

August 2024



Harare Retail

A Data Perspective On Borrowdale and Enterprise Road

ZIMREAL
PROPERTY INVESTMENT FORUM

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Why Harare ???

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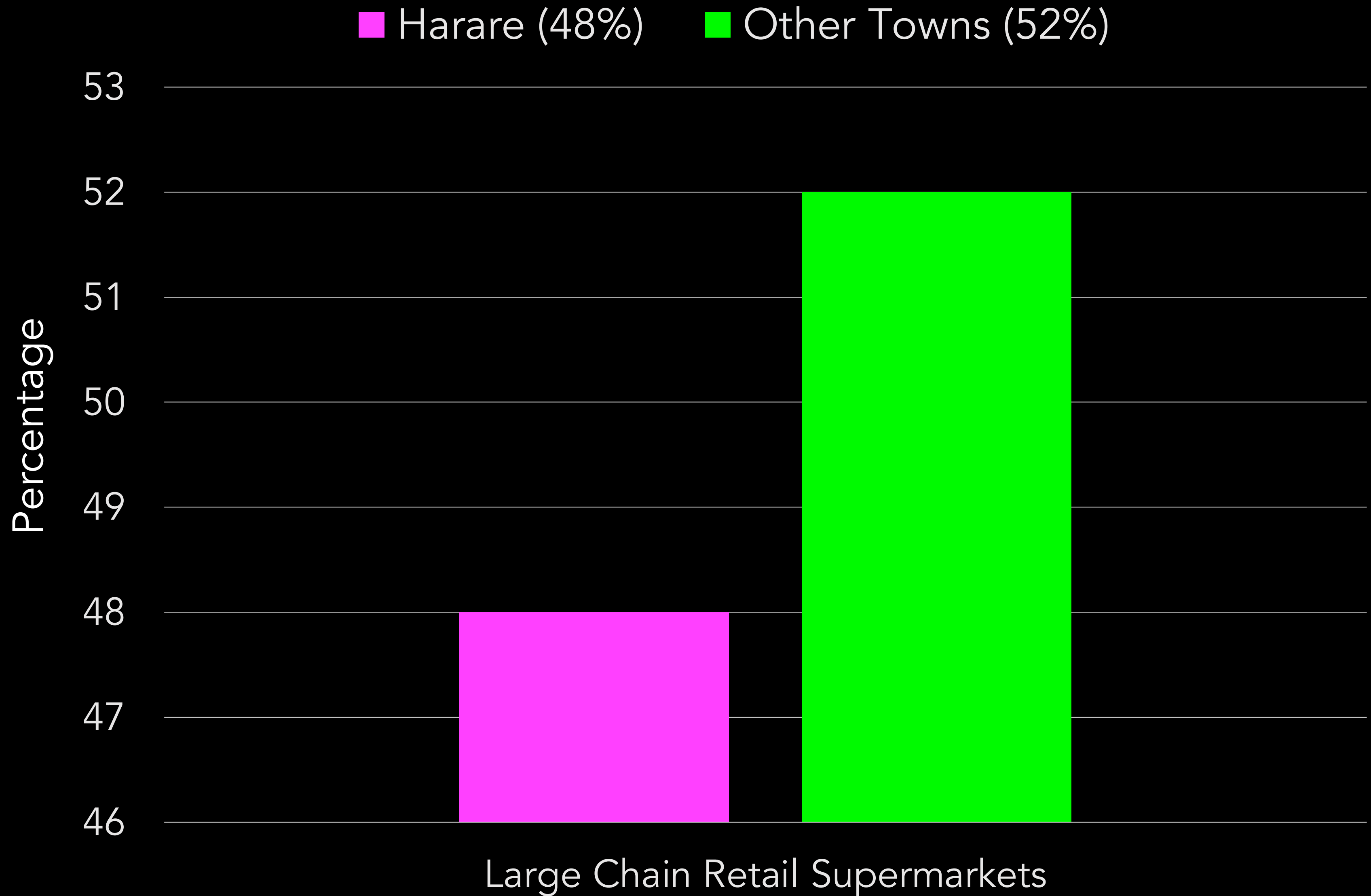
Retail Overview

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Supermarkets (FMCG): Overview

Large Chain Retail Supermarkets

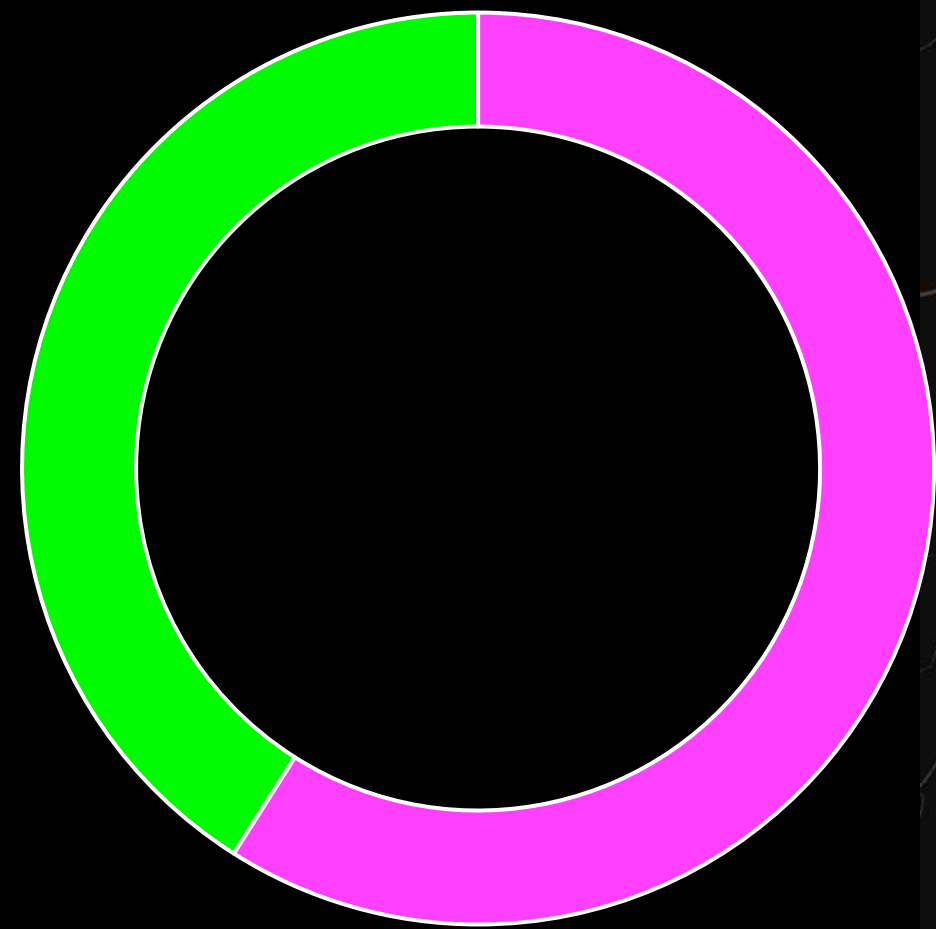
There are over **180 large-chain retail supermarkets** in the country. **48%** of them are in Harare



Quick Service Restaurants: Overview

Large Chain QSRs

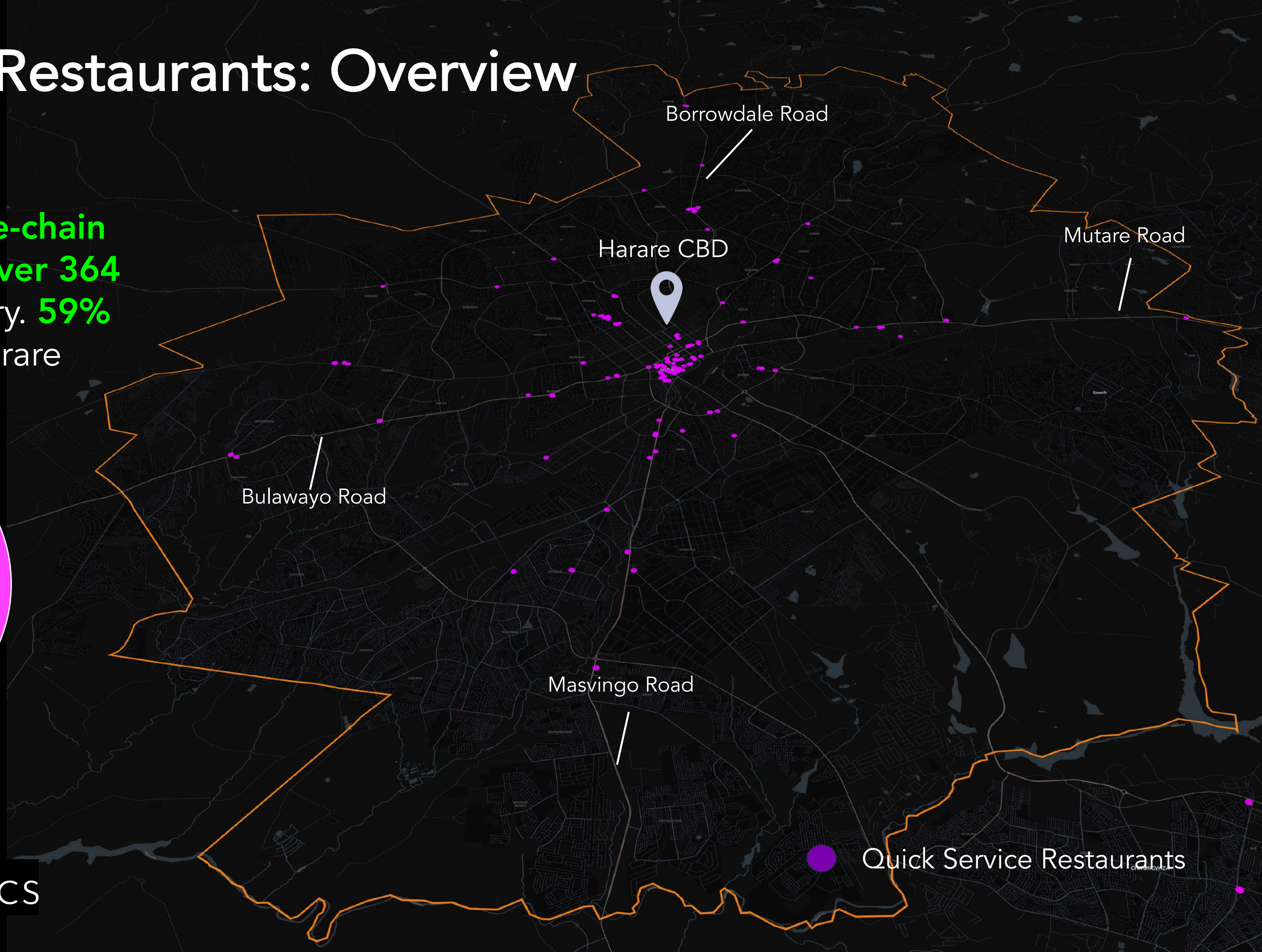
We studied **27 large-chain QSRs brands with over 364 outlets** in the country. **59%** of them are in Harare



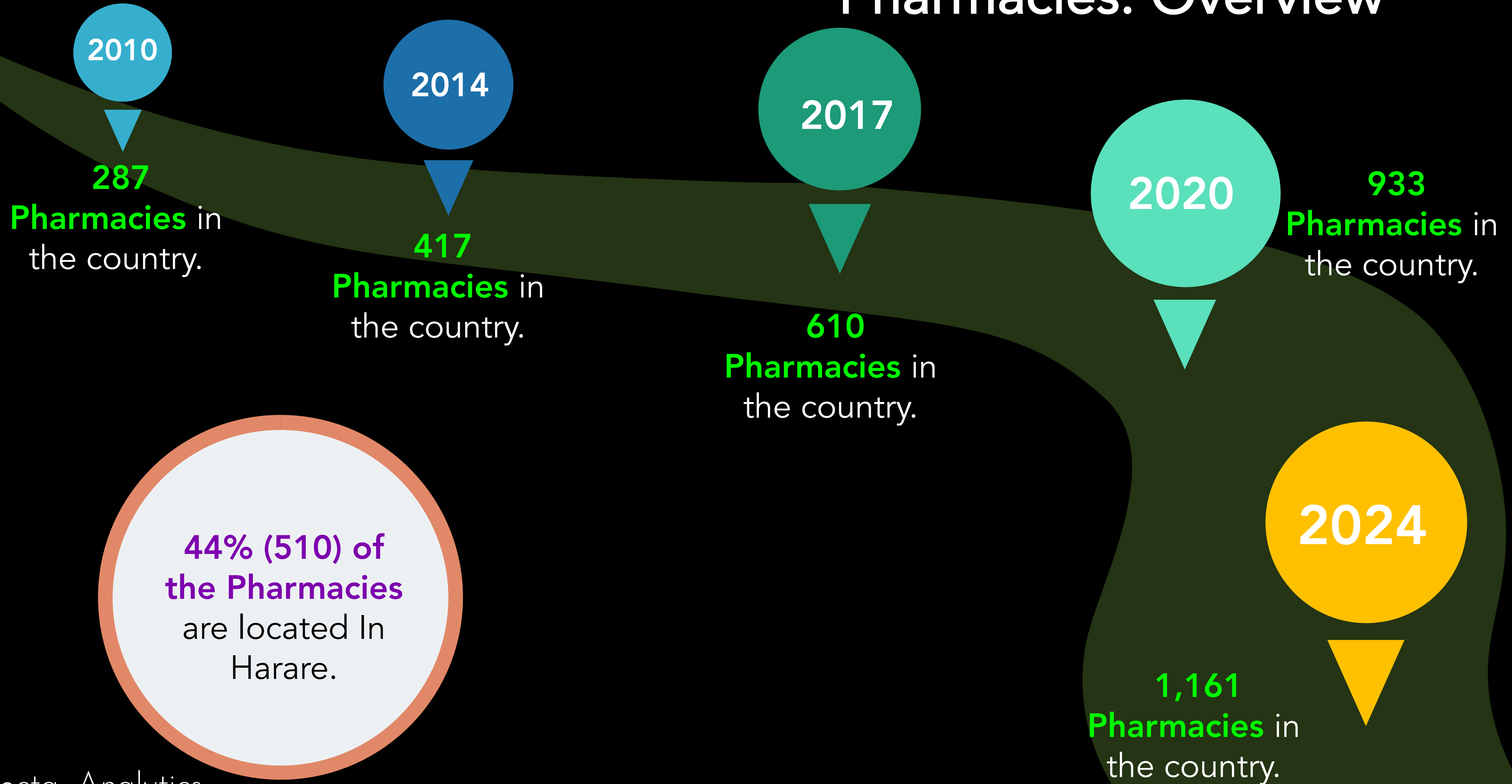
■ Harare (59%)

■ Other Towns (41%)

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Pharmacies: Overview



Petrol Filling Stations: National Overview

Registered Vehicles In Zimbabwe  Zimbabwe: 1,470,955 South Africa: 11,500,000 USA: 283,400,900

Number Of Petrol Filling Stations  Zimbabwe: 1,085 South Africa: 4,600 USA: 196,643

Average Number Of Vehicles Per Petrol Filling Station Zimbabwe: 1,353 South Africa: 2,500 USA: 1,441

Petrol Filling Stations: Overtrading ⁸

2012

In 2012, there were **299 petrol filling stations** in the country.

In 2024, there are **1085 petrol filling stations** in the country.

2024

Currently, **Harare has 301** petrol stations on its own. **Overtrading is now a big risk**



Retail: Borrowdale and Enterprise Corridors

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Traffic Congestion: The Shift from Centralised Hubs to Local Convenience

- **Travel Fatigue:** Increased traffic congestion is leading to longer travel times and greater fatigue for consumers.
- **Shift in Consumer Preferences:** Consumers are increasingly favouring local markets and neighbourhood shops for convenience. The desire to avoid traffic and reduce travel time is driving this shift.
- **Decentralisation of Retail Networks:** The traditional model of large, centralised retail centres is becoming less attractive. Businesses are decentralising their branch networks to better serve local communities. Examples include Quick Service Restaurants (QSRs), petrol filling stations, and supermarkets expanding into neighbourhood locations.
- **The New Retail Landscape:** The future of retail is increasingly focused on smaller, well-distributed outlets. By strategically placing branches closer to consumers, businesses can better meet their needs and preferences.

Traffic Count: Borrowdale and Enterprise Roads

The data shows the traffic counts data for 2 points between 6am and 8 pm, both directions.

Point A: Borrowdale Road, just after Harare Drive towards Hatcliff

24,000 Vehicles

2900

Commuter Omnibuses (12%)

Borrowdale Road

Churchill Road

Enterprise Road

Point B: Enterprise Road, just before Newlands Roundabout

22,000 Vehicles

600

Commuter Omnibuses (2.7%)

Road **Characteristics**: Borrowdale and Enterprise Roads

Borrowdale Road

A mix of low and high income

Seriously deteriorating driver behaviour

Domboshava, Hatcliff

Northgate (large-scale development)
Pomona City & Nyeredzi Ridge

High- about to worsen at scale

Road User Income Affluence

Driver Behaviour

High Density Areas Along The Corridor

Planned Large Scale Residential Developments

Traffic Congestion

Enterprise Road

Largely high-income

Relatively good driver behaviour

None

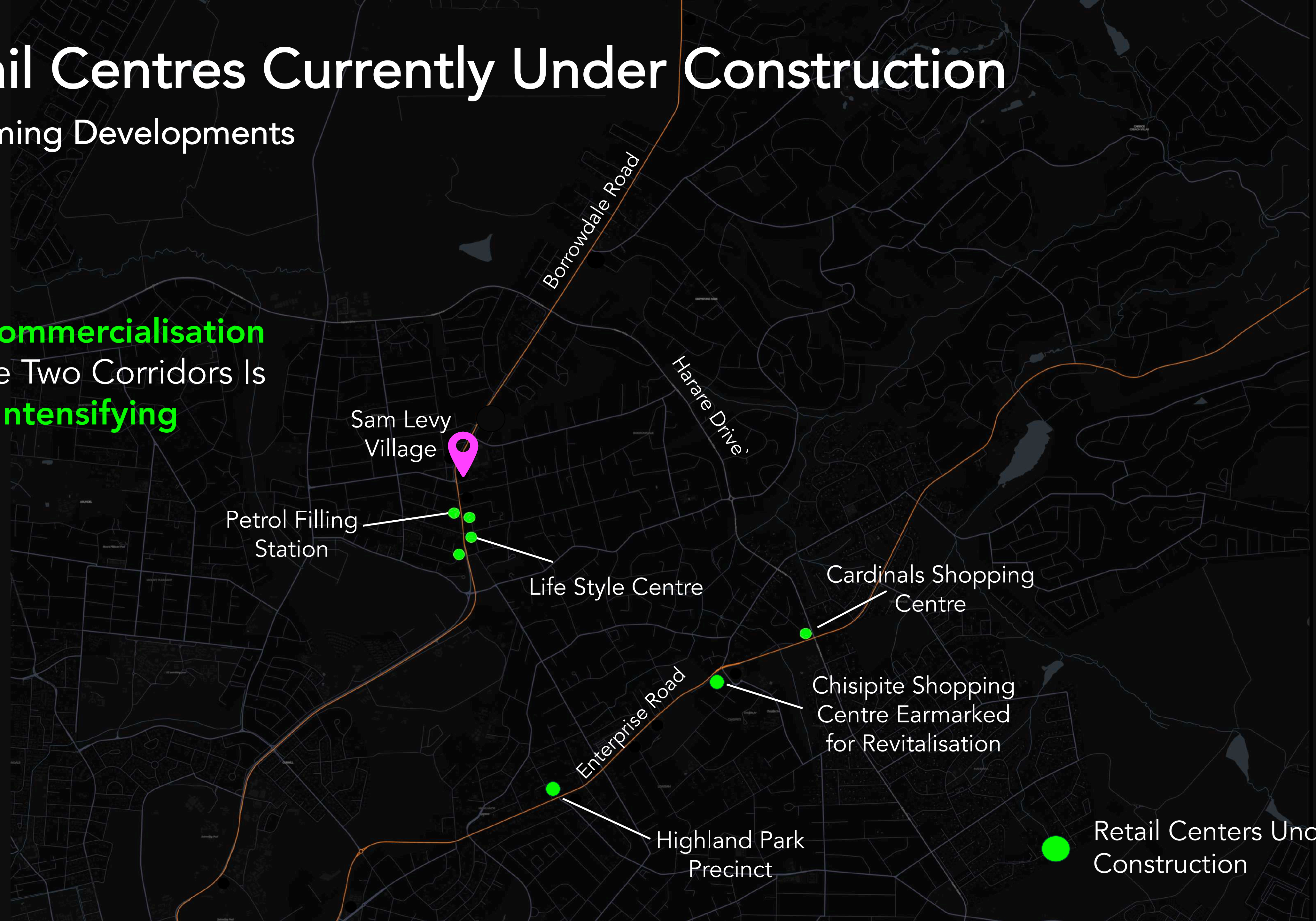
Planned residential development in Chishawasha

Moderate

Retail Centres Currently Under Construction

Upcoming Developments

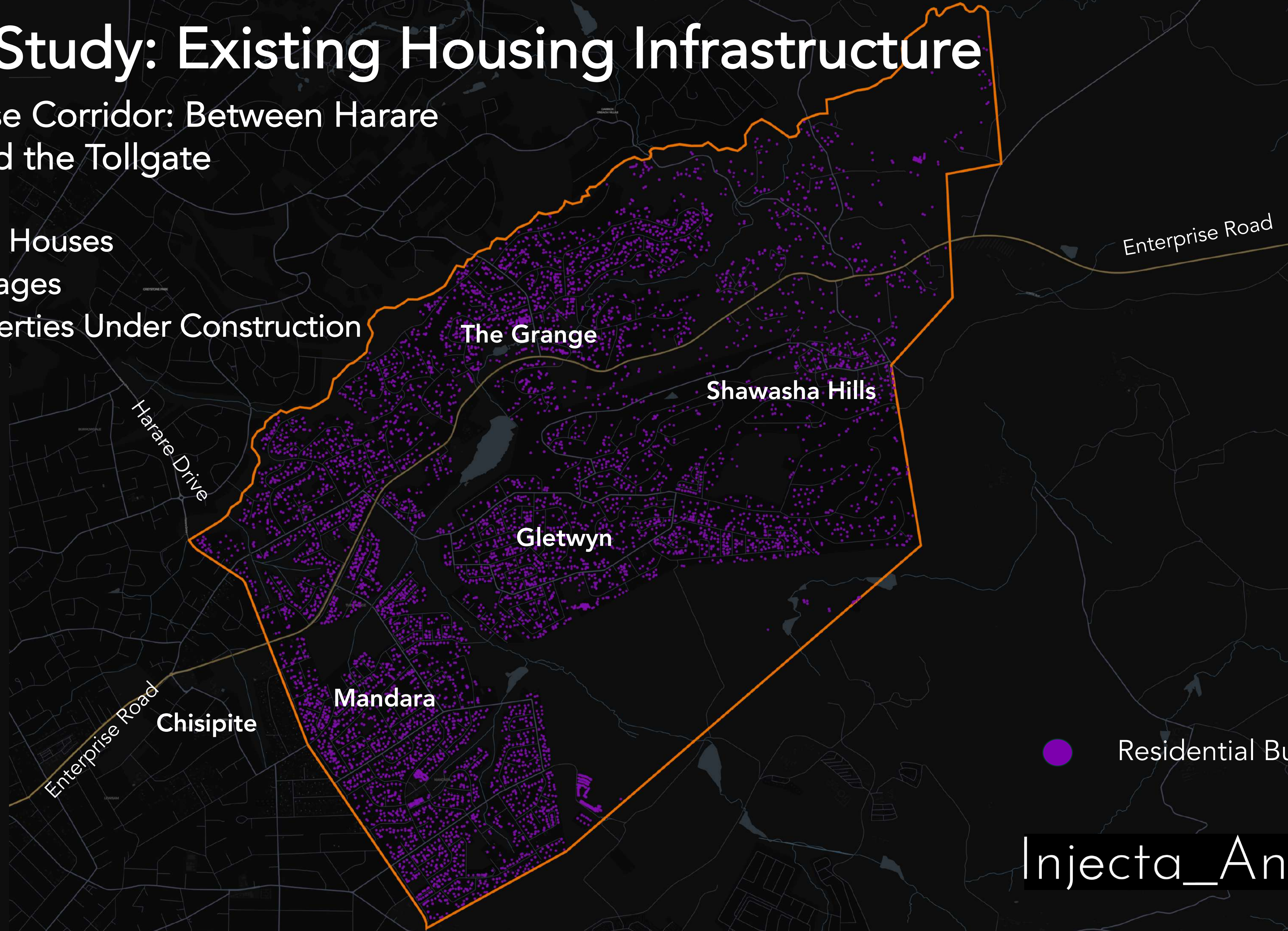
The **Commercialisation**
Of The Two Corridors Is
Intensifying



Case Study: Existing Housing Infrastructure

Enterprise Corridor: Between Harare Drive and the Tollgate

- 3,752** Main Houses
- 2,037** Cottages
- 357** Properties Under Construction

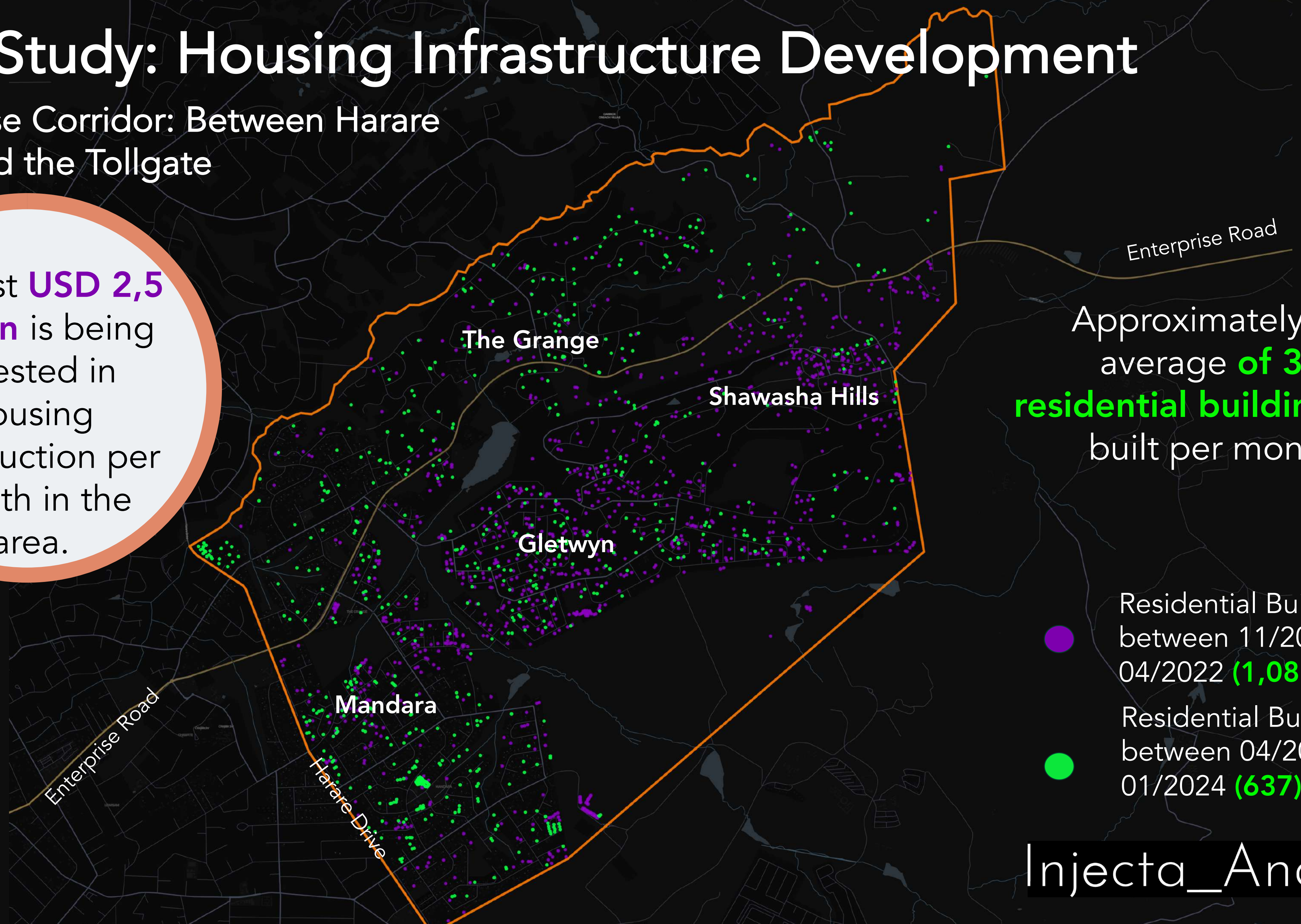


● Residential Buildings

Case Study: Housing Infrastructure Development

Enterprise Corridor: Between Harare Drive and the Tollgate

At least **USD 2,5 Million** is being invested in housing construction per month in the area.



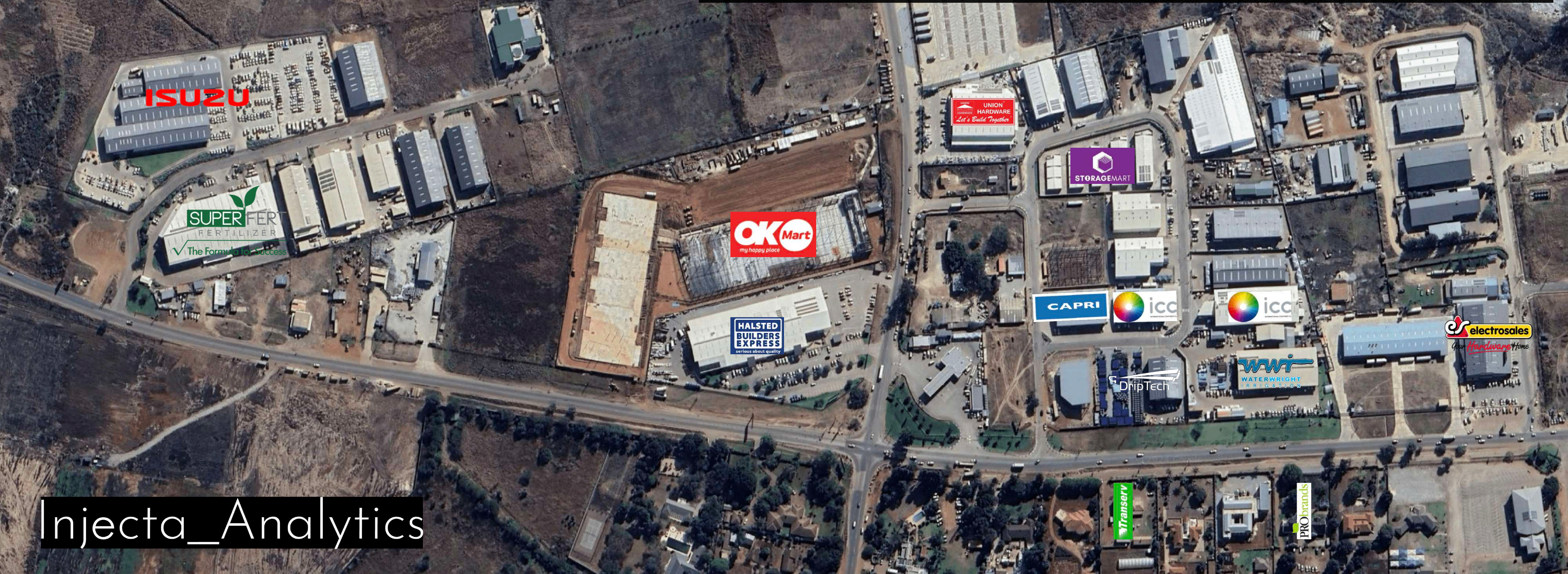
Approximately an average of **32 residential buildings** are built per month

- Residential Building built between 11/2020 and 04/2022 (**1,086**)
- Residential Buildings Built between 04/2022 and 01/2024 (**637**)

Pomona Service Industry

Relatively New Retail Hub Close To Borrowdale Road

- Where warehouses and industrial properties are increasingly being repurposed or developed primarily for **storage, distribution, and selling** rather than **traditional manufacturing**.
- This shift reflects changes in supply chain dynamics, e-commerce growth, and the need for more flexible and scalable logistics infrastructure.
- Businesses in the service industry are now benefiting from **agglomeration economies**.



Pomona Service Industry: Construction Activity

The Map Shows Active Construction Sites
In the Area



OK Mart
my happy place

electrosales
Your Hardware Home

- **FMCG** Players Moving To The Hub
- **Electrosales expanding** its retail business

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Data-Driven Approach

A Basis For Robust & Resilient Retail Investments

Retail Dynamics -The retail landscape is shifting, with consumers now favouring shopping centres that offer more than just functional services. As competition increases with high-quality retail developments, centres that don't provide a desirable mix of shopping, entertainment, and lifestyle experiences are losing their appeal.

Changing Shopping Centre Characteristics- Changing dynamics now want retailers to be constantly evaluating their businesses, particularly the locations and the characteristics of those locations, whether population, demographics, income levels, rate of housing construction, and competing centres, among others, to help inform the strategic direction in light of changing consumer tastes and preferences.

Fundamental Drivers - Look for areas with increased housing development, coupled with the right demographics, and with limited convenience centres nearby. This can contribute to the support of retail in that area.

What We Do

Injecta Analytics is a **location intelligence** company that uses **location data and analytics** to help businesses align strategic goals with location needs to maximise their potential.

Trade Area Analysis

Providing you with value-added location data which helps you calculate the demand for stores, products and services in various locations.

Property Market Research

Location, Location, Location.....Data, Data, Data
Providing you with value-added location data to make more data-driven decisions across the various property market segments

Site Selection & Feasibility Studies

Identify the most viable site based on market potential for your business.

Logistics & Supply Chain Optimisation

Optimise your supply chain and logistics network through location data.

Informal Sector Activity Mapping & Analysis

The informal sector is increasingly contributing to the national economy, hence the need for businesses to optimally position themselves to benefit from the sector.

Customised Business Solutions


Tailor-made location insights to address specific business challenges facing organisations


Helping you understand your consumer and competitive landscape through location data & insights.

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Beyond Location To **Intelligence**

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