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INCLUSIVE GROWTH AND THE INFORMAL FOOD SECTOR IN WINDHOEK, NAMIBIA

INCLUSIVE GROWTH AND THE
INFORMAL FOOD SECTOR
IN WINDHOEK, NAMIBIA

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PREFACE

The food retail, distribution, and preparation sectors are a major component of urban informality in the Global South. The informal food economy comprises a dense and diverse network of informal markets, suppliers, transporters, mobile traders, hawkers, retailers, and street food vendors making food more accessible and affordable in low-income areas. The informal food sector is thus critical to the food security of poor urban households in rapidly growing towns and cities in the Global South. While the vibrancy of the sector is everywhere apparent, research on the structure, organization, dynamics, and impacts of informal food systems under conditions of hyper-urbanization has been limited. What is clear is that the informal food sector is both diverse and complex. By working in an interdisciplinary context with mixed methodologies and across different cities, the Hungry Cities Partnership (HCP) aims to add considerably to our understanding of common elements and differences across the Global South.

The informal food sector represents an “urban laboratory” for examining whether and how inclusive growth strategies can positively affect entrepreneurship and incomes, and help in alleviating poverty and mitigating the crisis of food insecurity. Fast-growing cities in Africa, Asia, Latin America, and the Caribbean are characterized by expanding degrees of informality. The definition of informality has been a source of debate since the 1970s. Broadly understood, informality has become the defining feature of the landscape, politics, and economy of the contemporary city in the South. As a result, efforts to secure livelihoods depend heavily on informalized activity. The Organization for Economic Cooperation and Development (OECD) has noted that “it would be misleading to address food security without taking into account a large part of the economy that provides jobs, incomes and essential services for the urban population. Despite its important role, the informal economy is still poorly defined, poorly measured and consequently poorly taken into account in food security policies” (Hitimana et al 2011: 1).

The literature on informal sector activity generally takes one of two positions. The first is a survivalist position, which suggests that unemployed individuals are pushed into the sector because they are desperate to provide for themselves and their dependants (Berner et al 2012). The corollary is that they will leave the sector as soon as formal job opportunities are available. A second, opportunistic, position is that informal sector vendors are motivated more by choice than necessity and see opportunities for economic and social advancement in the sector (Williams and Gurtoo 2012; Williams and Youssef 2014). An inclusive growth perspective asks how opportunists can maximize their outcomes and how survivalists can be supported to become more opportunistic (Knox et al

2019, Margolis 2014). As such, this perspective requires a focus on the enterprise rather than the individual and on entrepreneurship, innovation, and job creation. Studies of the informal sector suggest that opportunities and obstacles vary considerably by enterprise size, type, and location, as well as vendors' gender, migrant status, ethnicity, caste, and access to microfinance, markets, and support programmes.

National, regional, and municipal policies towards informality and informal entrepreneurship are highly variable (Young and Crush 2019). Policies towards the informal food economy span the spectrum from complete non-interventionism to draconian attempts to control and even eliminate informality. The pathologizing of the informal food sector is especially common at municipal level. Regulation through various legal and policy instruments is also a pervasive response to informality. If the informal food sector is to thrive, and provide opportunities for innovation and entrepreneurship, then an enabling policy environment is essential. The survey results presented and discussed in this report add significantly to the evidence base on which supportive policies can be constructed.

1. INTRODUCTION

This report presents the results of the first comprehensive survey of Windhoek's rapidly-growing informal food sector. As such, it aims to shed light on the food system of Windhoek, Namibia's capital and largest urban centre. The report is part of a research programme on food security in cities of the Global South by AFSUN and the Hungry Cities Partnership (HCP) and builds on earlier publications on Windhoek's food system including:

- The State of Food Insecurity in Windhoek, Namibia (Pendleton et al 2012);
- The Supermarket Revolution and Food Security in Namibia (Nickanor et al 2017);
- Urban Informal Food Deserts in Windhoek, Namibia (Nickanor et al 2018);
- Supermarkets and Informal Food Vendors in Windhoek, Namibia (Nickanor et al 2019); and
- Containing the Informal Food Sector in Windhoek, Namibia (Kazembe et al 2019).

To date, most studies of the informal food sector in Namibia have relied on national surveys, in-depth interviews with a small sample of food vendors or indirect information on patronage of the informal food sector in household food security surveys. The latest HCP household survey showed that the informal food sector had expanded dramatically over the last decade and that around two-thirds of Windhoek households obtained some of their food from informal vendors (Nickanor et al 2017). Rates and frequency of food sourcing from the informal sector were especially high in the city's large informal settlements (Nickanor et al 2019). For example, nearly 60% of surveyed households in informal settlements regularly patronize informal vendors operating in the city's open markets. Just over one-quarter buy food from informal street vendors and 14% from informal tuck shops (sometimes called spazas) (Nickanor et al 2019). However, this is the first representative in-depth survey of food vendors themselves. A total of 470 vendors were interviewed for the study by researchers from the Department of Population and Statistics at the University of Namibia using the common HCP informal vendor survey instrument.

2. METHODOLOGY

A spatial mapping of all food vendors across the city was carried out over a three-day period in October 2019. The aim was to compile a complete inventory of all of the different types of informal food vendor, their spatial distribution and density, and to create a population from which a representative sample could be

drawn. In total, 2,421 food vendors were mapped. Of these, the most common type was street vendors. Windhoek also has two types of market space in which informal vendors operate: (a) open markets (fenced off with one entrance) which are formal structures with services such as water, electricity and toilets built by the City and where vendors can rent stands (Kazembe et al 2019); and (b) informal markets that consist of clusters of vendors on public land who are given legal status and allowed to operate by the City. A total of 613 vendors were recorded in the city's open and informal markets. A smaller number of vendors (59 in all) have set up operations outside the entrance to the open markets, a source of tension with those on the inside.

The formal food system of Windhoek is dominated by supermarket chains (one local and five South African) but operates in a symbiotic relationship with informal food vendors (Nickanor et al 2019). One aspect of this is that some informal vendors locate outside or in proximity to supermarkets, specifically to tap their customer base. The mapping exercise located 174 vendors across the city engaged in this selling strategy. Other types of vendors included nearly 350 vendors selling from their place of residence, 37 selling cooked food to construction workers on construction sites, and 73 mobile vendors mostly selling fish and other produce door-to-door.

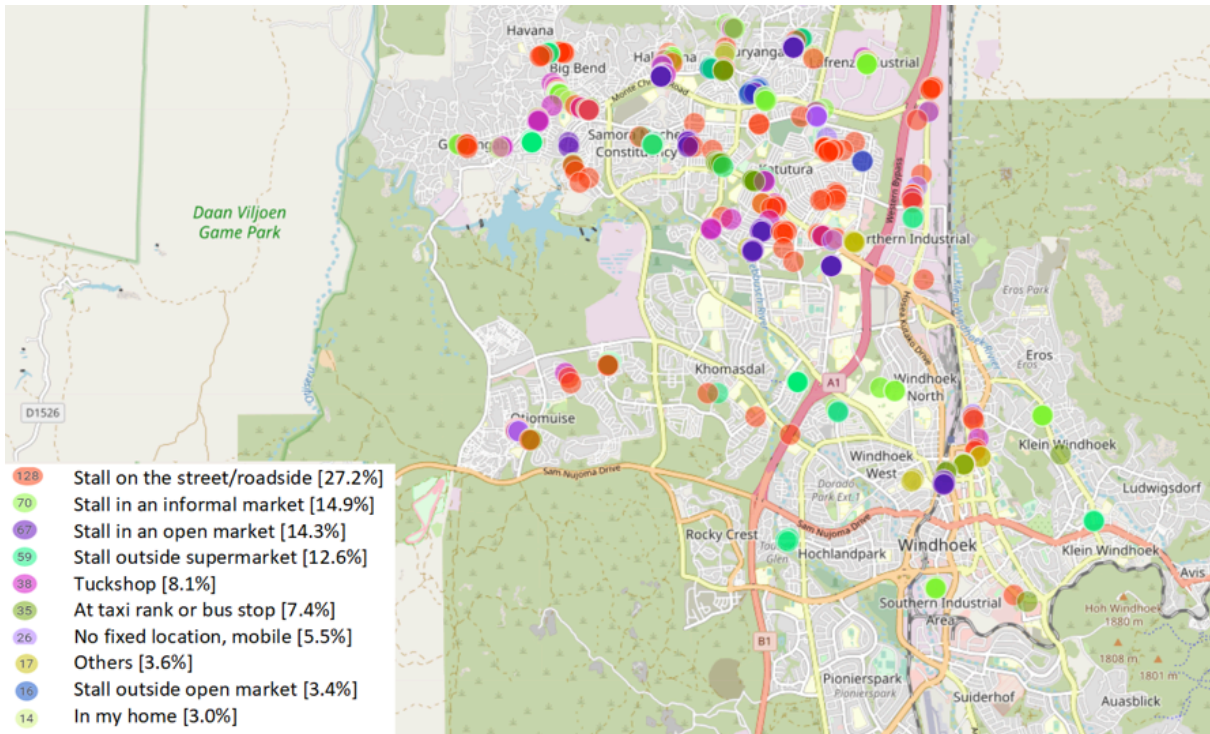
The spatial distribution of informal food vendors is uneven across the city. There is a heavy concentration of vendors in the northern half of the city (the site of low-income and informal neighbourhoods), a cluster in the downtown area and only a smattering in the middle and high-income southern half. Based on the mapping at the first stage, a sample for interviews was selected based on proportional stratified sampling. A tablet-based questionnaire was used to collect the data with the owner of the sampled enterprise targeted. Where the owner was absent, the unit was replaced with the closest unit of the same type. The questionnaire collected information on issues including the background characteristics of the vendor, the reason the business was started, the year it was started, the business location, type of food sold, food safety and sanitation, food storage, and employment capacity. It also investigated the characteristics of employees, vendor business practices, source of capital, food production, interactions with the formal food sector, and business aspirations.

Table 1 shows the number and types of vending enterprise sampled in the survey. Street vendors were most prominent, while roughly equal numbers of open market and informal market vendors were interviewed. Smaller numbers of other types were interviewed but the sampling ensured broad coverage of all of the major types of food vending in the city. Figure 2 shows the spatial distribution of the informal food businesses surveyed by type.

TABLE 1: Typology of Informal Food Vendors Surveyed in Windhoek

Type	No. surveyed	% of sample
Street vendors	128	27.2
Informal market vendors	70	14.9
Open market vendors	67	14.3
Vendors outside supermarkets	59	12.6
Tuck shops	39	8.3
Mobile vendors	26	5.5
Home shops	21	4.5
Vendors outside open markets	16	3.4
Vendors at taxi rank/bus stop	35	7.4
Other	9	1.9
Total	470	100.0

FIGURE 1: Spatial Distribution of Surveyed Vendors by Type

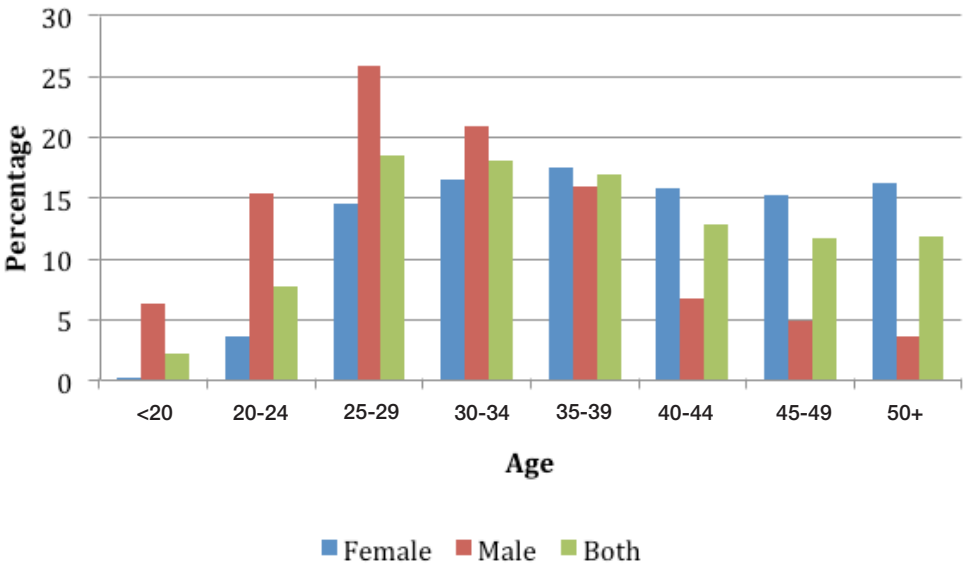


3. INFORMAL FOOD VENDOR PROFILE

3.1 Demographic Profile

In keeping with broader trends in the informal sector in Africa and globally, two-thirds of the Windhoek food vendors were women (Bonnet et al 2019). Three-quarters of the vendors were single and of the 25% who were married most were women. The male vendors were on average younger (31 years old) than the women (39 years old). The age range also varied with nearly 50% of male vendors qualifying as “youth” (under the age of 35) compared to only 29% of female vendors. Only 18% of men were over the age of 40 compared to nearly 40% of women. In summary, women of all ages tend to be involved in informal food vending while male vendors are generally a younger cohort (Figure 2).

FIGURE 2: Age of Female and Male Informal Food Vendors



In many African cities, informal food vendors tend to have low levels of education and are working in the informal sector because they lack the qualifications and experience to access the formal labour market. In Maputo, Mozambique, for example, only 7% of food vendors had completed high school and 1% had any tertiary education (Raimundo et al 2020). In Cape Town, where the education profile was boosted by the inclusion of refugees and migrants from other countries, the equivalent figures were 28% (high school) and 9% (tertiary) (Tawodzera and Crush 2018). In Windhoek, however, 45% of vendors had completed high school and 4% had some tertiary education which is testimony both to the better educational system in the country but also the fact that education does not guarantee a job in the formal sector. In general, younger vendors tended to be

better educated than older vendors (Figure 3). There is also a marked difference between male and female vendors with the latter showing much higher levels of educational attainment. As Table 2 shows, 31% of men but only 11% of women had no formal education. Similarly, 54% of women but only 27% of men had secondary education.

FIGURE 3: Education Level of Food Vendors by Age Group

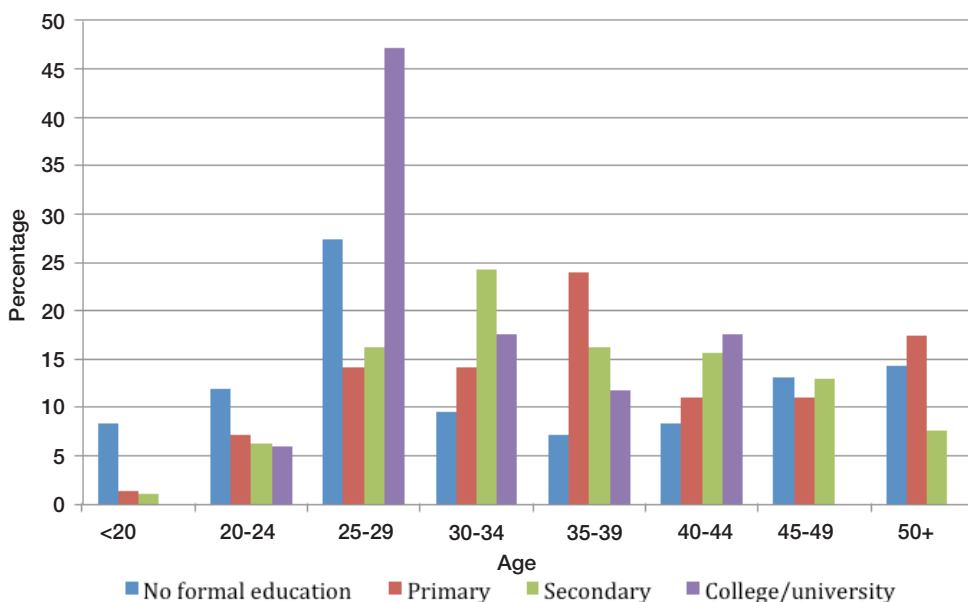


TABLE 2: Education Level of Female and Male Food Vendors

	Women (%)	Men (%)	Both (%)
No formal education	11.0	30.9	17.9
Primary	31.5	35.8	33.0
Secondary	54.2	26.5	44.7
College/university	2.6	5.6	3.6

3.2 Migration Status

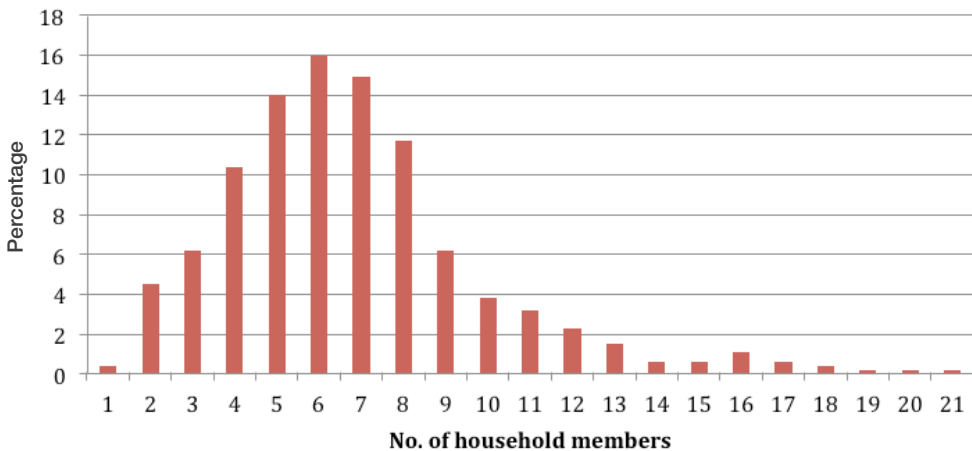
Nearly three-quarters (73%) of the informal food vendors surveyed were migrants born in the rural areas of Namibia (Table 3). About 7% were from other urban centres in the country and 9% were born outside the country. Only 11% were born in Windhoek. These findings confirm studies showing the importance of rural-urban migration in Namibia's rapid urbanization process and that the informal sector is dominated by migrants who cannot find formal employment in the mainstream (Nickanor 2013, Nickanor et al 2016, Nickanor et al 2019). More of the female vendors are rural-urban migrants (76% versus 68%) and more of the male vendors are from other countries (17% versus 6%).

TABLE 3: Migration Status of Food Vendors

Place of birth	Total		Female		Male	
	No.	%	No.	%	No.	%
A rural area in Namibia	341	72.7	232	75.6	109	67.7
Windhoek	51	11.0	33	10.7	18	11.2
Another country	44	9.5	17	5.5	27	16.8
Another city in Namibia	32	6.9	25	8.1	7	4.3
Total	468	100	307		161	

3.3 Household Size

Informal food vending enterprises are central to the vendors' households. Earnings from the business are often the only source of income for the vendor's household and are diverted to basic household needs. In addition, food purchased for the business is often consumed by household members. The HCP household survey in Windhoek found that 13% of households were wholly or partially reliant on informal sector income (Nickanor et al 2017). Figure 4 shows the size of the vendors' households in terms of the number of members. Very few vendors are from single or two-person households (less than 5%). Just over two-thirds had between four and eight household members with six being the most common (16%). The mean number of household members was six which suggests that most vendors support several dependants through their business operation.

FIGURE 4: Number of Vendor Household Members

The sector is made up of both men and women with and without prior job experience. An equal proportion of men and women (43%) had a previous occupation before starting their current business (Table 4). Of these, the women were slightly older with 74% being over the age of 35 compared to only 39% of the men. As many as 60% of the men with previous occupational experience were youth vendors under the age of 35.

TABLE 4: Age and Sex of Vendors with Previous Occupations

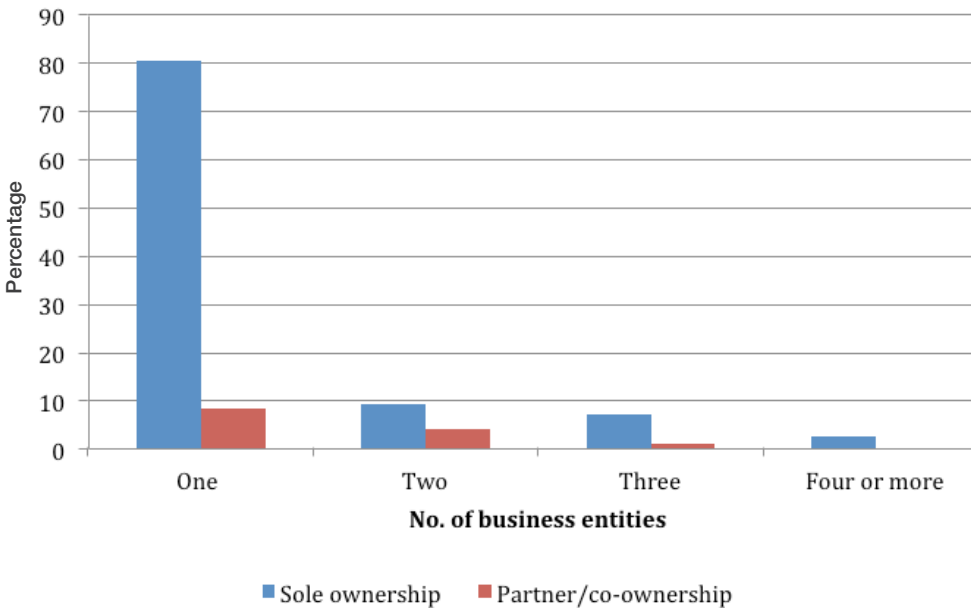
	Women		Men		Total	
	No.	%	No.	%	No.	%
<24 years	6	4.5	6	8.7	12	6.0
25-34 years	28	21.2	36	52.2	64	31.8
35-44 years	60	45.5	17	24.6	77	38.3
45+ years	38	28.8	10	14.5	48	23.9
Total	132	100	69	100	201	100

4. ESTABLISHING A FOOD VENDING ENTERPRISE

4.1 Ownership Structure

Most (80%) of the informal food enterprises were owned by a single proprietor (Figure 5). The other 20% were sole owners of two or more other businesses. Less than 10% of the vendors had a co-owner or partner. Only 14% of the vendors co-owned or were in partnership with others.

FIGURE 5: Number of Businesses Owned



4.2 Start-Up Timeline

Only 6% of the vendors had been in business since the 1990s. Another 18% had started up in the first decade of the century while three quarters had entered the sector in the last decade. As Figure 6 shows, the majority of informal food vendors in Windhoek are recent entrants to the trade. This is consistent both with the structural context of rapid urbanization, reduced opportunity to access jobs in the formal sector, and rapid expansion of the sector. Twenty years ago, Frayne (2001) described the city’s informal sector as very small, a picture that no longer pertains. Informal food vending has become a fast growing and highly competitive dimension of the city’s foodscape.

Figure 7 provides additional insights into the timeline for business start-up by showing year of establishment by business location. What this indicates is that vendors in all four locations (on the streets, in and around open markets, at informal markets and outside supermarkets) show a similar pattern of expansion over the last decade. The number in street vending has shown consistent annual expansion since 2012. Open market vending also experienced rapid expansion as more open markets were opened by the City. However, the number of start-ups in and around open markets has tailed off in recent years, presumably because of the finite supply of space and market stands. In contrast, the number of vendors at informal markets has continued to grow rapidly, a clear sign of the growth of these city-sanctioned trading sites.

FIGURE 6: Start Year of Food Vending Enterprise

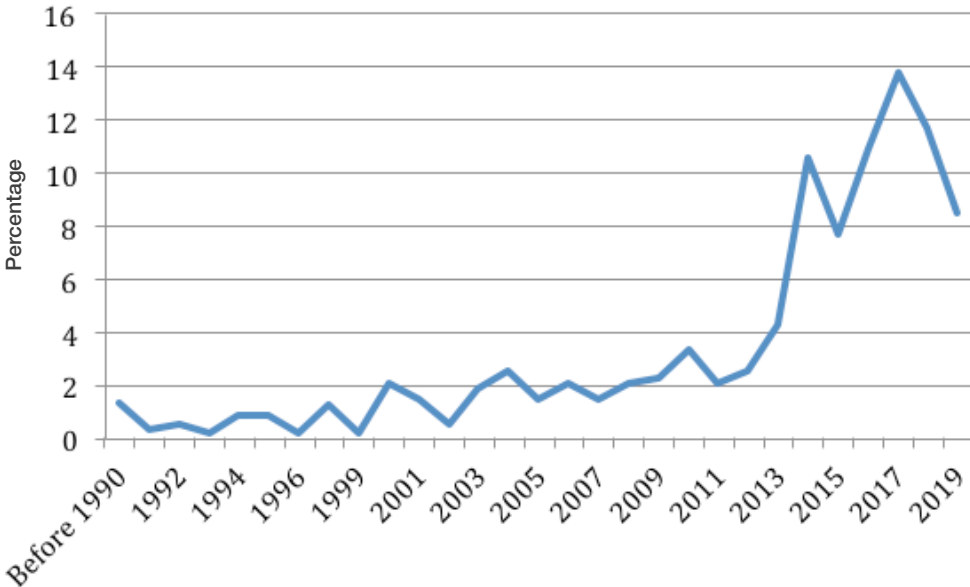
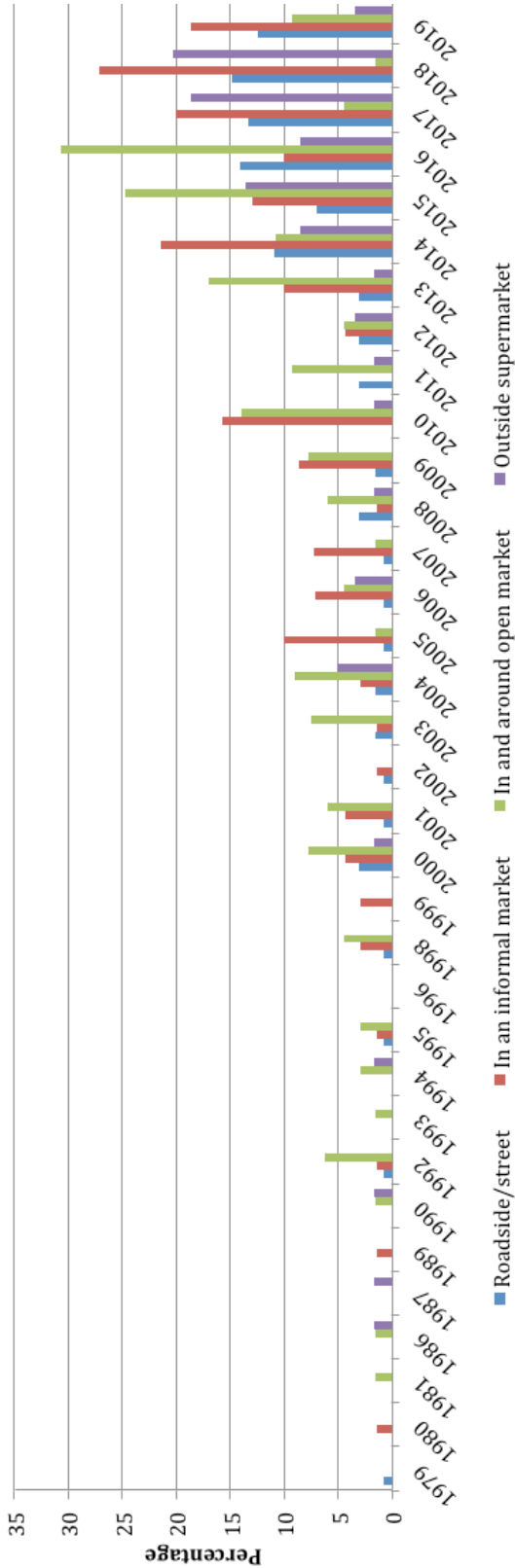


FIGURE 7: Start Year by Location of Enterprise



4.3 Rationale for Food Vending

Respondents were presented with a set of 15 possible reasons for starting a food vending enterprise and asked to rate each one on a scale from 0 (no importance) to 5 (extremely important). The responses are shown in Figure 8 (where the three colours on the right side of the bars in the diagram – light blue, purple and green – show which factors were most important to the vendors). The most important reasons were all related to economic survival:

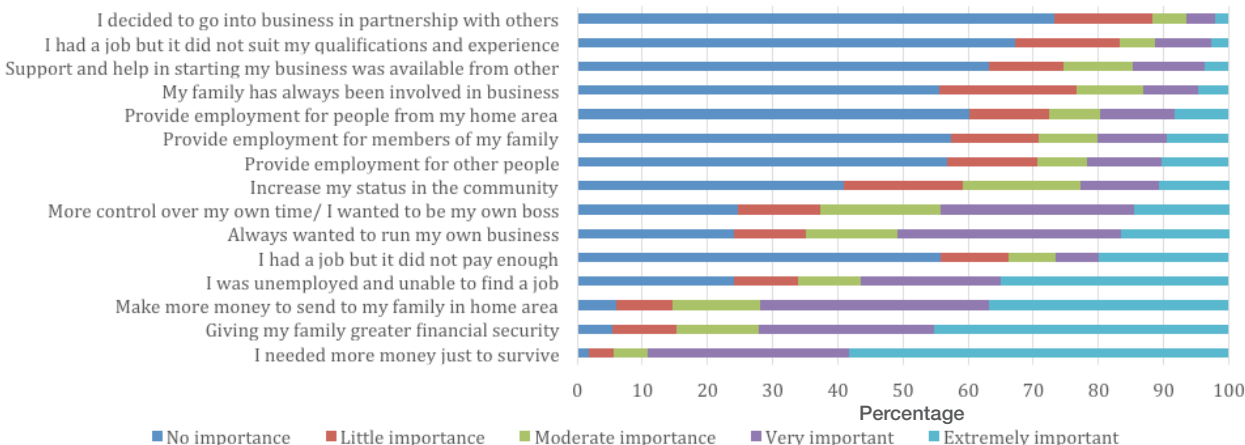
- Needing more money just to survive (59% extremely important, 31% very important and 5% moderately important for a total importance level of 95%);
- Wanting to give the family more financial security which clearly shows the link between business enterprise and household survival (45% extremely important, 27% very important and 13% moderately important for a total importance level of 85%);
- Wanting to make more money to remit to family in the home area which is consistent with the high proportion of migrants in the sector whose prime responsibility it is to support those left behind in the rural areas (37% extremely important, 35% very important and 13% moderately important for a total importance level of 85%); and
- Being unemployed and unable to find a formal sector job (35% extremely important, 22% very important and 10% moderately important for a total importance level of 67%).

Taken as a group, the high level of importance allotted to this combination of motives is a clear indication that for most of the vendors, the prime motives for participation in the sector are “survivalist” in nature but also that survival does not simply relate to the individual vendor or to their business, but also to the survival of their family/household members, both in Windhoek and those still living in the rural communities from which they come and with which they retain strong ties and feelings of obligation and responsibility.

A second cluster included more opportunistic or entrepreneurial motivations which were important to smaller numbers. These included:

- Always wanting to run their own business (overall importance level of 65%);
- Wanting more control over their own time and/or being their own boss (63%);
- Having a job that did not pay enough (34%);
- Wanting to provide jobs for others (30%); and
- Wanting to provide jobs for people from their home area (28%).

FIGURE 8: Motivation for Starting Informal Food Enterprise

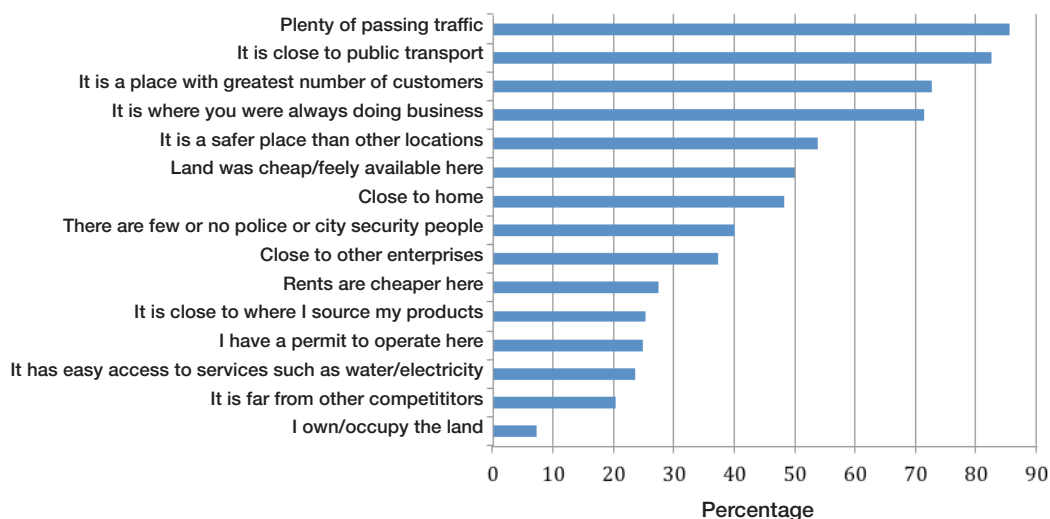


5. FEATURES OF INFORMAL FOOD ENTERPRISE

5.1 Choice of Operating Location

Over 80% of the vendors surveyed cited abundant passing traffic and proximity to public transport as the main factors in their choice of operating location (Figure 9). Approximately 70% indicated that their location delivered the greatest number of customers. A similar proportion said that their current location was where they had always conducted business which suggests that once established in a location, most vendors tend not to move. Around half of the vendors said other reasons influenced their choice of location including safety, proximity to home, and a location where the authorities would not confiscate their goods. This raises the question of why so many vendors fear confiscation and therefore what policies are being pursued to dissuade informal vendors from operating. As Kazembe et al (2019) show, confiscation is a main mechanism used by police to steer vendors away from some city streets. Half of the vendors noted that they chose a location where land was cheap or freely available. This raises the obvious question of how secure vendors are and what rents, if any, they pay to the city or to landowners.

As Table 5 shows, 47% of the food vendors said they were operating rent-free without permission, while another 11% said they had permission to operate with paying rent. Nearly 20% pay rent to the municipality which primarily takes the form of renting stands in the city-run open markets. Smaller numbers own or part-own the land on which they operate or share space with others. Only 5% pay rent to a private sector company or individual.

FIGURE 9: Reasons for Business Location

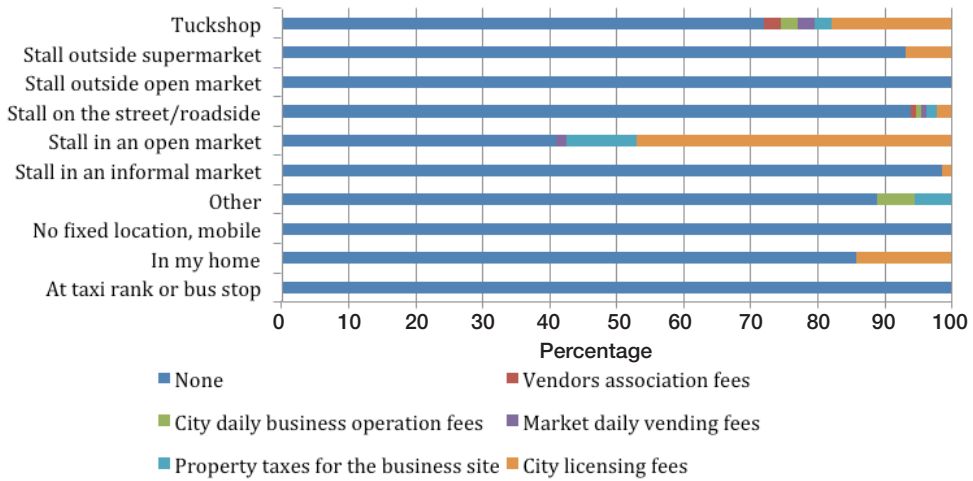
Note: Multiple-response question

TABLE 5: Ownership of Business Location

	No.	%
Rent-free, without permission (squatting)	221	47.0
Pay rent to council/municipality	80	17.0
Rent-free, with permission	53	11.3
I own the land/ am part owner	50	10.6
Share space/premises with others	30	6.4
Pay rent to private owner (company or individual)	24	5.1
Mobile vendor	11	2.3
Other (open space)	1	0.2
Total	470	100.0

While municipal regulations require licences to operate, over 85% of the informal food businesses had no licence and only 10% had paid licensing fees, which suggests that the City is unable to enforce a provision that is widely ignored. Location plays a major part in this. All informal food vendors operating from a taxi rank or bus stop, mobile vendors, and those with stalls outside open markets do not pay for any licence (Figure 10). Over 90% of those operating from stalls outside supermarkets, on the street/roadside and in an informal market also do not pay license fees. By contrast, two-thirds of the food vendors operating from a stall in open markets pay the city license fees required to access a stand. As Figure 10 shows, very few vendors (mainly tuck-shop vendors) pay fees to a vendor association.

FIGURE 10: Payment of Operating Fees by Vendors



5.2 Food Products Sold

A considerable variety of foods emerged when vendors were asked to identify their five best-selling products (Table 6). Overall, fresh produce in the form of vegetables (sold by 50% of vendors) and fruit (25% of vendors) were the most common. Of the cereal staples, the highest proportion were selling maize meal (11% of all vendors), with a few (5%) selling traditional *mahangu* (millet). As regards cooked food, pies/samosas/vetkoek (21%) and meat (19%) were most commonly on offer. Of processed food, sweet/chocolates (15%) and snacks/crisps/nik-naks (13%) were mostly sold. Frozen food was not commonly sold which is unsurprising since few have freezers on site.

The vendors obtain stock from a variety of sources (Table 7). Almost 60% purchase their stock from vendors in open markets for sale in other locations. We have argued elsewhere that there is a symbiotic relationship between the formal and informal food sectors in Windhoek vendors (Nickanor et al 2019), so it is noteworthy that close to half of all vendors buy stock from wholesalers and 41% buy from supermarkets. Also important are informal markets (37%) and small shops/retailers (25%). Home-made meals are also common (36%). Far fewer (only 16%) obtain their produce directly from farms. Overall, there was little seasonal variation in stock from any source—a clear indication that the informal food sector in Windhoek is not tied into or reliant on supply chains to rural producers within the country (Figure 11). Supermarket supplies in particular are available year-round, which also explains the regular use of these outlets for stocking up.

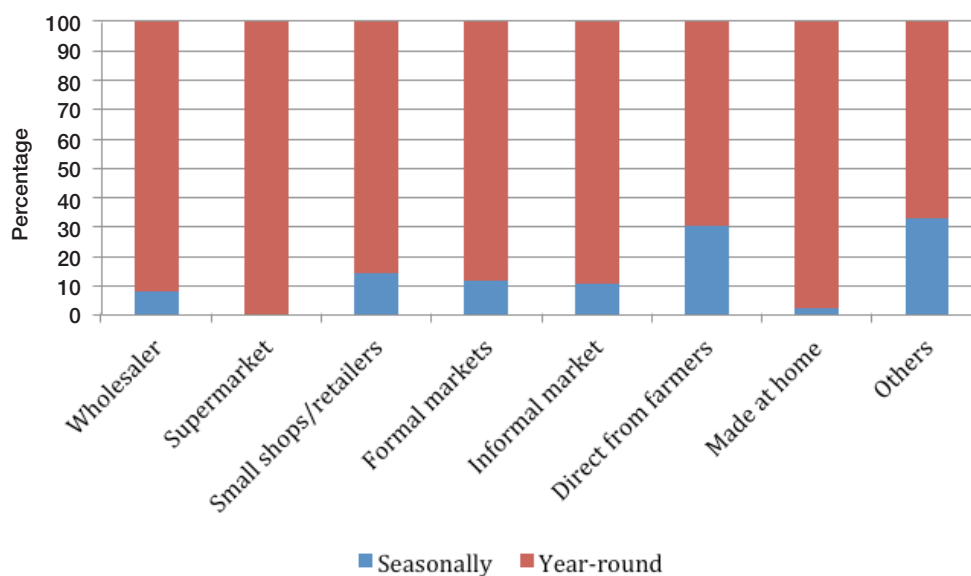
TABLE 6: List of Food Products Sold by Informal Vendors

Food type	No.	% of vendors
Cereal staples		
Maize meal	52	11.1
Bread	33	7.0
Mahangu	24	5.1
Pasta	19	4.0
Rice	11	2.3
Fresh produce		
Vegetables	237	50.4
Fruits	119	25.3
Potatoes	81	17.2
Red meat	79	16.8
Fresh fish	47	10.0
Eggs	34	7.2
Chicken	28	6.0
Kidney, livers, tripe, offal	10	2.1
Milk	6	1.3
Cooked food		
Pies/samosas/vetkoek	99	21.1
Meat	89	18.9
Chips	74	15.7
Vegetables	29	6.2
Chicken	7	1.5
Eggs	6	1.3
Frozen food		
Meat	15	3.2
Fish	2	0.4
Processed food		
Sweet/chocolates	71	15.1
Snacks/crisps/nik-naks	62	13.2
Cool drink	36	7.7
Sugar	10	2.1
Canned meat/wors	7	1.5
Powdered milk/omaere/sour milk	7	1.5
Canned fruit	5	1.1
Tea/coffee	5	1.1
Cooking oil	4	0.9
<i>Note: Multiple-response question</i>		

TABLE 7: Sources of Stock

	No.	% of vendors
Formal markets	280	59.6
Wholesaler	224	47.7
Supermarket	193	41.1
Informal market	173	36.8
Made at home	167	35.5
Small shops/retailers	119	25.3
Direct from farmers	76	16.2
Others	3	0.6

Note: Multiple-response question

FIGURE 11: Seasonality of Stock Supply

5.3 Financing the Enterprise

The informal food economy is generally characterized by a low level of capital investment. Table 8 shows that most Windhoek vendors' capital is sourced from personal savings (79%). In a few cases, social capital is important in the form of gifts and loans from relatives. Use of formal and informal lending institutions is minimal in the city. Support from the government or the NGO sector was non-existent. This means that Windhoek's informal food vendors are largely self-reliant in start-up and in running their enterprises. Only one respondent had financed the operation with a bank loan. Only five had applied for a bank loan with just two successful. Several reasons were given by the vendors for why they thought banks were reluctant to lend to informal traders (Table 9).

TABLE 8: Main Source of Finance

	No.	% of vendors
Personal savings	373	79.4
Money gift from a relative	41	8.7
Loan from relatives in Namibia	37	7.9
Loan from relatives in another country	5	1.1
Loan from an informal financial institution	3	0.6
Loan from non-relatives	3	0.6
Loan from a bank	1	0.2
Loan from a micro-finance institution	1	0.2
Money from usurers (money lenders)	1	0.2
Business credit (goods on terms)	1	0.2
Loan from religious institution	0	0.0
Loan from government agency	0	0.0
Loan from an NGO	0	0.0

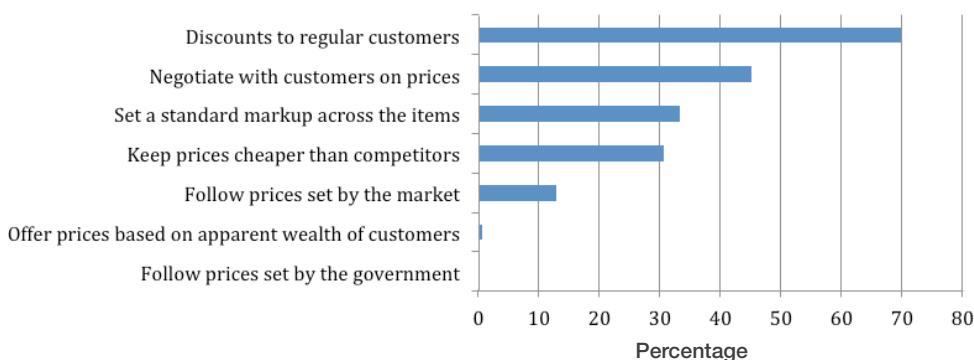
TABLE 9: Perceived Reasons for Difficulty in Obtaining Bank Loans

	No.	% of vendors
Because of insufficient guarantees/collateral	90	19.1
Banks think that the loan will not be repaid	90	19.1
Banks believe these enterprises are not viable	88	18.7
Only loan money to formal businesses	87	18.5
Because they have insufficient initial capital	53	11.3

5.4 Price-Setting

A distinguishing characteristic of informal food businesses is flexible pricing, even though their profit margins are generally low. While fixed prices prevail at certain times and places, it is more common to see price variation mostly because of competition. At the same time, only 30% of the vendors said that they deliberately keep their prices lower than those of their competitors, which presumes some degree of cooperation (Figure 12). More common is offering discounts to regular customers with 70% of vendors adopting this practice. Also, nearly half are prepared to negotiate prices with their customers.

Food price volatility can have severe impacts on the profit margins of informal traders. Table 10 shows the strategies informal food vendors employ to offset the impacts of volatility. The most common approach is to change the cost of the stocks they buy from suppliers (42%), followed by changing the amount of food stocked (31%), and passing price increases or decreases along to customers (27%).

FIGURE 12: Methods of Setting Prices

Note: Multiple-response question

TABLE 10: Strategies to Offset the Impact of Food Price Increases

	No.	% of vendors
Change the cost of the food bought from suppliers*	195	41.5
Change the amount of food stocked	144	30.6
Change the price of food sold	127	27.0
Change the availability of food sold	122	26.0
Change the amount of food stocked because of change in availability	94	20.0
Change the price of food stocked because of change in availability	78	16.6
Customers change their demand for some foods	61	13.0
Change the type of food stocked because of change in availability	57	12.1
Change the type of food stocked because of a change in the price of food bought	53	11.3
Change the amount of food stocked to suit customer demand	51	10.9
Change the price of food stocked to suit customer demand	48	10.2
Changed the type of food stocked to suit customer demand	27	5.7

*Buying other cheaper foods instead or by sourcing more cheaply from other suppliers
 Note: Multiple-response question

5.5 Customer Retention

Customer retention and repeat business provides a potentially important strategic advantage to vendors. Three-quarters of the vendors in the sample said that they had regular customers, but only one-third indicated that these customers would follow them if they moved. This suggests that customer loyalty is also related to where they choose to do their shopping and is not simply about personal loyalty. Two main strategies are used to retain customers: giving credit to regular customers (57%) and stocking food items sought by regular customers (22%). In general, the vendors' marketing strategy is based on relationships where retention and satisfaction of the customer is key (Roberts-Lombard 2009). As noted

by others, relationship marketing hinges on customer loyalty, quality of service, product-specific satisfaction and timeliness of delivery (Baranidharan 2012, Thatchinamoorthy and Meenambigal 2017).

5.6 Profit Maximization

As in any other business, informal food vendors employ different strategies to minimize costs and maximize income and profit. Figure 13 lists a range of strategies adopted by the Windhoek vendors. Offering food on credit again emerges as an important strategy for many, as is price-shopping for the cheapest available products. Other strategies deployed by over half the vendors included extending hours of operation and buying stock in bulk (although as individuals rather than in combination with others). In contrast to vendors in other cities studied by the Hungry Cities Partnership, and perhaps reflecting the level of education of vendors in Windhoek, over half keep business records. Nearly 30% use mobile phones to coordinate with suppliers and customers, again a relatively high proportion in comparison with other global South cities.

FIGURE 13: Profit Maximization Strategies



Note: Multiple-response question

5.7 Employment Creation

The informal sector is a major source of employment and self-employment in many cities in the Global South (Young and Crush 2019). The capacity of food vendors to generate employment for others, however, varies considerably from city to city. In Windhoek, over 90% of the vendors surveyed are single-person operations, which means that the informal food sector is not a particularly significant employment creator (Table 11). Of the remaining 35 vendors, 24 (5% of the total) had only one employee and only 11 had two or more employees.

In total, then, the 470 vendor enterprises created only 35 additional jobs. Thus, although 30% of the vendors said that creating employment for others was an important reason for operating a food business (Figure 8), in practice their ability to reach this goal appears limited.

TABLE 11: Employment Creation

No. of employees	No. of vendors	% of vendors
0	435	92.6
1	24	5.1
2	8	1.7
3	2	0.4
4	1	0.2

Informal Food Vendors in Windhoek



Open market entrance



Open market and supermarket



Vegetable vendor stall in open market



Cereal vendor in open market



Cooked meat vendors in open market



Vendors outside formal market



Informal market



Street vendors



Tuck shops



Home shop



Mobile vendor

6. BUSINESS AND OPERATING CHALLENGES

6.1 Types of Challenges

A central issue associated with informal trading is the relationship between operational challenges and entrepreneurial activity, as this impacts on the conditions that determine survival (Escandon-Barbosa et al 2019). In this study, the vendors were presented with a list of possible challenges and asked which, if any, they had experienced. (Table 12). The majority indicated that their primary business challenges were economic in nature, including not having enough customers (63%) not making enough sales (46%), and supplies being too expensive (43%). Interestingly, while 60% of the vendors offer credit to their customers, the fact that so many live in poverty explains why 40% said that customers not paying their debts was a significant business challenge. Thus, offering food on credit may boost custom but it puts the vendors in a vulnerable position when customers do not or cannot pay later on.

TABLE 12: Business Challenges Faced in Previous Year

	No.	% of vendors
Economic challenges		
Too few customers	294	62.6
Insufficient sales	215	45.7
Suppliers are charging too much	204	43.4
Customers not paying their debts	183	38.9
Too many competitors around here	168	35.7
Competition from supermarkets/large stores	30	6.4
Operational challenges		
Storage problems	130	27.7
Refrigeration problems/do not have a refrigerator	129	27.4
Restricted by lack of relevant training	53	11.3
Social challenges		
Verbal insults against your business	92	19.6
Crime/theft of goods/stock	34	7.2
Crime/theft of money/income	22	4.7
Conflict with Namibian vendors	18	3.8
Prejudice because of nationality or ethnicity	11	2.3
Conflict with vendors from other countries	8	1.7
Experienced physical attacks/assaults	7	1.5
Experienced arrest/detention of yourself/employees	3	0.6
Experienced prejudice because of your gender	3	0.6
<i>Note: Multiple-response question</i>		

Storage and refrigeration problems were cited as challenges by just under 30% of the vendors, but only 11% felt that they lacked sufficient training to operate a business. In contrast to cities such as Cape Town, South Africa, crime in the form of theft of goods and money is very much a minor issue, as are different forms of prejudice and conflict. Less than 1% of the vendors had been arrested by the authorities. However, the vendors were not questioned in detail on their other experiences with the authorities as the latter seek to control the spread of informal vending in parts of the city.

6.2 Supermarket Competition

The Southern African region has seen rapid expansion of the supermarket sector and supermarket domination of urban food systems (Crush and Frayne 2011, das Nair 2020). Namibia is no exception with an inrush of South African supermarket chains in the last two decades (Nickanor et al 2018). In many cities, the scale of expansion is such that it has a negative impact on informal food vendors (Battersby and Watson 2018, Skinner 2018). Based on a household survey and qualitative interviews with a selection of vendors, Nickanor et al (2019) suggest that in Windhoek, informal vendors and supermarkets have more of a symbiotic relationship. This survey provided an opportunity to further test this hypothesis with a representative sample of the city's vendors. As Table 13 shows, only 6% of the vendors said that competition from supermarkets represented an important business challenge. As many as 94% felt that supermarkets did not affect their business in any way. Supermarkets were not seen as competitors, as attracting their customers, or as affecting their food pricing strategies. Indeed, only 4% of vendors said that supermarkets targeted the same customers as they did. The survey therefore provides strong confirmation of the symbiosis hypothesis.

TABLE 13: Competition from Supermarkets

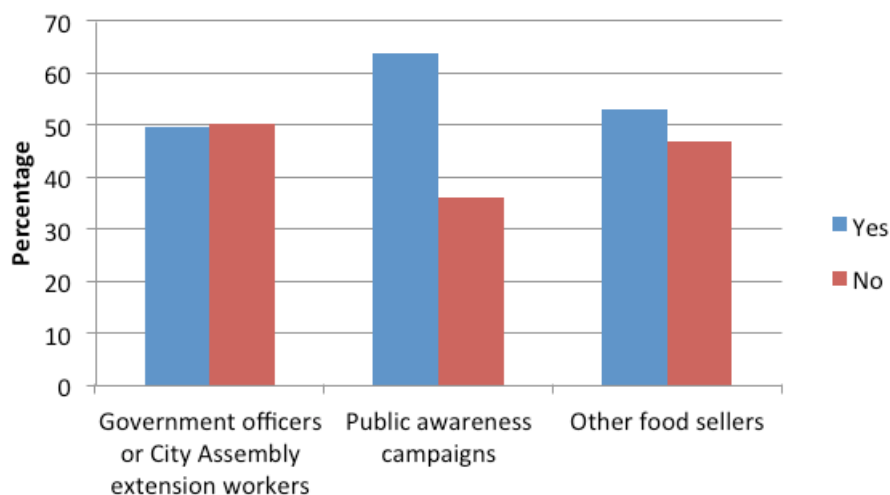
	Yes (%)	No (%)
Supermarkets affect your business in some way	6.0	94.0
Supermarkets are competitors with your business	4.3	95.7
Supermarkets attract customers away from your business	4.3	95.7
Supermarket prices cause you to change the price of the food you sell	3.8	96.2
Supermarkets target the same customers as your business	3.8	96.2
Supermarkets attract customers towards your business	3.0	97.0

6.3 Food Sanitation and Safety

A common concern about the informal food sector is the issue of food sanitation and safety (Lazaro et al 2019, Morse et al 2018, Roesel and Grace 2014). In many cases, city authorities use arguments about the lack of sanitation and public

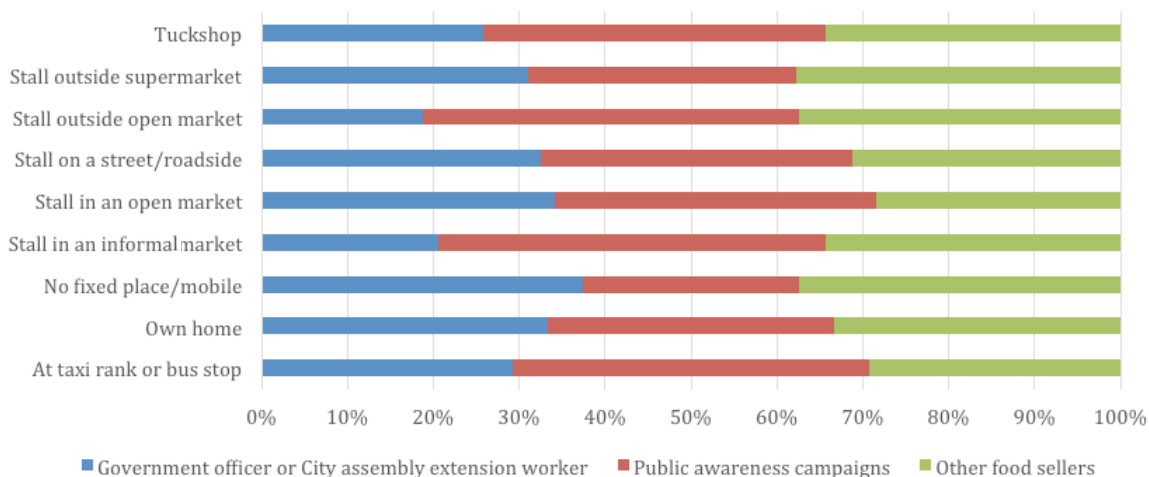
health threats to justify bulldozing street vending areas (Young and Crush 2019). Certainly, knowledge of food handling and food safety on the part of vendors is critical to ensuring that consumers are protected. Just over half of the Windhoek vendors (53%) reported that they had learned about food safety and hygiene from public awareness campaigns (64%) and from other food sellers (53%) (Figure 14). The relative importance of each information source varied slightly by type of vendor (Figure 15).

FIGURE 14: Sources of Information on Food Safety



Note: Multiple-response question

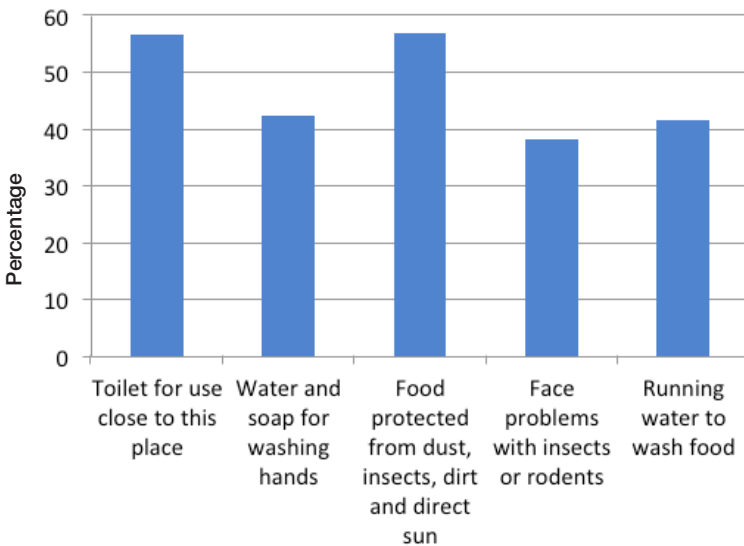
FIGURE 15: Source of Information on Food Safety by Type of Vendor



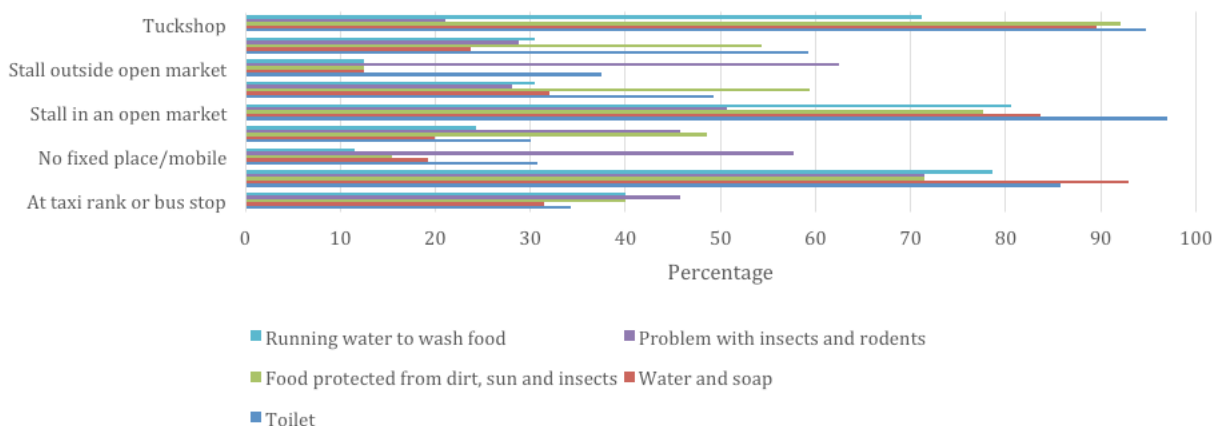
Food safety practices in public spaces require access to appropriate sanitation and hygiene facilities. Figure 16 shows that in Windhoek nearly 60% of the vendors were close to toilets and a similar number reported that their food was safe because they could protect it from dust, insects, dirt and direct sun. However, around 60% did not have access to water and soap for washing hands or running water to wash food at their place of business. Nearly 40% said that they faced problems with insects and rodents.

Toilets were most accessible for those in open markets or trading outside a supermarket or open market, and least accessible at informal markets and taxi/bus ranks (Figure 16). Facilities for handwashing were most available at home-based shops and tuck shops. Facilities to protect against dirt, sun and insects were commonly available at open markets. Insects and rodents were mostly a problem for those with stalls outside open markets. While the City of Windhoek has taken a more permissive stance towards informal vending (especially by providing sanitation and hygiene facilities at open markets), vendors in city-approved informal markets as well as street vendors and mobile vendors do not have the same level of access to basic food safety and hygiene infrastructure. This does not necessarily mean that the food is less safe but it does raise the policy question of how food safety can be maximized at locations outside the open markets.

FIGURE 16: Availability of Safety, Sanitation and Hygiene Facilities



Knowledge of how unsold food is handled and disposed of is essential to designing food safety guidelines and education for informal traders. Most vendors (82%) reported that they consume leftovers at home, followed by those who sell food to customers at reduced prices (57%). Others dispose of leftovers in nearby bins (34%) or give them away (33%).

FIGURE 17: Sanitation Facilities by Location of Business

7. CONCLUSION

The urban informal food sector is growing rapidly in Namibian cities, especially in Windhoek. A recent government survey of the Namibian informal economy found that 54% of all urban informal sector vendors were involved in wholesale and retail trade (in which food and beverage vending plays a major role at nearly two-thirds of all enterprises) (MLIREC 2018). Many of the findings of the general survey are confirmed by the data presented in this report. For example, 62% of all informal businesses were established after 2010, 92% are sole-owned, 69% of vendors are women and only 30% are married or have partners, 38% are 35 years old or younger, and 6% are over 60. Most vendors (77%) did not employ anyone while another 14% had only one employee. The primary divergences relate to location of the business (with 57% of all enterprises being home-based) and the sources of business financing (with only 28% overall using their savings). In addition, the government survey found greater utilization of the formal banking system in the sector as a whole with 24% having applied for a bank loan and 71% of these applications granted. Thus, Windhoek's informal food sector has many commonalities with the informal economy as a whole and some important differences. In summary, the major findings of the survey of Windhoek's informal food vendors are as follows:

- Of the city's 2,421 food vendors, 30% were street traders, 16% ran tuck shops in informal settlements, 14% were home-based, and 26% were market vendors (with roughly equal numbers in the city's open markets and informal markets).
- Food vending is unevenly distributed throughout the city with the greatest concentration near and in the city's informal settlements in the northern half of the city. Smaller clusters are to be found in the CBD, at road transport hubs and outside supermarkets.

- The survey of 470 vendors found that two-thirds were women, three-quarters were single and 36% were age of 35 or younger. Many had a high school education, although female vendors were generally better educated than males. Most vendors had several dependants (an average of six).
- Only 11% of the vendors were born in Windhoek which confirms both the importance of rural-urban migration and the importance of the informal sector in offering income opportunities to migrants.
- Consistent with this finding of rapid and related rural-urban migration, 65% of the enterprises surveyed were less than 10 years old. Very few had started in the 1990s. Rates of business failure and turnover may be high but the survey's focus on currently operating businesses did not explore this issue.
- Nearly 80% of the vendors financed their operations with personal savings. Sole-ownership was the dominant form of operation with 80% of vendors running their business on their own without the help of others. Only 7% of the vendors employed anyone and, of those who did, three-quarters had only one employee. In total, the surveyed vendors employed 51 people (or 0.1 per enterprise).
- Motivations for entering the informal food sector related overwhelmingly to the need for economic survival, financial security and earning income to remit to family in other parts of the country. Two-thirds said they started their business because they were unemployed and unable to find formal sector unemployment.
- Choice of business type and location were strongly related to accessing most customers either passing traffic, at transport intersections and through building up a regular customer base. Important competitive strategies included offering credit to regulars and also stocking what they needed. At the same time, customer cited was cited as a significant business challenge.
- Nearly 60% of the vendors paid no rent and the 17% who paid rent to the city were mainly located in city-run open markets.
- The primary business challenges were economic in nature and included too few customers, insufficient sales, and suppliers charging too much. The sector is extremely crowded and growing, so competition is intense. Most vendors do not try to outcompete their neighbours by price undercutting, except for special deals with their regulars.
- Very few said that competition with supermarkets was a problem, which confirms earlier findings that the formal and informal food retail sectors have a more symbiotic than destructive relationship.
- Vendors acquire information on food safety and hygiene from a variety of sources, but significant numbers do not have ready access to running water and toilets and also face problems with insects and rodents.

In general, it is clear that most informal food vendors in Windhoek are small-scale, precarious and survivalist rather than opportunistic operations. This confirms earlier findings from in-depth interviews with women vendors surviving on the margins amid intense competition (Nickanor 2013). This is not to say that vendors are passive victims of circumstance as many have developed tactics and strategies to develop their businesses. At the same time, most enterprises in Windhoek are single-person operations with limited employment potential. The survey suggests that one of the major obstacles to business expansion is the fact that many vendors are embedded in households and economically responsible for their dependants. This means that income from the business is diverted towards basic livelihood needs of dependants rather than being reinvested. In addition, food bought for the business is also used to feed household members, further constraining profit. A more robust social grant system of the kind proposed by advocates of social protection (Crush et al 2021) would reduce pressure on food vendors to plough resources into household support.

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This report presents the results of the first comprehensive survey of the informal food sector in the Namibian capital of Windhoek. As such, it aims to shed light on the food system of the country's largest urban centre. The informal food sector is critical to the food security of poor urban households in most rapidly growing towns and cities in the Global South. It comprises a dense and diverse network of formal and informal markets, suppliers, transporters, mobile traders, and street food vendors making food more accessible and affordable in low-income areas. The informal food sector represents an "urban laboratory" for examining whether and how inclusive growth strategies can positively affect entrepreneurship and incomes, and help in alleviating poverty and mitigating the crisis of food insecurity. The Windhoek survey found that most informal food vendors are small-scale, precarious and survivalist rather than opportunistic operations. Most enterprises are single-person operations where the income from the business is diverted towards basic livelihood needs of dependants rather than being reinvested. Food bought for the business is also used to feed household members, further constraining profit. Among the report's conclusions is that a more robust social grant system of the kind proposed by advocates of social protection would reduce pressure on food vendors to plough resources into household support.

