, private sector, research institutions, academia and other stakeholders understand the economic landscape of the country, thereby facilitating evidence-based policy formulation, decision-making and strategic planning.

c) Facilitate evaluation of various developmental policies and programmes including the National Development Strategy 1 (NDS1), Africa Agenda 2063 and SDGs

Objectives (Cont.)

d) Provide insights into the geographical spread of economic activities and establishments in the country while providing key information for use in :

- Developing a comprehensive Statistical Business Register (SBR), which serves as a sampling frame for establishment based surveys.

- Compilation of Supply and Use Tables, Input-Output ratios and Social Accounting Matrix required for national income accounting

- Updating weights used in the compilation of various economic indices.

COVERAGE

○ The Economic Census covered all establishments operating in Zimbabwe, except those engaged in the following:

    a) Agriculture, forestry and fishing activities

    b) Public administration and defence, Compulsory social security activities

    c) Activities of households as employers; undifferentiated goods and services producing activities of households for own use, and

    d) Activities of extraterritorial organizations and bodies.

○ The unit of inquiry was either the establishment or the owner/proprietor of a business unit located at a fixed area.

Classification of Establishments

Economic activities were classified using International Standard Industrial Classification of All Economic Activities (ISIC), Revision 4, for example,

a) Manufacturing

b) Mining and quarrying

c) Financial and Insurance activities

d) Accommodation and food services, etc

Reference Period

❖The reference period for the EC was the 2023 calendar year.

a) During the census, data for turnover was provided per month and it was aggregated to get the annual average for 2023.

b) For establishments that started operating in 2024, data pertaining to that year was collected.

Definition of terms

a) *Enumeration Area (EA)* is a well identified territorial unit containing the prescribed population size in which enumeration is to be carried out by a single enumerator or a group of enumerators within a specified period of enumeration.

b) *Business Enumeration Areas (EAs)* are drawn from the mapping exercise and form the boundary of enumeration by a single or a group of enumerators within a specified period of operation for the purpose of the Economic Census.

Definition of terms

c) An establishment is defined as an enterprise or part of an enterprise which independently engages in one, or predominantly one, kind of economic activity at or from one location or within a geographical area, for which data are available, or can meaningfully be compiled, that allow the calculation of value added

d) A statistical unit is an entity for which information is sought and statistics are ultimately compiled

Definition of terms

e) A Structure is a free-standing building that can have one or more rooms, for residential, commercial or other use.

f) An enterprise is an institutional unit engaged in production. (An institutional unit may be defined as an economic entity that is capable in its own right of owning assets, incurring liabilities and engaging in economic activities and in transactions with other entities.) It is like a holding company. An enterprise might also be an establishment if it does not have any branches.

Economic Census Mapping and Listing Exercises

Presenter:

Fadzayi Ndlovu

MAPPING

Mapping Exercise

- The Economic Census Mapping fieldwork exercise was conducted from 8th July to 31st August 2024.

- The exercise involved the subdivision of the country into small geographic units called Business Enumeration Areas (BEAs).

  - Business Enumeration Area is a well-identified territorial unit containing the prescribed number of establishments in which enumeration is to be carried out by a single enumerator or a group of enumerators within a specified period of enumeration.

Mapping Exercise

The exercise served the following roles in the overall Economic Census operations:

a) Providing the framework (Business Enumeration Areas) which formed basis for enumeration.

b) Determining Census workload.

c) Procurement of census materials.

d) Informing overall planning of enumeration activities.

Objectives of Mapping

o **Specific objectives of the mapping exercise were:**

a) Determining the location of establishments prior to listing

b) Informing the recruitment, training and allocation of a sufficient number of census enumerators.

c) Constructing an establishment sampling frame.

Business Enumeration Areas

❖ A total of 8,139 Business Enumeration Areas were created from areas where establishments were concentrated such as :

      a)   Central Business Areas,

      b) Growth Points,

      c) Shopping centres and malls,

      d) Rural business centres,

      e) Industrial Areas and markets.

❖Coordinates were recorded for every establishment which was visited

LISTING
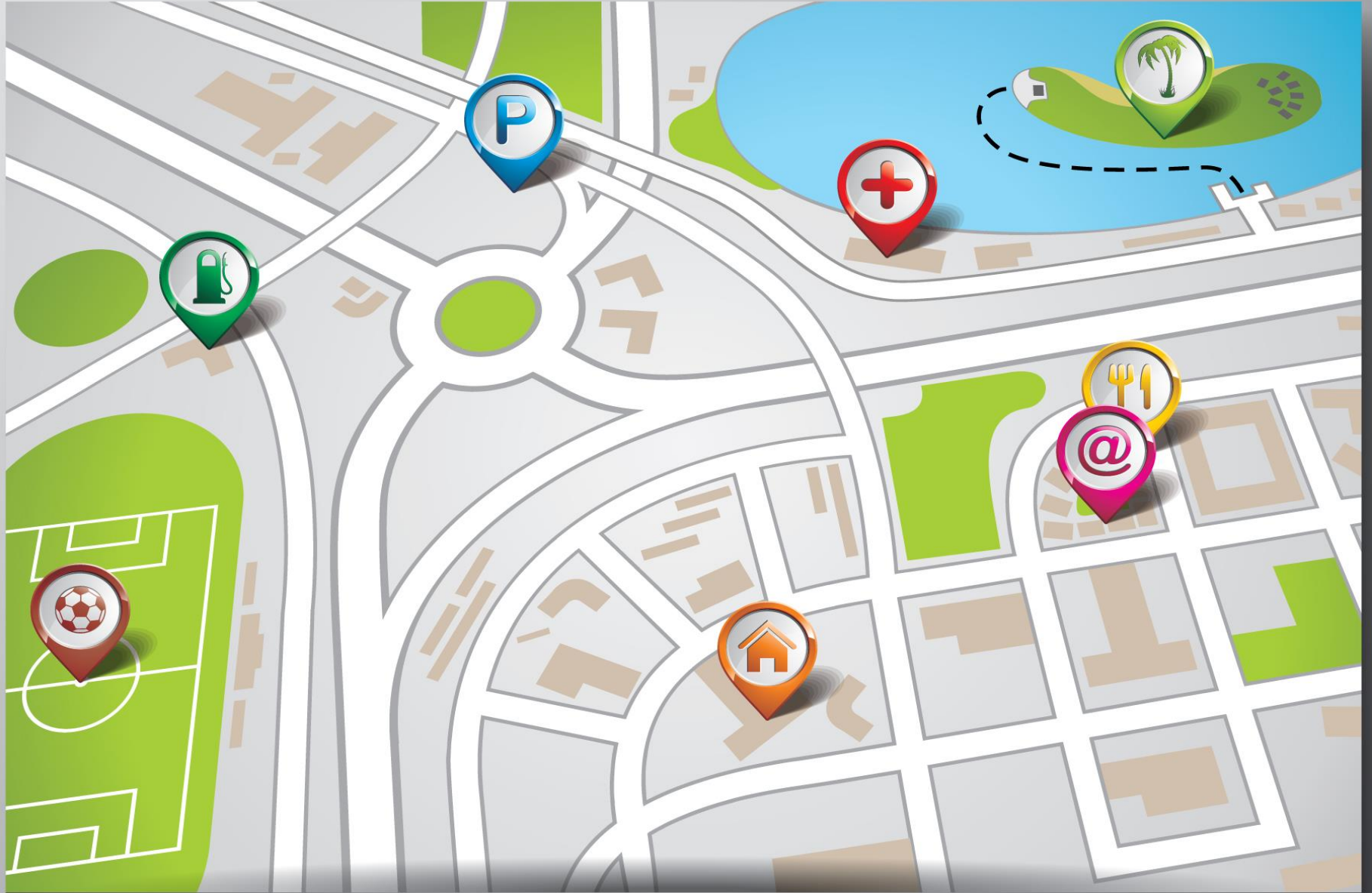
Listing Exercise

a) The listing exercise consisted of visiting all BEAs and listing all establishments soliciting information on establishment background, addresses, contact details, main economic activity and turnover among other variables.

b) The main purpose of the listing exercise was to create a Statistical Business Register (SBR) and collect data for relevant economic analyses.

c) The Statistical Business Register will be used as a frame for other future economic surveys.

Listing Exercise (Cont.)

❖ **Training and Field Work**

a) Economic Census Listing Training of Trainers was conducted in Masvingo from 21st to 26th August 2024.

b) Training of Enumerators (TOE) was conducted at 5 centres located in; Mutare, Bulawayo, Harare, Chinhoyi and Gweru from 1st – 8th September 2024.

c) Economic Census Listing field work covered the period 16th September 2024 to 31st March 2025

Key Findings of the 2023 Economic Census

Presenter:

Matiwonesa Phiri

Key Findings

Total Number of Establishments

204,798 Establishments

Informal — 76.1%

Formal — 23.9%
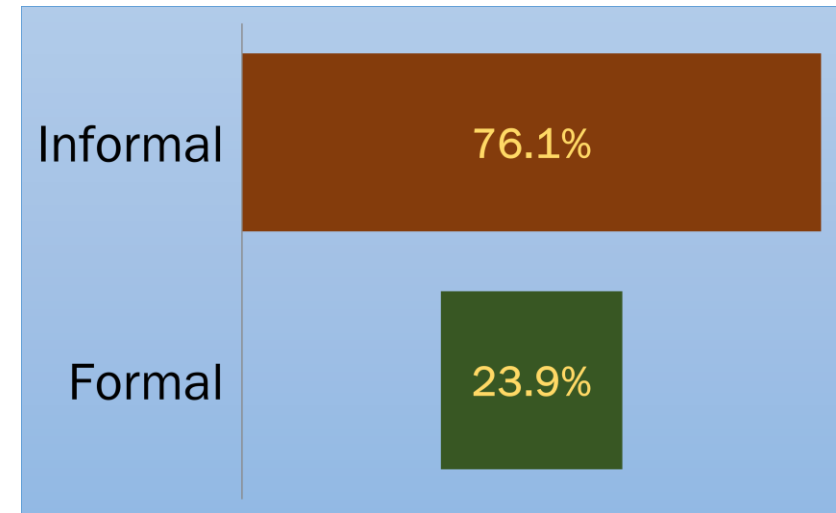
- A total of **204,798** establishments were found to be operational, of which the majority (**76.1%**) were informal.
- A formal establishment is one that is registered by the Registrar of Companies and Registrar of Cooperatives, ZIMRA and NSSA (provided they keep records.)

Establishments by Size

Total Establishments = **204,798**

Large

2,031
(1.0%)

Medium

1,298
(0.6%)

Small

21,396
(10.4%)

Micro

180,073
(87.9%)
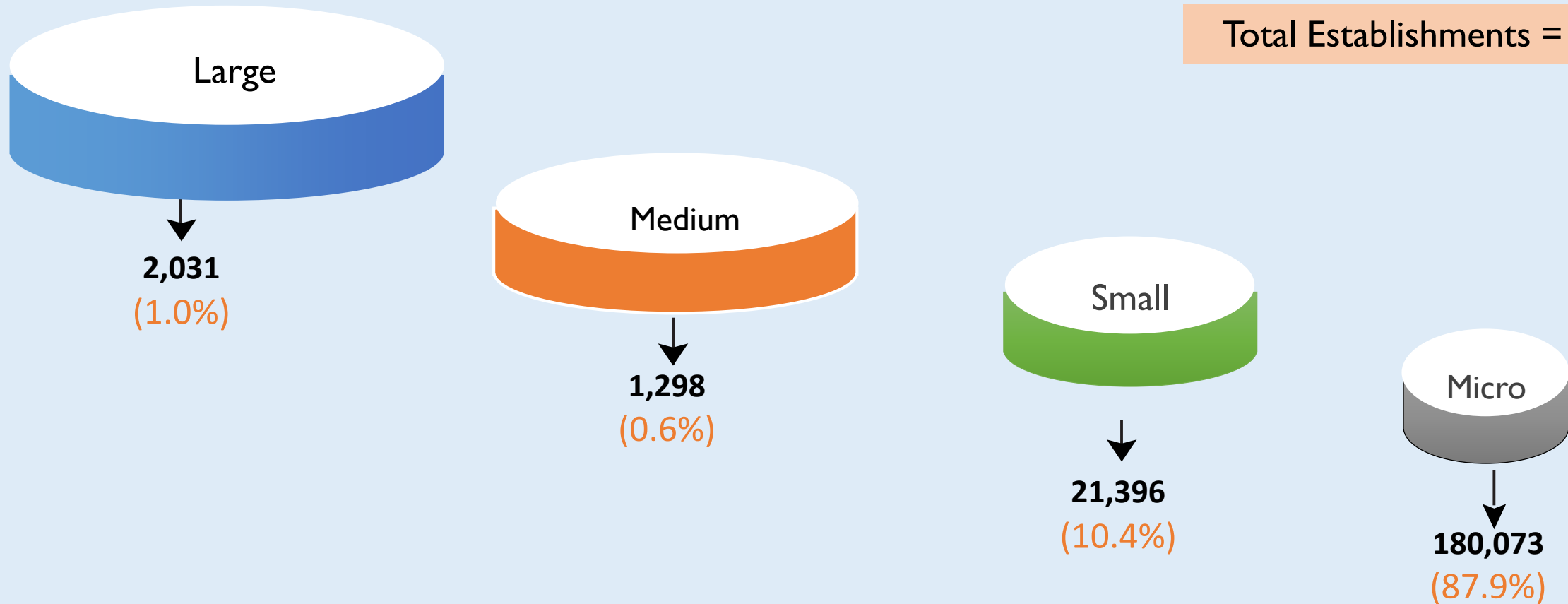
- o Overall, the largest proportion of establishments (**87.9%**), were micro.
- o Criteria for categorization was as given in the Micro, Small and Medium Enterprises Act.

Formal/Informal Establishments Classified by Size
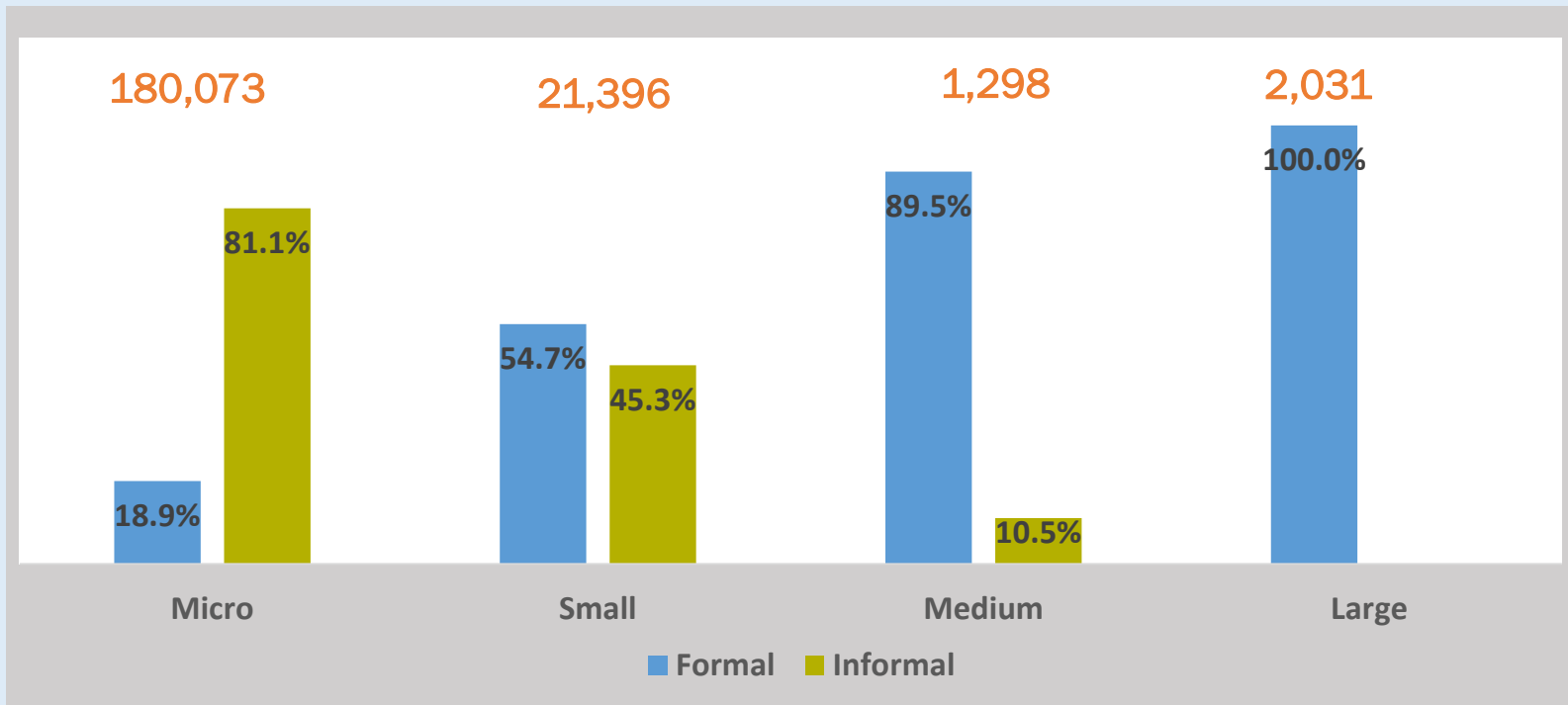
- All **2,031** large establishments (100%) were formal, while the majority of micro, small and medium establishments were informal
- **18.9 %** of the **180,073** micro establishments were formal

% Distribution of Establishments by Industry

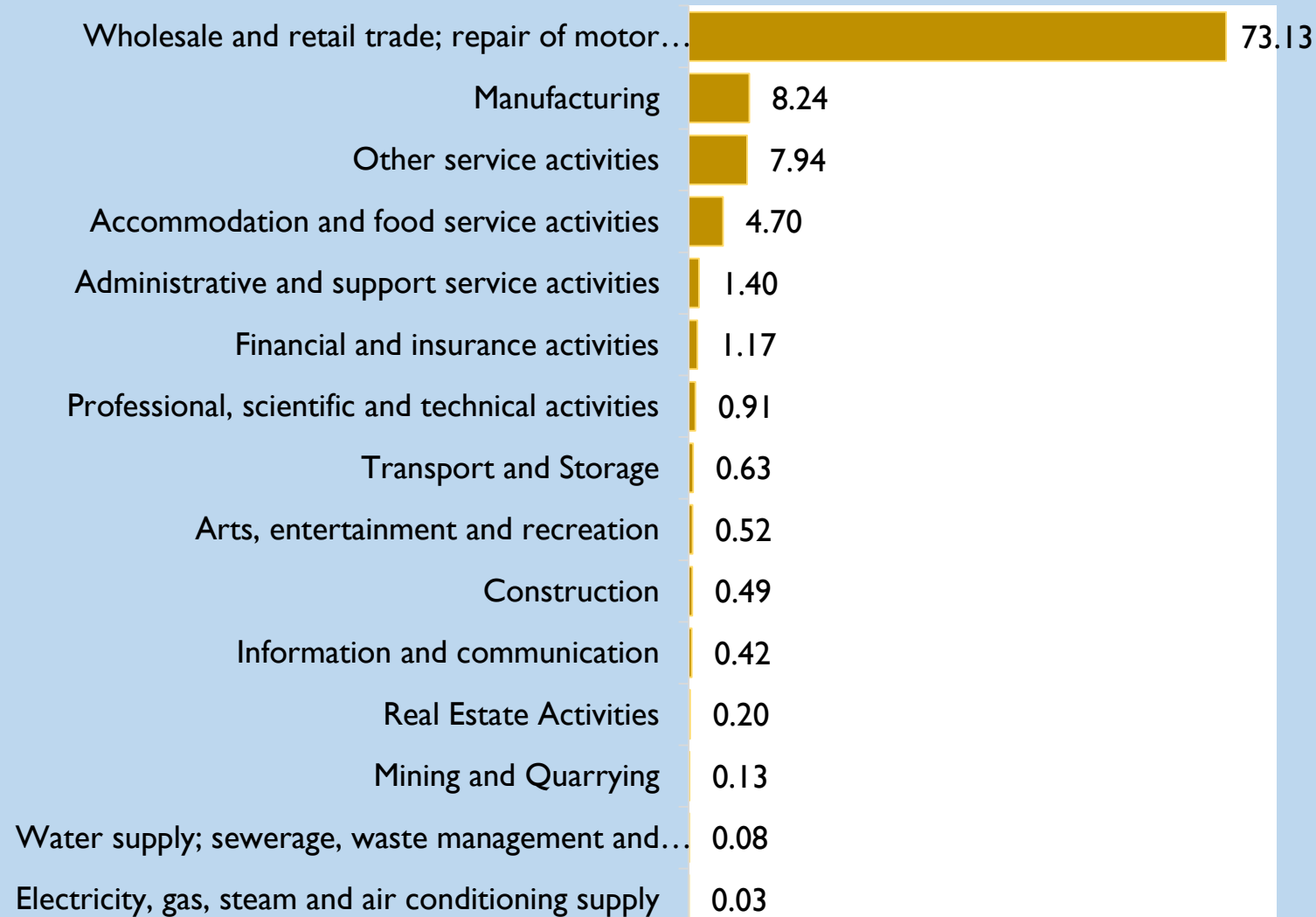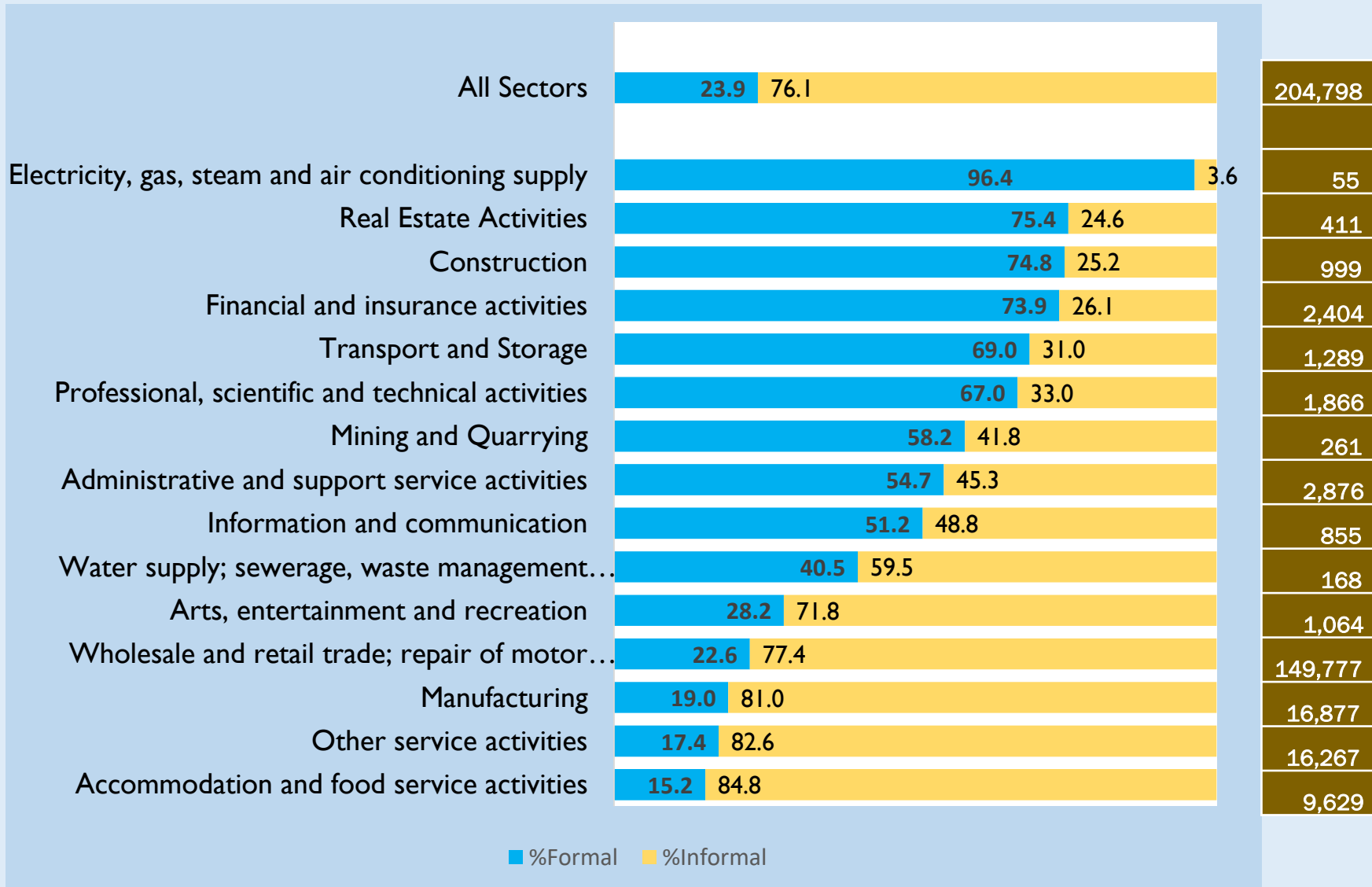| Industry	%
Wholesale and retail trade; repair of motor…	73.13
Manufacturing	8.24
Other service activities	7.94
Accommodation and food service activities	4.70
Administrative and support service activities	1.40
Financial and insurance activities	1.17
Professional, scientific and technical activities	0.91
Transport and Storage	0.63
Arts, entertainment and recreation	0.52
Construction	0.49
Information and communication	0.42
Real Estate Activities	0.20
Mining and Quarrying	0.13
Water supply; sewerage, waste management and…	0.08
Electricity, gas, steam and air conditioning supply	0.03

Establishments = **204,798**

Wholesale and retail trade constituted the highest proportion (73.13%) of establishments followed by the "Manufacturing" sector constituting (8.24%).

Formal and Informal Establishments by Province

Establishments

Province	%Formal	%Informal	Establishments
National	23.9	76.1	204,798
Bulawayo	40.4	59.6	15,840
Matabeleland North	37.7	62.3	4,337
Masvingo	24.5	75.5	15,215
Manicaland	24.3	75.7	17,958
Harare	23.8	76.2	83,267
Mashonaland West	22.5	77.5	17,047
Matabeleland South	20.5	79.5	7,812
Midlands	18.8	81.2	17,735
Mashonaland East	17.8	82.2	15,382
Mashonaland Central	13.9	86.1	10,205

■ %Formal ■ %Informal

- **40.4%** of the **15,840** establishments in Bulawayo province were formal.
- Most of the provinces recorded proportions of formal establishments that were less than thirty percent
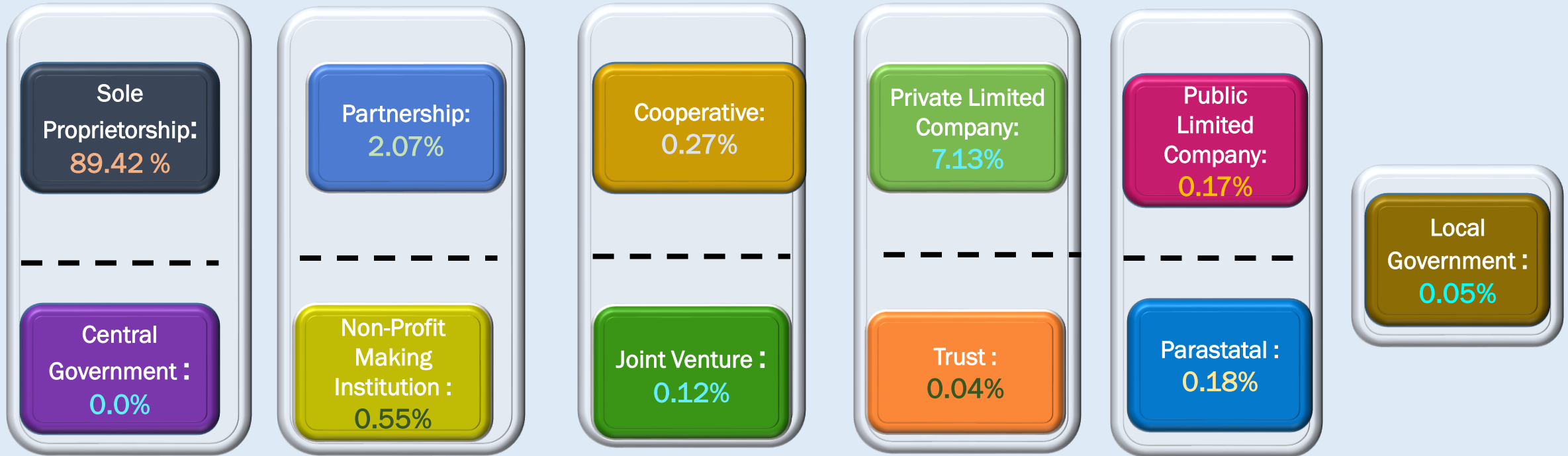
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Formal and Informal Establishments by Industry

Industry	%Formal	%Informal	Total
All Sectors	23.9	76.1	204,798
Electricity, gas, steam and air conditioning supply	96.4	3.6	55
Real Estate Activities	75.4	24.6	411
Construction	74.8	25.2	999
Financial and insurance activities	73.9	26.1	2,404
Transport and Storage	69.0	31.0	1,289
Professional, scientific and technical activities	67.0	33.0	1,866
Mining and Quarrying	58.2	41.8	261
Administrative and support service activities	54.7	45.3	2,876
Information and communication	51.2	48.8	855
Water supply; sewerage, waste management…	40.5	59.5	168
Arts, entertainment and recreation	28.2	71.8	1,064
Wholesale and retail trade; repair of motor…	22.6	77.4	149,777
Manufacturing	19.0	81.0	16,877
Other service activities	17.4	82.6	16,267
Accommodation and food service activities	15.2	84.8	9,629

■ %Formal   ■ %Informal

19.0% of the **16,877** establishments in the "Manufacturing" sector were formal.

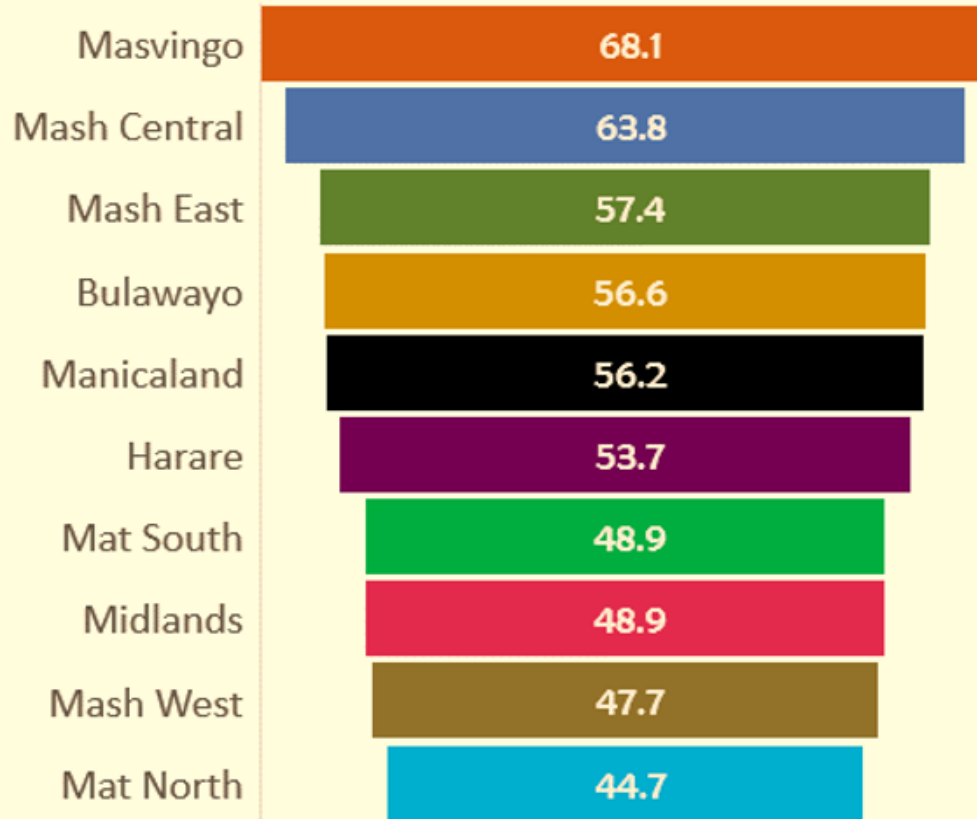28

% Distribution of Establishments by Type of Ownership

Establishments = 204,798

Sole Proprietorship: 89.42 %	**Partnership:** 2.07%	**Cooperative:** 0.27%	**Private Limited Company:** 7.13%	**Public Limited Company:** 0.17%	
Central Government : 0.0%	**Non-Profit Making Institution :** 0.55%	**Joint Venture :** 0.12%	**Trust :** 0.04%	**Parastatal :** 0.18%	**Local Government :** 0.05%

Of the 204,798 establishments at national level, 89.42% were Sole Proprietors, while 7.13% were Private Limited Companies.

Capacity Utilization by Province

Mining & Quarrying

Province	Value
Masvingo	68.1
Mash Central	63.8
Mash East	57.4
Bulawayo	56.6
Manicaland	56.2
Harare	53.7
Mat South	48.9
Midlands	48.9
Mash West	47.7
Mat North	44.7

Manufaturing

Province	Value
Manicaland	51.9
Mash Central	50.1
Harare	49.0
Mat South	47.0
Mat North	46.9
Masvingo	45.6
Bulawayo	42.8
Mash West	41.8
Mash East	41.6
Midlands	40.9

Capacity utilization for the Mining and Quarrying sector ranged from 44.7% in Matabeleland North to 68.1% in Masvingo
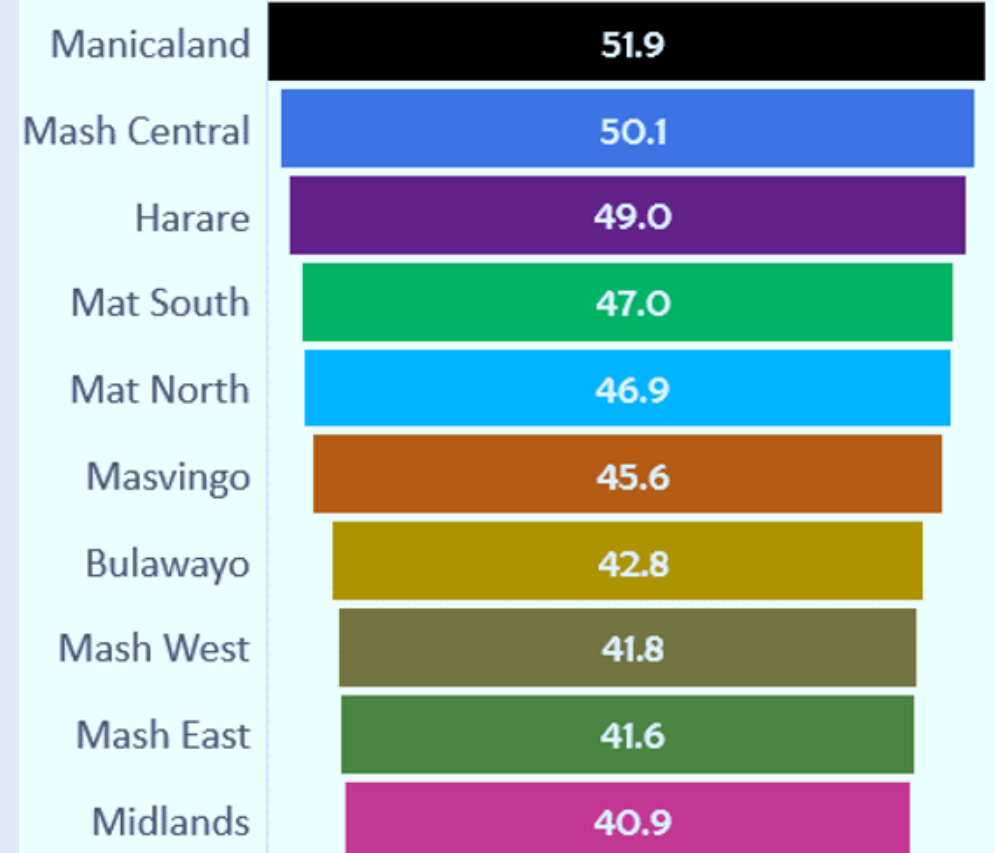
For the Manufacturing sector, capacity utilization ranged from 40.9% in Midlands to 51.9% in Manicaland

# Capacity Utilization by Size of Establishment

Capacity utilization in Mining and Quarrying Sector ranged from **45.5%** for Micro establishments to **60.9%** for the large
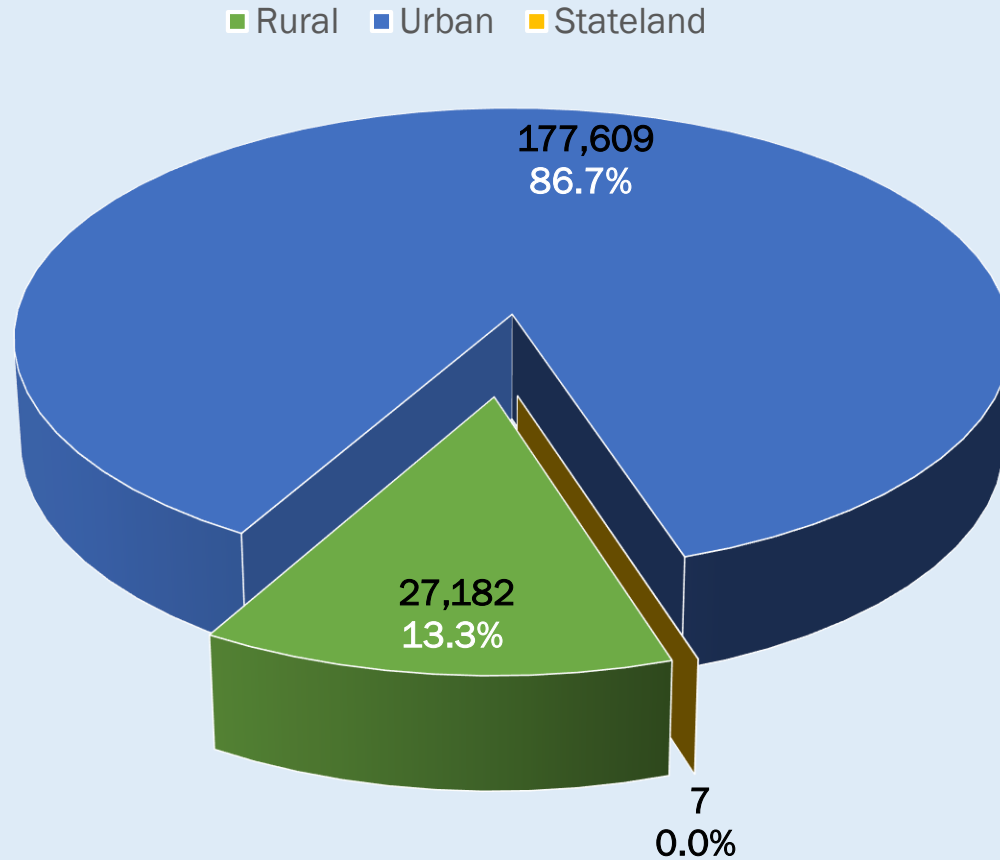
Mining & Quarrying

Micro
45.5 %

Small
51.3%

Medium
68.1%
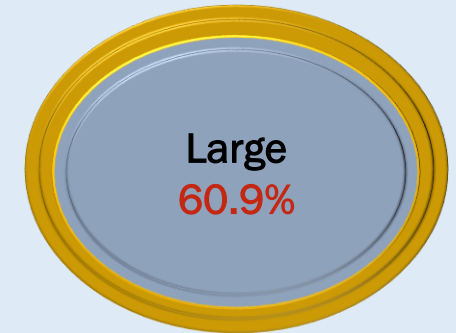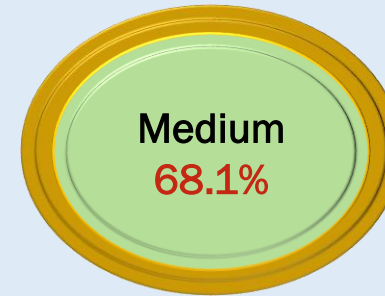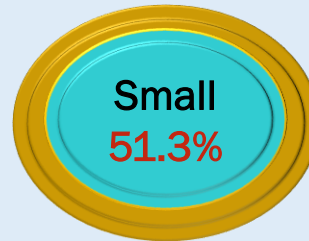
Large
60.9%

In the manufacturing sector, capacity utilization was **60.9%** for large establishments and **45.8%** for the micro

Manufacturing

Micro
45.8%

Small
55.2%

Medium
57.9%

Large
60.9%
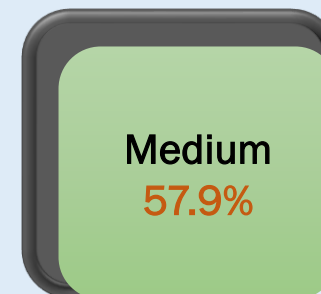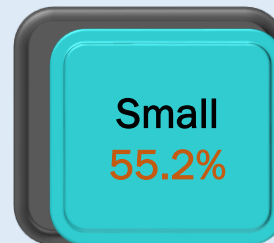
Establishment Location by Sector

- Rural
- Urban
- Stateland

177,609
86.7%

27,182
13.3%

7
0.0%

About 87% of establishments were located in urban areas, whilst 13.3% were rural

Registration Status by Province

Province	Registrar of Companies	Registrar of Cooperatives	ZIMRA	NSSA	Local Authority	Other	Establishments
Bulawayo	29.2	0.1	33.6	11.4	16.0	5.6	15,840
Manicaland	12.6	-	20.9	6.4	29.5	4.3	17,958
Mashonaland Central	8.4	-	8.3	2.0	35.0	3.7	10,205
Mashonaland East	12.1	0.0	12.6	3.4	28.3	3.3	15,382
Mashonaland West	14.3	-	17.4	5.0	29.7	3.9	17,047
Matabeleland North	20.3	-	29.4	10.0	32.5	3.9	4,337
Matabeleland South	11.5	0.1	14.6	4.5	52.2	4.5	7,812
Midlands	13.4	-	13.6	2.7	23.2	2.5	17,735
Masvingo	13.9	-	20.6	5.2	50.2	4.4	15,215
Harare	17.8	0.0	16.6	6.7	16.9	5.4	83,267
National	16.2	0.0	17.9	5.9	25.4	4.6	204,798

All provinces except Bulawayo (29.2%) and Matabeleland North (20.3%), had less than twenty percent of establishments registered with the registrar of companies

Registration Status by Economic Sector

Economic Sector	Registrar of Companies	Regsitrar of Cooperatives	ZIMRA	NSSA	Local Authority	Other	Establishments
Mining and Quarrying	55.6	-	45.2	34.1	31.0	26.4	261
Manufacturing	17.6	0.2	15.7	7.2	24.4	4.3	16,877
Electricity, gas, steam and air conditioning supply	50.9	-	89.1	78.2	54.5	25.5	55
Water supply; sewerage, waste management and remediation activities	25.6	-	35.7	28.6	17.9	10.1	168
Construction	73.3	0.1	66.3	32.6	30.8	16.7	999
Wholesale and retail trade; repair of motor vehicles and motorcycles	13.5	0.0	16.9	4.2	25.2	3.5	149,777
Transport and Storage	59.6	0.3	59.9	43.8	36.2	12.9	1,289
Accommodation and food service activities	10.4	0.0	12.4	6.5	26.7	7.3	9,629
Information and communication	39.9	-	44.4	24.4	32.5	12.2	855
Financial and insurance activities	61.6	0.0	62.8	39.0	50.9	22.5	2,404
Real Estate Activities	68.1	-	65.5	39.9	35.3	16.1	411
Professional, scientific and technical activities	50.2	0.1	56.8	33.0	26.0	20.5	1,866
Administrative and support service activities	51.7	0.0	40.7	18.5	34.1	10.3	2,876
Arts, entertainment and recreation	26.1	-	19.1	12.3	20.5	7.3	1,064
Other service activities	15.1	0.0	7.1	2.5	21.3	5.3	16,267
Grand Total	16.2	0.0	17.9	5.9	25.4	4.6	204,798

Less than twenty percent (17.6%) of establishments in the Manufacturing sector, were registered with the Registrar of Companies

ANNUAL GDP FIGURES FOR 2023

Presenter:

Clapton Munongerwa

Introduction

ZIMSTAT used data from the Economic Census and Administrative sources, to compile GDP.

Data from the Economic Census increased coverage and allowed incorporation of new data sources and emerging economic activities

The new data set was used to compute new 2023 GDP which was compared to the Old 2023 GDP.
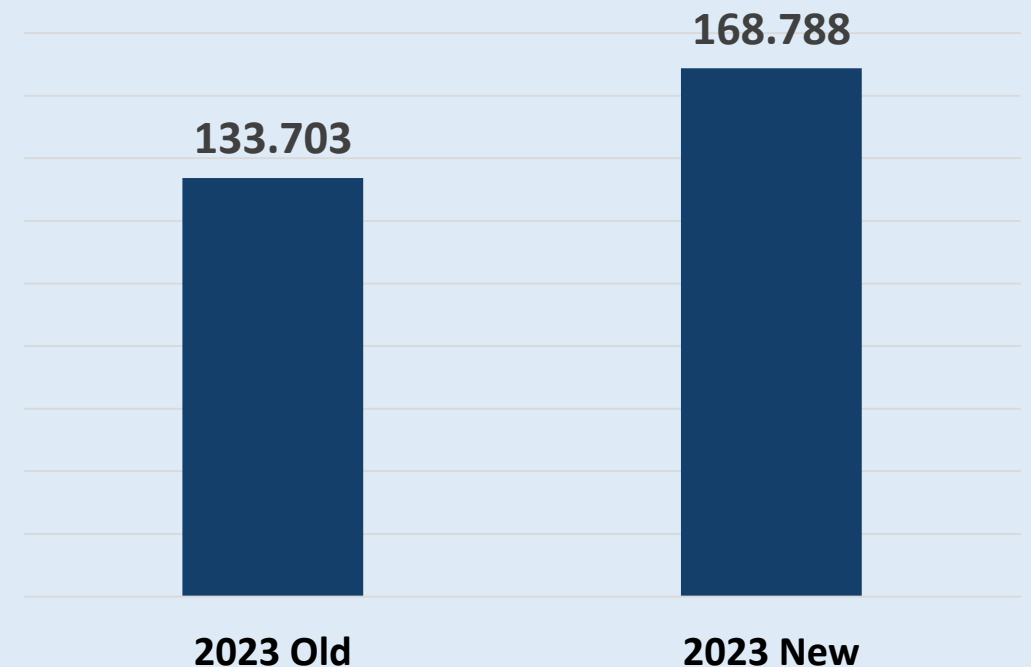
Consequently the base year was revised from 2019 to 2023.

GDP at Current Prices (ZWG Billions)

The 2023 GDP at current prices was converted from ZWL to ZWG using a cross rate to get **ZWG 67.6 Billion.**

GDP for 2023 at constant prices was estimated at **ZWG 67.6 billion since 2023 was the reference year.**
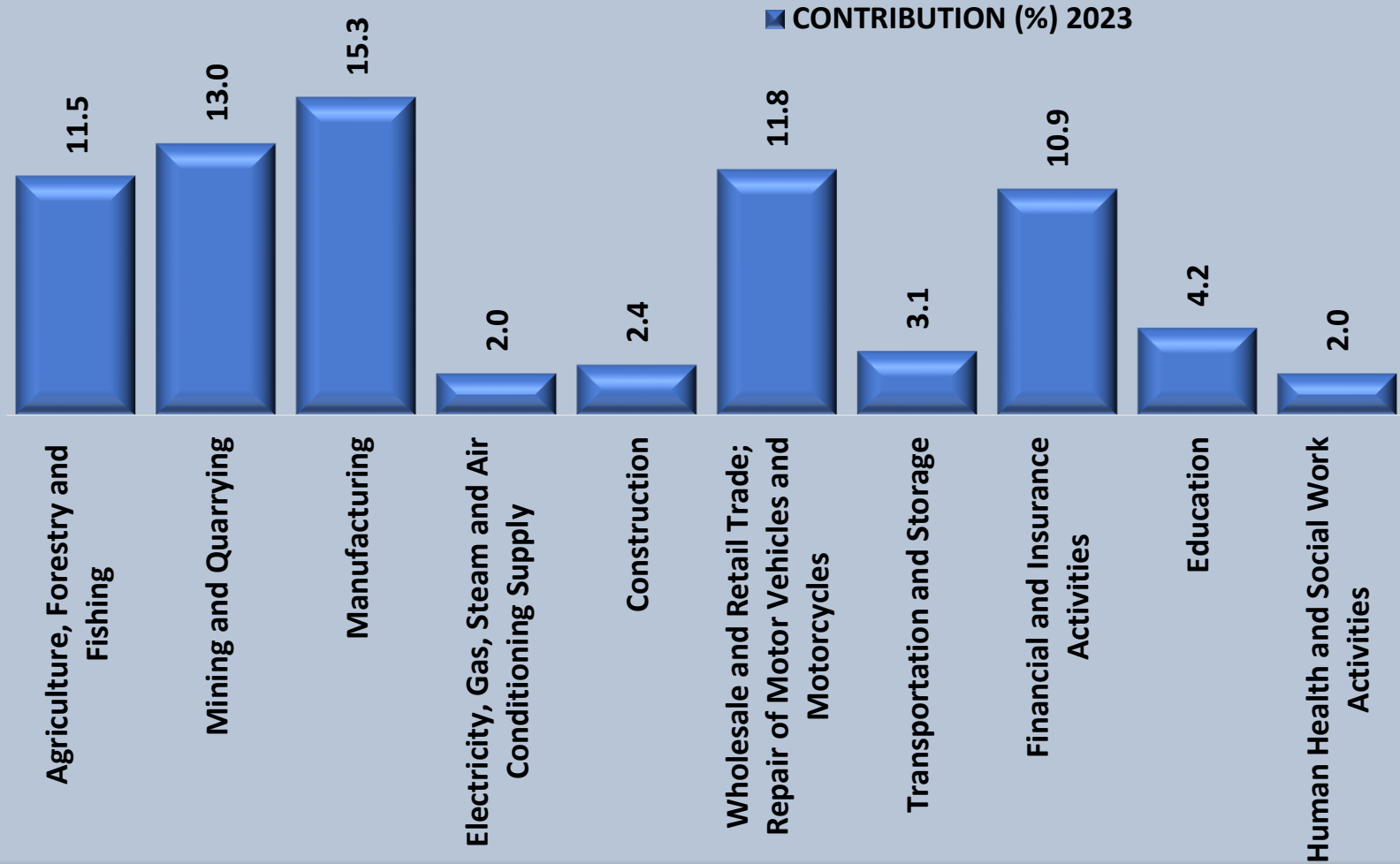
67.56

GDP at Market Prices

■ **2023**

2023 GDP CONTRIBUTION AT CURRENT PRICES

Major industries contributing to GDP in 2023 were:

- Manufacturing **15.3%**
- Mining & Quarrying, **13.0%**
- Wholesale and Retail, **11.8%**
- Agriculture, **11.5%**
- Finance and Insurance, **10.9%**
- Education, **4.2%**
- Transport and Storage, **3.1%**

CONTRIBUTION (%) 2023

Industry	Value
Agriculture, Forestry and Fishing	11.5
Mining and Quarrying	13.0
Manufacturing	15.3
Electricity, Gas, Steam and Air Conditioning Supply	2.0
Construction	2.4
Wholesale and Retail Trade; Repair of Motor Vehicles and Motorcycles	11.8
Transportation and Storage	3.1
Financial and Insurance Activities	10.9
Education	4.2
Human Health and Social Work Activities	2.0

2023 GDP At Current Prices by Income Approach (ZWG Billions)

In 2023, Compensation of employees was **ZWG 32.1 Billion.**

Gross operating surplus was estimated at **ZWG 20.8 Billion.**

Mixed Income was estimated at **ZWG 11.3 Billion.**

Net taxes on products were **ZWG 3.8 Billion.**

Components of Income	2023	Percent
Compensation of employees	32.1	47.5
Gross Operating Surplus	20.3	30.1
Mixed Income	11.3	16.7
Net taxes on products	3.8	5.7
GDP at market prices	**67.6**	**100.0**
Net primary income from abroad	- 0.662	-1.0
Gross National Income	**66.9**	**99.0**

Thank You