

## The Evolution of Chibuku Beer

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### Abstract

This paper looks into the evolution of the Chibuku –opaque beer from its humble beginnings in the 1950s. It also looks into how the beer has survived over the years to dominate the opaque beer industry in Africa. Chibukuis arguably the face of opaque beer. This was first brewed in 1955 by Max Heinrich, a German national who had the habit of brewing, making various brews from potatoes to “relieve the boredom” after World War 2. His habit of keeping records of brewing formulas and recording details of customer’s feedback about his various brews saw led to the founding of a company Heinrich’s Syndicate Limited (HCBL). They also called the beer “Chibuku” —meaning “by the book” a reference to the book. (The Economist, 2022; Hesse, 2015; Chimhete & Makombe, 2020). The beer has evolved over the years and now has new packaging, new variants and new modifications with exports to varying Southern Africa countries.

**Theory:** Resource-based and Opportunity linked Entrepreneurship

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### I. Introduction

The real story of opaque beer in Africa is in the many local recipes that adapt to using ingredients locally available on the African continent. Opaque beer is cloudy beer that is consumed while it is actively fermenting. The beer is made with malt and un-malted flavour, often including bananas to provide additional sugar. The grains used may be millet (*Pennisetum glaucum*), sorghum (*Sorghum bicolor*), or maize (*Zea mays*). Some of these beer styles are produced commercially, for example, SABMiller, the world’s second largest brewing company by volume, brews an opaque beer called *Chibuku*. *Chibuku* is a maize or sorghum-based beer sold throughout southern Africa, which originally was often packed in waxed paper containers like those sometimes used for milk. A one-litre bottle of *Chibuku* costs the equivalent of US\$1. *Chibuku* is yeasty and sour and has a thick layer of sediment that is consumed with the beer.

#### 1. History of *Chibuku* in Africa

*Chibuku*, is a traditional lumpy drink with porridge-like consistency and a “sour” taste. General opaque beer has however been brewed and consumed in African villages and huts for millennia as homebrewed beer. The emergence of *Chibuku* as a more formalized and commercial drink, though, is often attributed to Max Heinrich, a German national. He, in the 1950s wrote down a local brewing formula in what is today’s Zambia. Max and his colleague, and German national Gustav Braun, had been interred in Rhodesia during Second World War and had taken to making various brews from potatoes to “relieve the boredom” (Business Weekly, 2017). When the war ended, the two decided to commercialise their operations by focusing on the traditional beer market, which relied mostly on availability of product rather than a standard recipe. The brewers adopted the habit of keeping a book in which they recorded all adjustments to the raw material quantities as well as any changes to brewing techniques. They thus founded Heinrich’s Syndicate Limited (HCBL), in Northern Rhodesia (now Zambia) in 1955 (Chimhete & Makombe, 2020).

Brewery staff began calling the beer “*Chibuku*” —meaning “*by the book*”, a reference to the brewery recipe book used by Heinrich and company to record details of customers’ responses to the brew after each delivery (The Economist, 2022; Hesse, 2015; Chimhete & Makombe, 2020). From its first stronghold in Zambia, HCBL then spread its wings into neighbouring countries, first into Nyasaland in 1960 (Chimhete & Makombe, 2020). However, the Nyasaland venture was short-lived, for soon after the country gained its independence, the government summarily withdrew the HCBL license and closed its brewery (C.M. Rogerson and B.A. Tucker 1985, 361). It was in 1962, in Southern Rhodesia (now Zimbabwe) that Heinrich’s Syndicate registered remarkable success (Chimhete & Makombe, 2020). To date, *Chibuku* has been launched in no less than fourteen African countries covering a geographic swath from Ghana to Tanzania and from Uganda to Lesotho.

✚ Botswana it is brewed by Botswana Breweries subsidiary of Kgalagadi Breweries Limited

- ✚ Ghana by Accra Brewing Limited
- ✚ Malawi by Chibuku Products Ltd
- ✚ Mozambique by Cervejas de Mocambique
- ✚ South Africa by United National Breweries (SA)
- ✚ Tanzania by Tanzania Breweries Ltd
- ✚ Uganda by Nile Breweries Limited
- ✚ Zambia by National Breweries PLC (Zambia)
- ✚ Zimbabwe by Delta Corporation

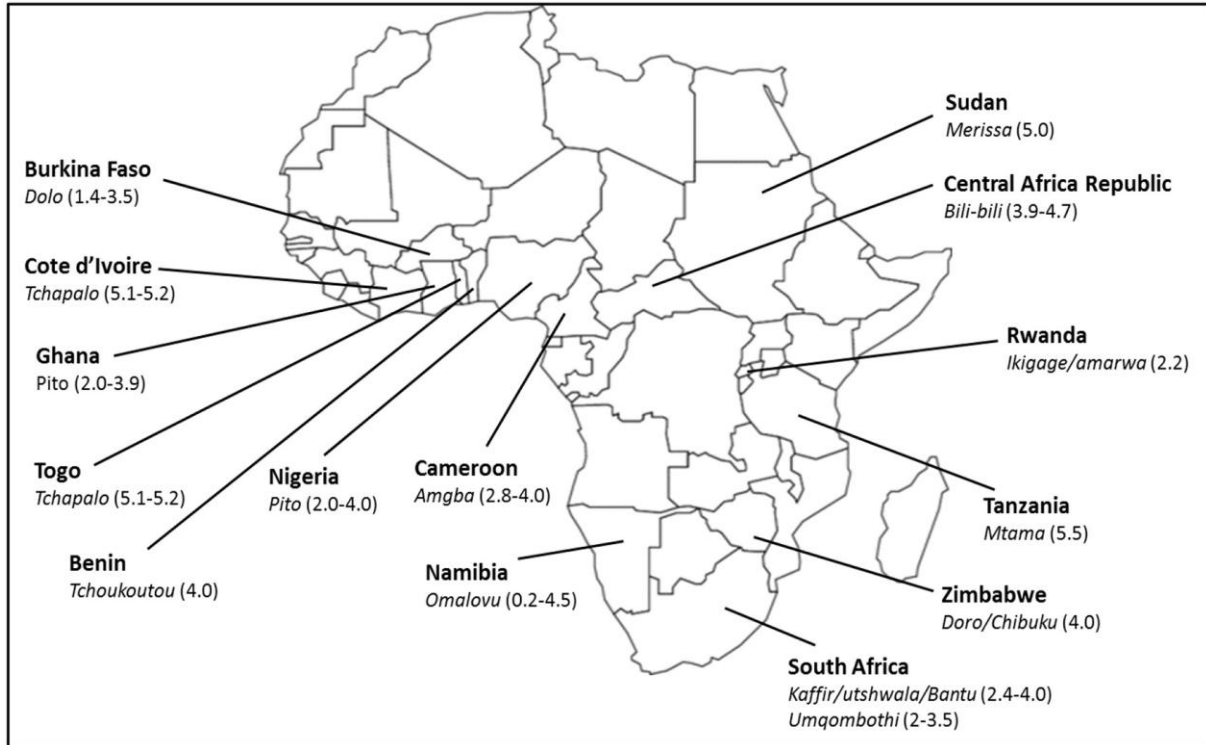


Figure 1: SABMiller's Chibuku reach in Africa(Mawonike, et al., 2018)

In Zambia, SABMiller now has five breweries in Kitwe, Ndola, Lusaka, Kabwe and Chipata, of which only the two at Kitwe and Lusaka are operational. SABMiller has taken the formalization of *Chibuku* to the extreme, offering a “traditional” African beer brand of the same name in markets throughout the continent. *Chibuku* (the SABMiller branded version) was originally packaged in distinctive blue-and-white cardboard cartons. Drinkers usually gave the container a series of vigorous shakes before peeling the drink open in order to mix the ingredients, which tend to separate into a milky liquid on top and a yogurt-like paste on the bottom. This earned it the informal name “*Shake, Shake*”. Early versions of the drink had a shelf life of about five days and it would often become more alcoholic with time as fermentation would continue right up to when the drink was dispatched (Mawonike, et al., 2018).

Today's *Chibuku* has a shelf life of around twenty-one days and the alcohol content has become more consistent (The Herald, 2013). In some markets cardboard containers have been replaced with plastic ones, complete with screw-top lids. *Chibuku* is now not only purchased at bars and stalls for immediate consumption, but is taken off premises, too, to be consumed in homes and at parties. Plus, as the shelf life of the product has improved. Many consumers like the fact that SABMiller's *Chibuku* is priced at 60 percent of the average cost of most bottled commercial beers.

## 2. Chibuku comes to Zimbabwe amidst legal challenges

When Heinrich's Syndicate Company recorded disappointment in Nyasaland (now Malawi), after their licence was withdrawn in 1960, when the country had gained political independence from British rule (Chimhete & Makombe, 2020), the company set its eyes on Southern Rhodesia (now Zimbabwe). In Zimbabwe, together with some farmers, Heinrich Syndicate opened their first brewery south of the border in 1962 in Fort Victoria (now Masvingo). The Syndicate got permission to operate in the country in 1961 amidst strong opposition from four municipal authorities, namely Bulawayo, Gwelo (now Gweru), Salisbury (now Harare) and Umtali (now Mutare) (Chimhete & Makombe, 2020).

Until 1961, the Rhodesian colonial authorities had not allowed private players in the manufacture of opaque beer. By then, the production and selling of opaque beer was a monopoly business reserved for Municipal councils such as Salisbury City Council, who operated their business through its Liquor Undertaking Department (LUD)(Chimhete & Makombe, 2020). The councils were determined to maintain their monopoly and were not going to give it up easily. The Mayor of Fort Victoria who had granted HCBL the licence to operate,quoted saying that that the major advantage of contracting to private enterprise was that “*the risk of sour beer is reduced to a minimum and, in fact, if the beer is not to the palate of the consumer, the suppliers undertake to replenish the stock with palatable beer*”(Chimhete & Makombe, 2020).

During that time too, prior to 1962, the consumption of beer was regulated by the Kaffir (African) Beer Act (1911) and the Liquor Act (1930)(Chimhete & Makombe, 2020). Africans were generally not permitted to drink European liquors up to 1962(Chimhete & Makombe, 2020). These included “any spirits, wine, beer, ale, porter, perry or other fermented, distilled spirituous or malt liquor of any intoxicating nature. However in 1962, there were beer reforms that allowed Africans to drink any type of alcoholic beverage in any establishment that was prepared to serve them(Chimhete & Makombe, 2020). Although this reform was a landmark in the African alcohol industry, significant hurdles still remained to prevent Africans from drinking the type of alcoholic beverages they desired in the establishments they wanted. The Liquor Undertaking Department (LUD) of the Salisbury City Council (SSC) retained its monopoly in the African Townships. Its beer halls and gardens that dominated the African Townships did not always stock alcoholic beverages manufactured by private players(Chimhete & Makombe, 2020). This limited urban Africans’ choices of not only the type of alcoholic beverages legally available to them in their locations, but also where they could drink such beverages.

Prior to this liberalization, HCBL only had the license to sell its beer in Fort Victoria (now Masvingo) and did not have the license to sell its beer in Salisbury (now Harare) and other cities such as Umtali (now Mutare), Bulawayo, and Gwelo (now Gweru)(Chimhete & Makombe, 2020). HCBL however was so determined to capture the bigger market in Salisbury, the Capital city that it illegally sold its *Chibuku* beer in Salisbury in connivance with bottle store owners and shebeen operators(Chimhete & Makombe, 2020). By the 1960s, HCBL’s *Chibuku* beer was reportedly popular among Africans than Salisbury’s City Council-produced beer inferior not only to European-type clear beers, but also to HCBL’s *Chibuku* beer(Chimhete & Makombe, 2020). In addition to these unconventional business practices, HCBL, set up a strategic brewery in Seke(nearby Salisbury), just outside the SCC boundaries, thus providing a convenient base to smuggle opaque beer to the nearby African townships(Chimhete & Makombe, 2020).

### 3. Dry powder Chibuku

In the mid-1970s, HCBL also invented a new product, dry beer (also called beer powder or instant beer; malt mixed with yeast, which became potable by adding water), which aided the company’s penetration of the Salisbury market(Chimhete & Makombe, 2020). Under the African Beer Act, it was not an offense for a company to sell dry beer to anyone, nor was it an offense to be found in possession of such dry beer. HCBL took advantage of this loophole and freely sold this product to shebeen operators who would turn it into potable beer. *Chibuku* dry beer was packaged into 15 kg bags that made up to 100 litres of beer(Chimhete & Makombe, 2020). The beer matured within 24 hours and would keep for 100 hours(Chimhete & Makombe, 2020). HCBL benefited from reduced deliveries and, therefore, the distance travelled by its vehicles. Shebeen operators profited in that the powder was comparatively cheaper, and since it matured within 24 hours, it reduced the chances of being caught selling an illegal product and moreover, the dry beer had a long shelf span especially when compared to the “traditional” “seven days” brew.

### 4. HCBL finally gets the licence in Salisbury, Zimbabwe’s biggest market

Towards Zimbabwe’s independence in April 1980, the Salisbury City Council (SCC) and Heinrich’s Chibuku Breweries Limited (HCBL) signed an agreement that not only transferred ownership of the City council’s Rufaro Brewery to HCBL, but also allowed the latter’s products to be sold side by side with Rufaro’s products in municipal liquor outlets(Chimhete & Makombe, 2020). By the time the SCC signed the Agreement with HCBL, in many ways, the Agreement merely confirmed what was already on the ground: *Chibuku* and other alcoholic beverages were now being widely sold in the shebeens of Salisbury.

To date, *Chibuku* is now brewed across 14 Delta Beverage Breweries subsidiaries throughout Zimbabwe(Mawonike, et al., 2018). It is brewed using advanced technologies, unlike traditional beers brewed in rural areas of Zimbabwe, Tanzania, Zambia, Ghana, Nigeria and other African countries. The beer is made from maize grits, sorghum, sorghum malt, barley malt, water, lactic acid and a top fermenting strain of the yeast *Saccharomyces cerevisiae*(Sawadogo-Lingani, et al., 2021).The product is an opaque pinkish-brown liquid containing suspended and dissolved solids (3.6% w/v), with an alcohol content of 3-5%, a pH of 3-4 and lactic acid levels around 0.5 g/L. Essentially, and the process involves lactic acid fermentation as well as alcoholic fermentation.

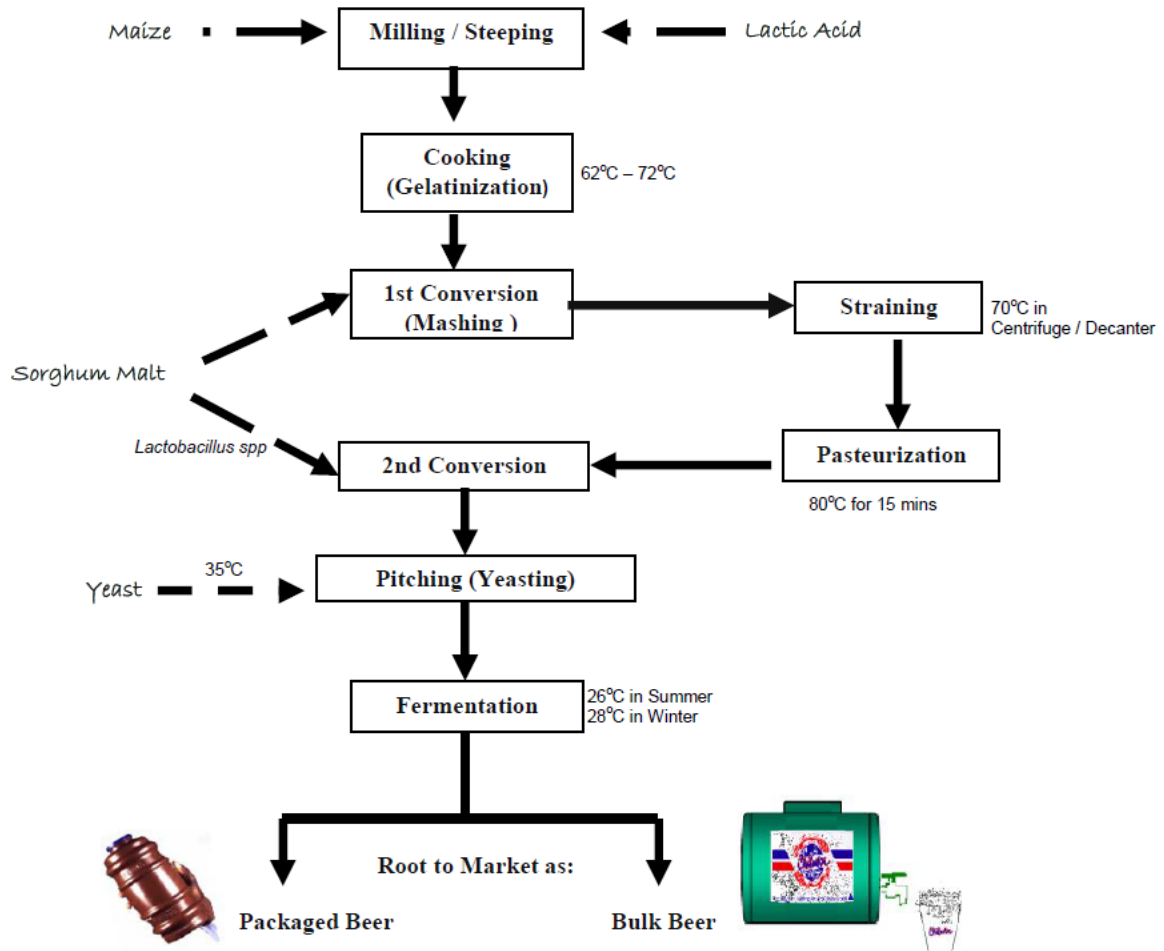


Figure 2: The Chibuku brewing flowchart(Mangwanda, 2022)

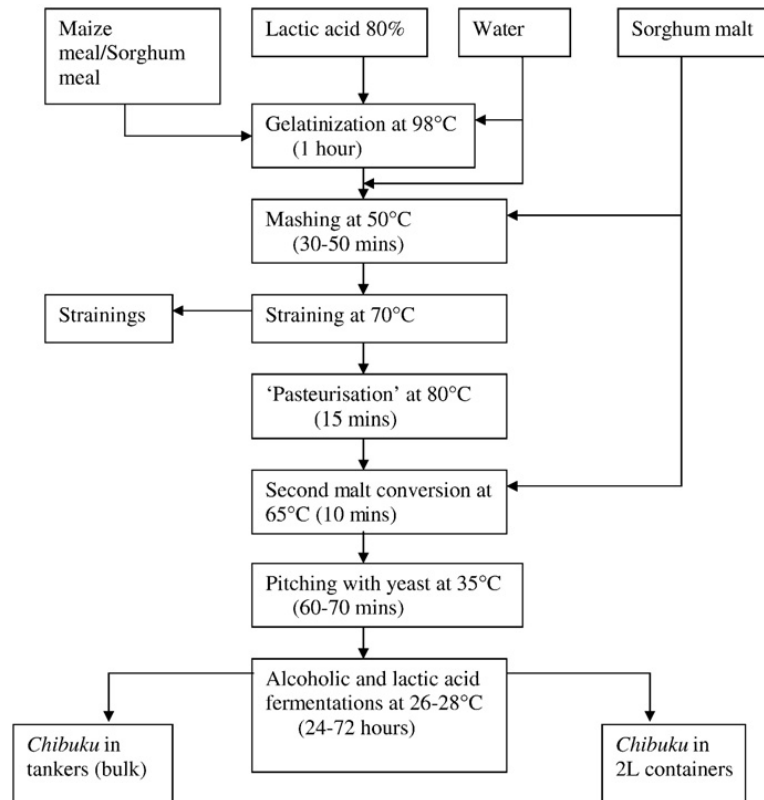


Figure 3: Generic Flow Chart of the Chibuku brewing process(Mawonike, et al., 2018)

### 5. Expansion in Zimbabwe and the takeover of Zambia’s Chibuku

The Chibuku brand is produced in Zimbabwe by Delta Corporation, which is SABMiller’s subsidiary. There are 12 Chibuku Breweries in Zimbabwe which are located in Harare, Chitungwiza, Fairbridge, Zvishavane, Kwekwe, Chipinge, Chiredzi, Rusape, Kadoma, Chinhoyi, Masvingo and Mvurwi (Mangwanda, 2022). In demonstrating its aggressive expansion drive, Delta Corporation Zimbabwe acquired 70% of the National Breweries Zambia shares from AB InBev in December 2017 (Natbrew Zambia, 2017).

Chibuku Breweries seek to produce quality traditional opaque beer guided by its consumer services charter where excellence and quality consumer services are the cornerstones of the organization. The company strictly observes its strategic road map with great emphasis on maintaining quality standards in opaque beer production. The vision of the company as a whole, states that, “We are, and seek to remain an integrated total beverages business dominating all sectors of the cold beverages market in Zimbabwe.” (Delta Corporation, 2022)

By this virtue, Chibuku is arguably the most consumed alcoholic beverage in the Zimbabwean market (Mangwanda, 2022). This has been made especially true by the introduction of Chibuku Super, a carbonated product made at the Chitungwiza plant.

### 6. Evolution of Chibuku

The first Chibuku product were packaged in sold throughout southern Africa, often in waxed paper containers like those sometimes used for milk. Chibuku beer is normally packaged after at least 15 hours of fermentation (Mangwanda, 2022). In Delta a variety of packaging machines are used but the product is an equally high quality 2 litre bottle affectionately referred to as the Scud. To date, Chibuku now has 4 main product types

1. **Chibuku Scud** a non-carbonated beer which has been the traditional form of the beer and the relatively newer
2. **Chibuku Super** which is a carbonated sorghum beer brewed with the finest maize and sorghum locally grown in Zimbabwe;
3. **The bulk packaging form**
4. **Banana –flavoured Chibuku super.**

**7. New Product Formulations**

In 2013 Delta Beverages launched the *Chibuku Super*, a unique carbonated sorghum beer, with a new screw packaging(The Herald, 2013). This new product had an extended shelf life of 21 days(The Herald, 2013). The extended shelf life was a plus for retailers who could now stock more products without worry of deteriorating quality. The New Product was a result of a US\$6 million injection for a new *Chibuku super* plant in Chitungwiza(The Herald, 2013). The new plant was reportedly designed in Germany with features that included an online blow moulder, a pasteuriser, and a shrink wrapping machine.

In 2022, Delta Beverages introduced a new form of *Chibuku*, the Banana flavoured version of the sorghum beer(Business Times, 2022). This Chibuku Super banana flavour variant is brewed with the same taste profile as its sister brand offering a unique carbonated taste experience with a well-balanced flavour(Business Times, 2022).

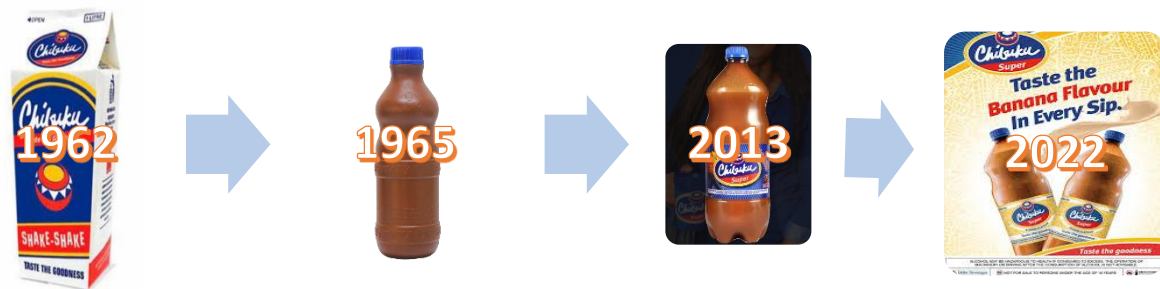


Figure 4: New Product Development of the Chibuku product over the years

**8. Theoretical framework of Chibuku’s evolution**

The entrepreneurial process is often conceptualized as stage-based or as a life cycle. The evolution of *Chibuku* fits with this model which, to a greater extent borrowed from biology where life cycles of flora and fauna are studied extensively.

In ecology and biology, there are stages of development or decay present in many phenomena. These theories start with the assumptions of birth, growth, maturity and decline. By definition a life has a beginning and an end, which provides initial boundary conditions for the theory. What happens in between, or those inner-transitions, are where we are going to find most of the action in terms of debate.

Kazanjian and Drazin (1990) suggest four stages to explain how an entrepreneurial opportunity becomes a business. They propose that the drivers and resistors of entrepreneurship are different at each stage of venture development. This theory is applicable only to certain types of organizations. Specifically, the assumptions of this model are:

1. it holds only for technology based new ventures that market a physical product (i.e., no services);
2. it explains only internally generated growth, not growth by acquisition or merger Probably only the first stage or two is really about entrepreneurship, whereas growth and stability are really managerial issues after a certain point.

The stages of this model are:

1. conception and development
2. commercialization
3. growth
4. stability

## 9. The operating Environment:

### 9.1 Global Overview

- Rising global inflation.
- Impact of Russia/Ukraine conflict.
- Covid-19 impacts persist.

There has generally been rising global inflation that has pushed global food prices higher and the increased the cost of doing business. This has been also been worsened by the Russia/Ukraine conflict and the COVID-19 impacts. This has affected businesses all over the world with the restrictions in social activities and shutdown of many industries categorised as non-essential services in 2019-2021.

### 10.2 Zimbabwe

- ✚ Resurgent inflation.
- ✚ Currency depreciation/multiple exchange rates.
- ✚ Strong consumer demand driven by:
  - High velocity of ZW\$.
  - Infrastructure projects and mining activities.
  - Marketing of commercial crops.
  - Increase in foreign currency salaries and wages.
  - Relaxation of Covid-19 restrictions leading to increase in social activities.

The Zimbabwean operating environment has not been steady for over a decade. This has seen the country going through one of the worst economical phases around 2000-2008, with a record hyperinflation, a record second only to Venezuela.

Fast-track to 2022, there has been a resurgent inflation in Zimbabwe and currency distortions characterised by multiple exchange rates in the market. These factors have made it hard to do business and price products. Losses could be made due to exchange rate distortions.

On the consumer side, there has been a strong demand for products including the *Chibuku* beer and this has been due to high velocity of the local currency (ZW\$), infrastructure projects and mining activities in the country (roads for example), the strong marketing of commercial crops and a general increase in foreign currency based salaries and wages in Zimbabwe. In addition, the relaxation of COVID-19 restrictions has led to an increase in social activities in the country. This has pushed more beer consumption.

The *Chibuku* product has survived over these years and is promising to even to have positive prospects into the future despite some challenges in the country. In their 2022 Annual General Meeting (AGM) Report, Delta Corporation reported volume sales growth in the sorghum beer category. They attributed this growth to improved marketing of cash crops, improved supply of scud; packaging materials outages resolved, increased social activities, and the launch of *Chibuku* Super Banana flavour (Delta Corporation, 2022). Delta cited *Chibuku* Super capacity limitation, as one of the major challenges they are facing.

## 10. How *Chibuku* has survived over the years

Since 1962, when the *Chibuku* product was launched, there have been beer brands that have lost market share significantly. One can mention brands such as Lion Lager and Bohlinger's larger as notable example which are now rare on the market. What has really made this *Chibuku* continue to survive over the years are a number of factors among them:

- New Product Formulations
- New packaging designs
- Marketing
- Pricing of the product
- The *Chibuku* local recipe

### 10.1 New Product Formulations

Since 2013, the *Chibuku* brand has added two new product formulations. First was the *Chibuku* super beer in 2013, which was a carbonated version of the *Chibuku* with an extended shelf life of 21 days (The Herald, 2013). *Chibuku* super brought with it a fresh and unique taste. In 2022, Delta Beverages launched the banana-flavoured *Chibuku* super, another product that is gaining popularity among the *Chibuku*-loving consumers. The addition of flavoured variants of *Chibuku* will give consumers more options.

### 10.2 New packaging designs

The new *Chibuku* designs have improved product preservation and shelf life. The screw-top bottles and the carbonation have played a good role in extending the shelf life of the product and also the product marketing tags have given the product a good appeal as compared to the traditional non-labelled *Chibuku* scud packages.

### 10.3 Marketing

The Chibuku beer has positioned itself as a “traditional” beer that represents our African culture. During funerals, it is so common to see mourners gathered around a case of *Chibuku*. The Chibuku brand has become the corporate face of the **ChibukuNeshamwari Traditional Dance Festival**, a popular dance development festival organised by Delta Beverages with the assistance from National Arts Council of Zimbabwe and Zimbabwe National Traditional Dance Association (ZNTDA)(National Arts Council of Zimbabwe., 2018).

### 10.4 Pricing of the product

The *Chibuku* beer has been priced below the market price of premium beers, hovering below or at US\$1 a bottle. This has positioned the *Chibuku* beer as a budget beer that has found popularity among the low class population. It is the beer of choice for cash-constrained labour force in the country who have low disposal incomes. With low disposal incomes, consumers in Zimbabwe would tend to go for low priced beer brands that do not overstretch their pockets.

### 10.5 The *Chibuku* local recipe

The moniker, “*local is lekker*” can be correlated with *Chibuku*. Max Heinrich’s *Chibuku* beer formula, relied mostly on the availability of locally available raw materials rather than a standard recipe of beer which has been brewed in Europe, which would require for example barley, hops and other materials. *Chibuku* is thus a formalised traditional beer. This has enabled beer to be priced as a budget beer below the price of premium beers.

### 10.6 Africa is an untapped beer market which is promising

Africa has the fastest growing population, according to the United Nations. In terms of formal beer drinking statistics, the average African sips a mere 8 litres of commercially produced beer a year, compared with the 70 litres or so drunk by the average American (The Economist, 2022). Brewing companies know this fact however they are also not oblivious to the fact that Africans tend to drink lots of informal, homebrewed beers made from sorghum, millet or less anything fermentable (The Economist, 2022). A survey by SABMiller, a London-found that Africa’s homebrew market is four times bigger than the formal market, measured by volume (The Economist, 2022).

Brewers are betting that Africa’s fast-growing middle class will want to trade up and move into more commercial beer as their disposable incomes expand. SABMiller, which operates in 37 African countries, is trying to woo homebrew-lovers with sorghum and cassava beers that are consistently good. This could be so true in Zimbabwe as Delta Beverages cited in their AGM Report 2022, that they were facing *Chibuku* Super Capacity limitation, meaning demand could be greater than the supply.

## 11. Challenges

- ✚ Prevailing low disposable incomes in formal sectors.
- ✚ Disruption from policy interventions e.g. SI 118A/2022.
- ✚ Power supply interruptions.
- ✚ Mid-season drought – concern about food security.
- ✚ Threats from entrance of new competitors e.g. Innscor’s Nyathi beer launched in 2022

## 12. The futuristic view

*Chibuku* as a brand is forecasted to continue to dominate on the market using *First mover* advantages. *Chibuku* is unarguably the face of opaque beer. Delta Beverages is thus expected to shrug off competition from competitors and new entrants such as Innscor’s Nyathi opaque beer. However, to continue dominating and maintaining the monopoly, Delta is expected to continue churning new product formulations on the market. This is going to expand its product portfolio. In 2022, Delta launched the Banana-flavoured *Chibuku* super beer. Earlier in 2013, the company had launched the first ever carbonated *Chibuku* product which extended shelf life of the product from five to twenty one days. Delta must however be reminded that competitive advantage is not permanent. There used to be a Nokia brand of phones which dominated the phone business, but where is it today? There is always the need in business to continue innovating and investing in Research and Development in addition to investing in cutting age technologies and modern machinery and plants.

Delta however needs to work on its capacity challenges. Currently Delta has cited in their AGM Report 2022, that they were facing *Chibuku* Super Capacity limitation, meaning demand could be greater than the supply. There definitely is need to invest in new equipment to meet the resurging demand. The Banana-flavoured beer is notably a hotcake in the market and Delta is seemingly failing to meet consumer demand.

In terms of product pricing, Delta is also expected to remain priced at below the price of premium beers. This is largely due to local availability of raw materials such as sorghum and the strategic farmer out grower programmes that are funded by Delta Corporation to sustain its supply chains.



Delta may also need to continue with influencing and lobbying the government for favourable beer laws such as the lowering or abolishing of beer taxes. This will help them in cutting cost, in driving more demand of their products and better pricing of their products.

In terms of power supply challenges, there is need to invest in private power technologies that can serve their plants and operations. Solar technology is one feasible option which could go a long way in cutting the company's electricity bill.

Delta also needs to continue with sorghum farmer out grower programmes and if possible increase the number of farmers on the programme. Funding agricultural programmes has reap off benefits for other sectors in the economy as they help create employment and also give Delta Corporation negotiating power with the government.

Last but not least, Delta has to invest in green technologies that are friendly to the environment. It has to continue to improve its processes to make sure that they have a lesser carbon footprint in line with the sustainable development goals. This overall will improve the corporate image and see it exhibit corporate leadership and good corporate governance whose trend around the world now incorporates issues to do with ESG-Environment, Social and Governance. This is because investors have in recent years shown interest in putting their money where their values are (Investopedia, 2022)

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