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Authors: Ben Bennett, Aurelie Bechoff, Victor Anihouvi, Zo Lalaina Rajaokarivony, Danielle A Doll Rakoto, Vistor Jeannoda, Janvier Kindossi, Joseph Hounhouigan, Nicolas Ayessou, Cheikh Ndiaye, Ana Pintado and Mady Cisse

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Summary

This report summarises research into the marketing and regulatory Opportunities and including value chains of a group of three animal based traditional African foods, ‘Lanhouin’, ‘Kong’ and ‘Kitoza’. It constitutes one of six reports that review the market for these traditional foods in certain European and African markets using value chain analysis as part of the European Union funded project the African Food Tradition Revisited by Research (AFTER).

The three products considered here are:

- Lanhouin, a fermented fish product used as a flavouring agent in Benin;
- Kitoza, a smoked beef/pork product from Madagascar; and,
- Kong, smoked catfish made in Senegal.

The purpose of this report is to understand all aspects of the marketing and regulatory constraints and opportunities for these food products and to use this information to guide food businesses who may, in future, decide to supply re-engineered African traditional foods made from meat and fish in the EU.

With respect to market access the key findings of the report were that, whilst all the meat and fish products reviewed have market access in the EU, significant investment will be needed in the supply chains of the respective products to maintain access (Lanhouin and Kong) and to gain access (Kitoza). The high cost of private standards in the meat and fish sector represents a serious impediment to market access, particularly for small scale producers of Group 2 products.

The market for AFTER products in the EU can be broadly divided in to two sub-markets: the African diaspora and regular, mainstream, food markets. The diaspora market looks promising, especially in France and the United Kingdom, but, in the long-term, the size of this market is expected to diminish.

With regard to the mainstream food market, review of similar products on the market to existing AFTER foods suggests that Group 2 products all have pre-existing parallel products available in the EU – mainly in specialist niche and gourmand market sectors.

Analysis of the market mix for typical re-engineered AFTER products suggests starting price points for future product by product business analysis and points to major traditional food trade fairs and niche markets such as the specialist restaurant trade as the key market entry point.

SWOT analysis of a range of AFTER re-engineered products shows that there are good market spaces available for AFTER Group 2 products provided market access to the EU can be achieved at a viable cost.

The main findings by product are:

Lanhouin. Market research suggests that a gourmet seasoning product made from Lanhouin could have real potential in France, Portugal and the UK.

Kong. A re-engineered Kong product meets a niche (but currently growing) diaspora market need. As it stands, Kong will probably not out-compete other similar, but easier to eat, smoked fish products in the target EU markets.

Kitoza. There is no noticeable difference in European consumer preference between Kitoza made of pork or beef.

A strongly positive price relationship exists in the consumers perception between Kitoza and its exotic origin.

1. Introduction

This report considers the factors that influence market access for re-engineered traditional foods from Africa. The products under investigation are Lanhouin, Kong and Kitoza which together form ‘Group 2’ of the range of African food products being researched by the project. These products are being investigated as part of the European Union funded project “The African Food Tradition Revisited by Research” (AFTER). The report contributes toward the objective of Work Package 5.

The purpose of this research was to clarify the barriers to market access for this group of re-engineered foods and to suggest possible pathways for businesses to take up the opportunities afforded through market research.

The research framework was two directional involving in-country research (interviews and literature searches) in the producing countries to identify the range of existing products, and, using these product categories, a review of existing market access barriers that might impact on export of these products to the European Union (EU). The focus on the EU is because of an expectation that ‘re-engineered’ AFTER products will partly focus their marketing efforts on these markets. A series of country reports complement this work. The reports scope includes for example, private, public, standards, regulations, rules etc.

The research framework included a review of the re-engineered AFTER products against existing market access rules for the EU, as well as application of a number of analytical tools. These included, working with the research partners to develop marketing plans (e.g., ‘marketing mix’, ‘SWOT Analysis), application of a survey instrument to a sample of key informants in the partner EU countries, and the use of Check-All-That-Apply (CATA) sensory analysis to assess consumer acceptance (Kitoza only – in Portugal). In addition, a set of promotional fiche have been developed using the research, knowledge of African partners and understanding of the possible EU markets. These fiches’ give basic product information targeted at possible EU based buyers in key identified markets.

1.1 Report layout and scope

This research is presented in three sections. First we define the product and their re-engineered forms. Then the base case for re-engineered products is considered. This work was done at the beginning of the AFTER research period to guide re-engineering efforts. This is followed by a review of the market entry requirements to identify constraints and opportunities for AFTER Group 2 products.

A review of the regulatory environment conducted earlier in the AFTER project showed that market access to the EU for a re-engineered Kitoza product using meat produced in Madagascar would not be possible within the timeframe of the project. Therefore this report focuses on two fish based products, Lanhouin and Kong, where market access is feasible in the short term. Notwithstanding, the report does include data from the consumer acceptance study on Kitoza in Portugal (deliverable 5.4.2) as this was available to the research team.

1.2 Methodology

To address the question of market access to the EU for re-engineered fish-based African foods, it was decided to use a range of research techniques and lines of enquiry.

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A review of the target EU countries (United Kingdom, France and Portugal) was conducted to identify whether any existing trade in these traditional products was on-going and where there was what could be learned from that trade.

The AFTER Team worked together to develop a series of product SWOT analyses to understand the re-engineering potential of the products better and to highlight possible points of research entry.

A survey instrument was developed (see Annex 1 – survey guide) and applied to a sample of respondents in the target market segments. A total of 16 interviews were conducted and a series of separate reports prepared (see Annex 2).

A case study approach was used based on guide questions and using a purposive sample of different types of food retailers, wholesalers and market outlets in the three target countries, France, Portugal and the United Kingdom. The case study sample for this group is shown in Table 1.

Table 1: Location and number of case studies

Product	Country			Total
	France	Portugal	United Kingdom	
Lanhouin	7	-	1	8
Kong	7	-	1	8
Total	14	-	2	16

In addition, this report draws upon a Kong market study commissioned by AFTER (Coulange and Gauthier, 2013).

Data from European consumers on the re-engineered products collected elsewhere in this work package using was interrogated to highlight the issues that consumers have with these products. A limited number of questions were added to the consumer acceptability research for Kitoza.

Finally, the market entry requirements for the identified re-engineered products were reviewed and are summarized here.

Outputs from the research include:

- ‘Market Profiles’ or ‘Fiche’ designed to be ready to give to potential European market actors with an interest to distribute the products (see Annex 3).
- Market research aspects of Kitoza from the perspective of the consumer.
- The results of specific French market research for Kong (Coulange and Gauthier, 2003)
- Sixteen specific market studies for products in EU countries based on market interviews with key actors (see Annex 2).

2. Product Description

The meat and fish group of the AFTER Project consists of three traditional fish and meat products. These are:

Lanhouin, a fermented fish product used as a flavouring agent in Benin.

Kitoza, a smoked beef/pork product from Madagascar; and,

Kong, smoked catfish made in Senegal.

For Lanhouin and Kong there is a small existing trade to the African diaspora, particularly in France, where Kong can be found in most African goods outlets.

This report looks at the market access opportunities for AFTER re-engineered meat and fish products. A decision was made that due to the lack of clarity on important market access issues like intellectual property and freedom of entry for meat into the EU from areas that are non-compliant (i.e., all but certain specific export zones in Madagascar), that Group 2 would not include Kitoza for the EU market. Re-engineering for Kitoza will focus on the domestic market opportunities (see AFTER Deliverable 5.1.1.2.2).

Lanhouin and Kong are described below in Table 2. Detailed marketing ‘fiche’s are attached at Annex 3.

Table 2: Summary of key product facets

Facet	Lanhouin	Kong
Profile	Fermented fish condiment/ specialist gourmet food ingredient	Smoked whole fish
Properties	Strongly fish flavoured, food safe, well labelled	Smoked, whole fish (including bones), food safe, well labelled.
Target consumer	Specialist gourmet food outlets and wholesalers	African diaspora wholesalers and retailers
Place	Next to other specialist food condiments and flavours.	African diaspora wholesalers and retailers
Packaging	Vacuum packed small 10- 30g ‘pieces’.	Vacuum packed whole fish pieces
Price	Un-priced in EU	€12.50 – 20/kg

The key properties/formats of the re-engineered Group 2 meat and fish products are:

- Lanhouin – food safe, vacuum packed gourmet food ingredient.
- Kong – food safe, vacuum packed smoked African fish for the African diaspora

Photos of the re-engineered products are provided in the marketing fiche at Annex 3.

3. Possible market segments for re-engineered products

This section considers the potential market segments for AFTER Group 2 products using a series of tools including: the market mix, a framework that helps understand the market offer and SWOT analysis, a review of the competitive environment for the products.

This work was a before and after ‘snap-shot’ with the market segment research being conducted before the application of the field survey of potential consumers of the products. The section has been split into diaspora and non-diaspora segments because these both have potential, but are distinct.

3.1 The Non-diaspora market segment

The European fish sector continues to increase in value and volume with consumption of 12.3 million tonnes of seafood products worth Euro 52.2 billion in 2011 (EUMOFA, 2014). Per capita consumption is fairly stable at 24.5kg in 2011. Roughly 25% of this fish is from aquaculture. The most dynamic demand sub-sector is for shrimps and salmon. Prices for seafood are rising faster than other food product sectors.

There are strong regional European variations in demand and consumer acceptance of salted, smoked, fermented and dried fish. Eurofish (2009) suggest that some key smoked and dried sectors are growing (e.g. salmon and salted cod), whilst other low value traditional smoked products are in decline, for example in Italy. Little research is available on the size and scope of these specialist fish sub-sectors, but all commentators agree that demand for high quality, well presented specialist eco-labelled products is relatively in-elastic. Fish was traditionally a cheap food in most of Europe, but is not, due to supply factors, relatively more expensive, particularly at the specialist, high-end.

A very small proportion of the EU smoked fish market is supplied from imports. In the smoked fish sector, for example, only about 10% of the Community market is supplied from outside, though a recent increase in Turkish smoked trout imports is the exception to this rule.

Dried fish, particularly cod, is mostly imported into the Community. Most specialist dried fish products of the type that might compete with Lanhouin are traditional and geographically designated. The very high price of these specialist niche market dried fish products seems to have promoted the possibility of counterfeit products in recent years. This is managed by elaborate branding and packaging.

Lanhouin

In Benin, Lanhouin is largely used as a relish or food enhancer for other dishes. It has a distinctive flavour of fish. Similar fish sauces are common in Asian cuisine and are widely sold as complementary goods in supermarkets and specialist stores for home production of exotic dishes. The absence of complimentary African food ingredients makes selling Lanhouin on its own a challenge. Outside the diaspora market there is no obvious market entry point.

Kong

Smoked whole fermented fish products are largely unknown in Europe. There are numerous high quality smoked fish products available (e.g. herring, salmon, trout, carp and sturgeon) with distinct marketing channels. Most of these are sold chilled as either loose product or in pre-packed vacuumed sealed units. Fish in Europe is sold as a separate product line in a distinct area of

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supermarkets or from specialist fishmongers. The numbers of fishmongers is declining. Fillets have a much larger market share than whole fish. Smoked catfish were the least preferred smoked fish product in a recent survey of consumers in the USA¹.

Per capita fish consumption in Europe continues to decline, despite significant evidence to support the health benefits of regular fish consumption. In particular, the youth market for fish has collapsed. To counteract this, processed fish products or fish ready-meals have been made to overcome the desire to have fish that is ‘easy to eat’.

The specialist, gourmand fish sub-sector tends to be supplied by wholesalers who provide the retail and service sector with hard to find, often ethnic or geographically specific, food ingredients. In the UK, for example, specialist ingredients with short shelf-life are only stocked by supermarkets if the product has a high turn-over. This offers a niche in the market for actors who provide the ‘hard-to-get’ ingredients for chefs and individuals who are willing to experiment with exotic cuisine.

Evidence across Europe suggests that consumer demand for the unusual, novel and exotic is growing. The availability of hard-to-find ingredients on-line and the huge push for chef-led recipes has promoted new opportunities for novel cuisine and experimental dishes.

3.2 Diaspora market segment

The EU African Diaspora – some key facts:

- 1.74 million migrants from sub-Saharan African in 2005²
- 763,000 (44%) were from West Africa; 500,000 (29%) were from East Africa, 284,000 (16%) from Central Africa, 138,000 (8%) from Southern Africa³
- The most important migrant sources are: Nigeria, Ghana, Senegal, Somalia and South Africa (7-9% each)
- Other significant groups (2-5% each) are from Cameroon, DR Congo, Zimbabwe, Cote d’Ivoire, Angola, Mauritius, Cape Verde, Congo, Mali and Ethiopia.
- UK and France have over half a million migrants from sub-Saharan Africa each
- Other important destinations are Italy, German and Portugal.

Possible entry points into the Diaspora market include:

- Diaspora associations
- Faith based diaspora organizations (churches)
- Diaspora based social media

In Europe, Kong is presented to the consumer either in plastic bags or open for the customer to choose an individual piece. It is not uncommon to see Kong sold in Paris as a street food with customers haggling with traders within a price range of €3 - €5 per ‘piece’.

¹ Dasgupta S, Greene J, Onders R, and Mims S, ‘Buyer Preference of Smoked Freshwater Fish: a Statistical Analysis’, Kentucky State University, World Aquaculture Society www.was.org

² see World Bank, (2007) ‘Concept Note: Mobilising the African Diaspora for Development. [www.wohttp://siteresources.worldbank.org/INTDIASPORA/General/21686696/conceptnote.pdf](http://siteresources.worldbank.org/INTDIASPORA/General/21686696/conceptnote.pdf)

³ Following figures from IOM (various years)

The key actors in the EU meat and fish markets are shown in Table 3 below.

Table 3: Fish value chain typology of actors

Actor	Role
Fisherman	Catches, cleans and chills fish to EU standards
Fish auction	Brings together fishermen and fish wholesalers
Fish wholesaler	Buys a range of fish at auction and sells to caterers, fishmongers or processors
Restaurant	Buys fish from fish auctions or wholesalers and sells to customers
Processor	Buys fish from fishermen or auctions and makes finished fish products for supermarkets
Fishmonger	Buys fish at auction and sells to consumers
Supermarket	Sells fresh, chilled, packed and ready-meal fish products to consumers
Consumers	Buys fish from fish mongers or supermarkets

The markets for high value specialist fish products, such as smoked and fermented fish are a little differentiated. It can be seen that, where there are diaspora markets for Lanhouin and Kong these tend to be for relatively low value added, poorly presented ‘traditional’ products that meet the expectation of a consumer with previous experience of retailing in African open markets.

3.3 Marketing Mix

The marketing mix is a framework for trying to understand the key element of a potential market offer. In this case, each AFTER product is reviewed against a series of criteria. Product defines what possible products are being considered in the analysis. Price looks at the likely sales price of the product compared with possible competitors in this market space. Place suggests where in the market consumers from that market segment might want to buy the product. Promotion suggests how that consumer profile might want to learn about the product. Finally, ‘people’ suggests the likely consumer profile for that product. When launching a new product, it is theorized that a firm has a choice of investing in setting a lower price than the competition, heavily promoting the product, making the product better than the competition or trying to get the product into a particular market place that is attractive to the sort of people interested to consume that product.

Price in this analysis is ‘point of sale’ price. A general rule of thumb is that the point of sale price of a product is x2 the wholesale price, which in turn is likely to be 30% higher than the landed export price. These high margins reflect ‘normal’ overhead costs incurred in wholesaling and retailing in the EU. They can be avoided with direct markets methods.

We consider here both the diaspora and the non-diaspora market as there seems to be potential cross-over between these segments.

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Figure 1: Marketing mix – Group 2, Diaspora

<u>Product</u> a) Improved, food safe, well presented Lanhouin as a traditional food ingredient for the West African Diaspora b)Kong as food-safe, well presented, pre-packed whole fish.	<u>Price</u> a)XX b)XX
<u>Place</u> a) Diaspora mini-markets in Paris and large French cities b) Diaspora mini-markets in Paris and large French cities	<u>Promotion</u> a) Specialist diaspora distributors b) Specialist diaspora distributors
<u>People</u> More quality conscious middle class diaspora consumers.	

Figure 2: Marketing mix – Group 2, Non-Diaspora

<u>Product</u> a) Lanhouin as specialist food ingredient/condiment (similar to Thai fish sauce or Anchovy paste) b)Kong as an exotic, pre-packed whole fish	<u>Price</u> a)Fish sauce in a bottle retails at €6-8/l. Fish paste made from Anchovies sells for €4.50/100g. b)Salmon sells at the top end for €5/100g (e.g., hand fed).
<u>Place</u> a)Specialist delicatessen and online b)Specialist delicatessen and online	<u>Promotion</u> a)Start at specialist fisheries trade fairs b)Start at specialist fisheries trade fairs
<u>People</u> The type of person prepared to experiment with exotic meat and fish products is likely to be a gourmand interested in unique flavours and eating experiences combined with an interesting back-story.	

Analysis of the market mix for diaspora and non-diaspora markets suggests some important differences between Lanhouin and Kong. Key findings are:

- Lanhouin demand will probably not be greatly increased by targeting an improved product at the diaspora sector
- Presentation of an improved Lanhouin product to the specialist gourmand market looks very promising.
- The market for improved Kong is currently unsupplied, but a premium for the new Kong product vs the traditional one is uncertain.

3.4 SWOT

The purpose of SWOT analysis, done prior to and informing the re-engineering decisions, was to assess products against their likely competitors. The SWOTs chosen are taken from the marketing mix analysis in the previous section. For each group a SWOT for a diaspora product and one for a possible re-engineered product were done.

Figure 3: SWOT of Group 2 – diaspora product

Strengths <ul style="list-style-type: none"> • Products well known and demanded by diaspora 	Weaknesses <ul style="list-style-type: none"> • Easy to reproduce facsimiles within EU • Product safety a concern of consumers • Many cheaper and similar EU products
Opportunities <ul style="list-style-type: none"> • Senegal diaspora very large in France • Branding as a 'safe' food 	Threats <ul style="list-style-type: none"> • Copies (e.g. Kong) from cheaper sources • Decline in demand for diaspora products over time

Figure 4: SWOT of Group 2 – traditional Kong

Strengths <ul style="list-style-type: none"> • Strong flavour 	Weaknesses <ul style="list-style-type: none"> • Dark appearance not to everybody's taste • Catfish less favoured than marine fish
Opportunities <ul style="list-style-type: none"> • Good market for specialist gourmand smoked fish 	Threats <ul style="list-style-type: none"> • Cheap smoked fish products available in EU

This analysis suggests:

- Certification of origin and branding will be important for both Group 2 products
- Kong is likely to be very sensitive to the price of competing, less bony, fish in the smoked fish non-diaspora segment

In summary, the SWOT analyses show that there is potential for developing re-engineered Lanhouin and Kong. The international strengths of Lanhouin as a product favour it against its competition compared with Kong, particularly in the non-diaspora market.

4. Market opportunities in target EU countries

This section summarizes the results of the questionnaire interviews and case studies (see Annex 1 and 2) with the aim of highlighting the appropriate market location, format, price and entry strategy for the target products and geographies. A whole range of guide questions were used aimed at understanding how different target market segments might respond to re-engineered products. These findings are summarized by here.

4.1 Lanhouin

Product

High quality seasoning product.

What kind of consumer will buy this product and why?

Experimental home chefs interested in novelty and high quality taste experiences. A typical consumer would regularly watch TV chefs, buy recipe books and visit high quality restaurants.

What products are in the same marketing space?





There are a few specialist, fish based, condiments available in the market such as Bottarga from Italy made from fish roe, and Bacalao from Spain and Portugal, made from dried salted cod. Most competing products in this space are specifically associated with a cuisine, such fish sauce and Thai cuisine. For Lanhouin, the absence of a cuisine to ‘hang’ onto suggests that a more generic approach to marketing it as an excellent fish based condiment and stock enhancer on its own might be best.

Some interviewees, familiar with fermented fish from West Africa, mentioned ‘Guedj’ from Senegal and ‘Momone’ from Ghana as competitors⁴. Traditional users of these condiments differentiate between them. Potential European users would struggle to understand the difference.

⁴ For a description of some of these different fermented fish products from West Africa see Anihouvi et al, 2012.

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Figure 5: Examples of products that may compete with Lanhouin

Product	Example	Uses	Source
Bottarga		Condiment	Sicily Www.gourmetsleuth.com
Bacalao		Dish and condiment	Portugal www.foodsfromspain.com
Thai fish sauce		Condiment	www.bluedragon.com
Fish paste		Snack and flavour enhancer	www.waitrose.com

Interviewees suggested that the specialist, gourmet, fish stock sector would be an excellent market opening for Lanhouin.

What format would the consumer like?

Small pieces or cubes that could be grated into a stock or soup are preferred. A format of either single piece or three pieces in a pack (like stock-cubes) was preferred.

How important is shelf-life?

Shelf-life is considered important because this type of product is ‘slow-moving’. One major delicatessen said that they might only sell 2 units of fish stock a week, so would need to hold stocks for a long time.

Place

Specialty food shops. Probably not in supermarkets unless they are large enough to have a bit specialty section.

Specialist food shops say that they like to stock this kind of product because it complements other goods. So, for example, in the key pre-Christmas sales period, stocking high value condiments near to the fresh fish area of the shop combined possibly with fresh recipes, is a common and successful strategy (along the lines in the UK of stocking very expensive goose fat near to the Christmas turkeys).

Price

What price would the typical consumer pay?

Owners of specialty food stores seemed to think that Lanhouin pieces as a gourmet ingredient could (and should) sell for a high price. A small piece for just under Euro 5 would probably work.

In the African food sector, the retail price of Lanhouin is likely to be lower – several respondents said a small piece should be Euro 2 for example. Three large ‘pieces’ could sell for Euro 6.

Promotion

Initially, respondents recommend that a Lanhouin condiment product be targeted at high-end restaurant suppliers. One suggested that the Japanese restaurant market would particularly like this product.

Most (but not all) agreed that a brand name is important. In France it was felt that an African brand would be acceptable. In the UK this was not considered important.

4.2 Kong

Product

Vacuum packed, smoked, frozen whole catfish.

What kind of consumer will buy this product and why?

Most respondents thought that the only market for re-engineered Kong would be the diaspora sector who are familiar with the challenges of eating the product.

What products are in the same marketing space?

A number of respondents mentioned existing supplies of ‘improved’ Kong that is frozen and presented in a vacuum pack. Sources from the UK and the Netherlands were mentioned but no address is available. These products do not sell well and it was speculated that this was because the smoking is too ‘light’. A dark smoked product is expected by regular consumers.

Kong competes with loose smoked Barracuda, tilapia, hogfish, mackerel and sardines.

What format would the consumer like?

The consumer wants a dark product of medium size. Several interviews mentioned that it should not be too large.

Being able to inspect the product prior to purchase is essential – so transparent packaging.

How important is shelf-life?

Actors in the Kong value chain expect a long (at least 3 weeks for frozen Kong) shelf-life.

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Place

Most respondents expected to find this product in the freezer section of African food stores. An improved product might, if well presented, get space in specialty epicure outlets.

Price

What price would the typical consumer pay?

Frozen traditional Kong sells for under Euro 20/kg in period of peak demand but can fall to Euro 15/kg.

Coulange (2013) confirms that most smoked fish available on the diaspora market trade between the range of Euro 15 to Euro 22 with Kong normally falling in the middle of this range.

Promotion

An improved Kong product would need to clearly explain its beneficial properties to the consumer and differentiate itself from other Kong products available in different forms.

4.3 Summary – opportunity in target European markets

Coulange (2013), estimated the total French and United Kingdom annual market for West African dried fish to be more than 500 tonnes or more than USD20 million. The majority of this comes from Nigeria. A high proportion is not Kong or Kong like (e.g., tilapia, pangasius and Nile perch all fall into this category).

Typical stores selling Kong (e.g., in Paris) transact 50kg to 300kg a month. A wholesaler can move 15mt a month.

The African diaspora retail trade in Europe is rather concentrated into city zones reflecting populations from specific origins. Small ‘groceries’ and general stores in these zones are supplied by a limited number of specialist wholesalers.

The gourmet sector tends to be associated with higher income retail zones, often related to retail ‘experiences’, for example, in the UK, around special ‘farmers markets’, commonly on the edge of urban areas with sufficient parking and in attractive surroundings (e.g., reclaimed older buildings). This specialist food market is also served by specialist exotic foods wholesalers.

5. Results of additional questions added to the Consumer Acceptability research - Kitoza

Notwithstanding the decision to exclude Kitoza from the overall market and consumer acceptance studies in the European Union for practical and regulatory reasons, some blind tasting of Kitoza was conducted in Portugal under Deliverable 5.4.2. Some marketing questions were added to this research and the results are reported here.

The questions addressed were: which retail outlets might they expect to find Kitoza made from beef or pork being sold; how consumers might consume Kitoza (i.e. as an appetizer or as a snack); how much consumers might be prepared to pay for Kitoza as opposed to a similar product more familiar to them; and, what influence the origin (e.g. from Africa) might have on their consuming decision.

Kitoza products sensory profile and consumer acceptance tests were conducted in Portugal. Two smoked Kitoza samples (beef and pork) and a traditional Portuguese smoked loin sausage was used for comparison.

5.1 Method

Participants were non-probabilistically recruited in Portugal (Porto, n=94), according to their willingness and availability to participate in the study. Consumption attitudes were also analysed, 65% of participants consume different types of charcuterie at least weekly. Their ages ranged between 18 and 55 years old (average 29); 99% were European.

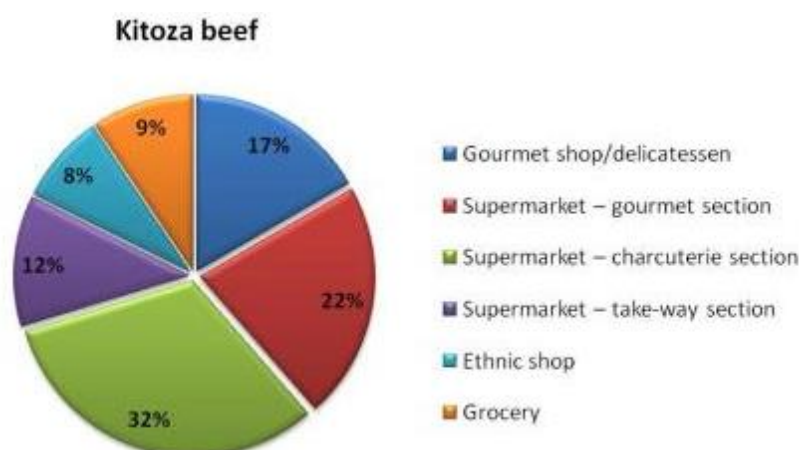
Sample acceptability was assessed by overall liking ratings provided on a 9-point hedonic scale. XLSTAT (Addinsoft) software was used to analyse data.

5.2 Results

Outlet most appropriate for Kitoza

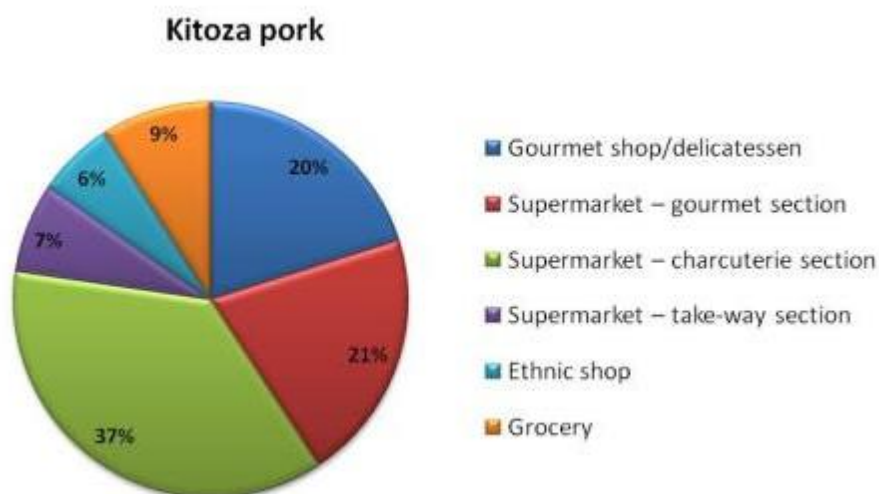
Participants were asked to indicate the shops that considered suitable for the sale of Kitoza beef and pork. Participants considered for Kitoza beef (32%) and Kitoza pork (37%) that they would like to buy these products in supermarket charcuterie section. Supermarket gourmet section was the second choice. All the results are presented in figures 6 and 7.

Figure 6: Shops those participants considered more appropriate for the sale of Kitoza beef



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Figure 7: Shops those participants considered more appropriate for the sale of Kitoza pork

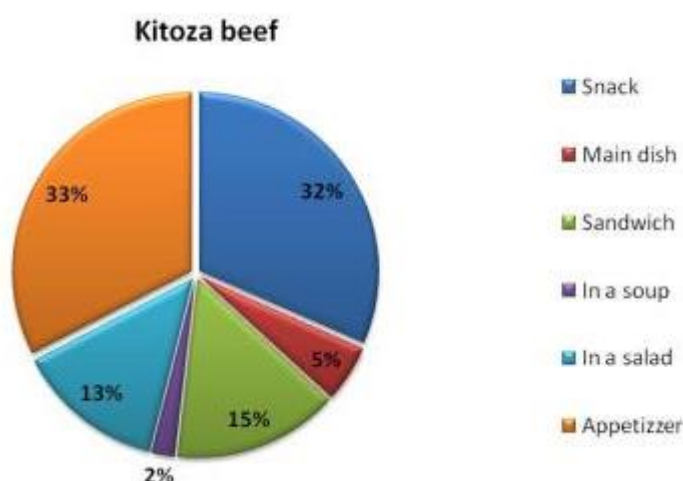


These results showed that as the participants were unfamiliar with this kind of products, probably they connected the ideal market with the kind of market where Portuguese charcuterie products are also marketed namely supermarkets charcuterie sections. On the other hand participants considered these products as delicatessen or exotic, hence the gourmet shops were other major choices.

Preferred consumption option

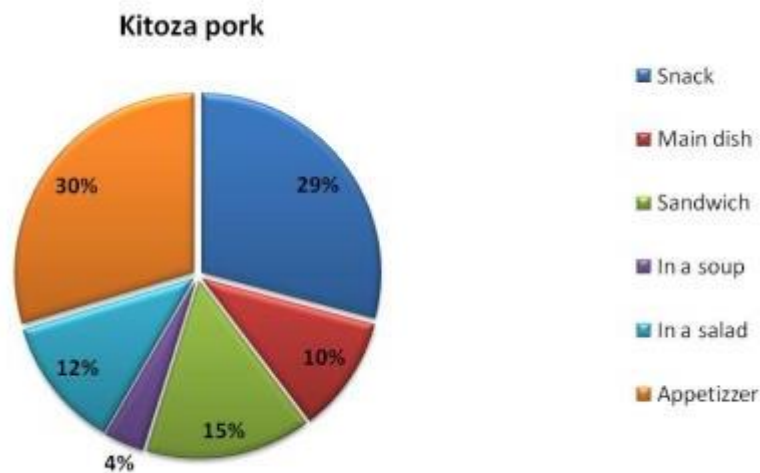
The Figure 8 and 9 show how participants would like to consume kitoza beef and pork. The results were similar for both Kitoza products, being the main consumption preference as an appetizer and as a snack). These are also the main forms of consumption of traditional Portuguese charcuterie.

Figure 8: Types of consumption for Kitoza beef



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Figure 9: Types of consumption for Kitoza pork



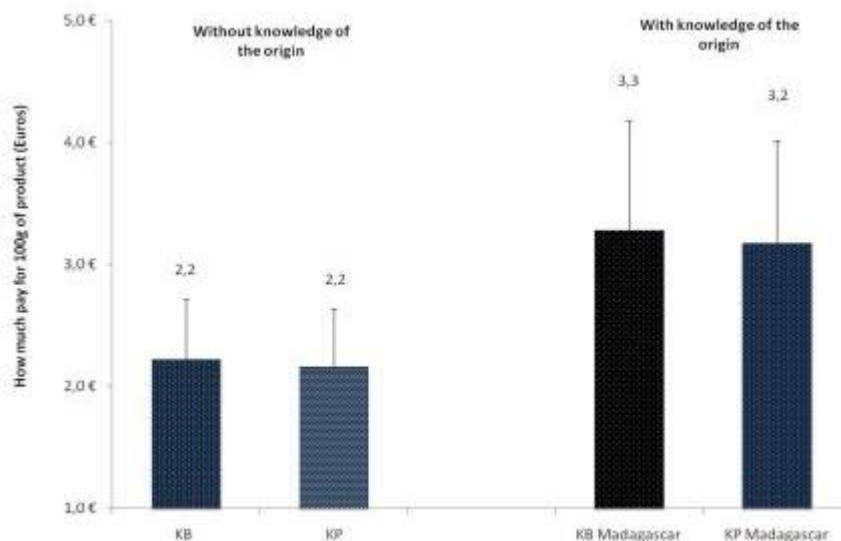
There is no noticeable difference between Kitoza of beef or pork.

Willingness to pay and influence of origin

To assess whether the country of origin could influence the price consumers were willing to pay for the product half participants were informed that Kitoza beef and pork were prepared according to a traditional recipe from Madagascar and then they were asked the price they were willing to pay for the products. To the other half no information about the recipe was given.

The study showed similar results for Kitoza beef and Kitoza pork (Figure 10). Participants answered that they would pay a higher price when the origin of the recipe (Madagascar) is known, on average 3.3 €/100g for Kitoza beef and 3.2 €/100g for Kitoza pork. When the origin of the products is not taken into account, the results show that participants would pay on average 2.2 €/100g for both products.

Figure 10: Results for Kitoza beef and pork Kitoza when participants were willing to pay (Euros) knowing and unknowing the origin of these products.



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Notes: Mean comparison using t student's analysis, compared prices using Kitoza beef with and without indication of Madagascar origin; main price indicating Madagascar origin higher ($p \leq 0.01$). Comparing prices using Kitoza pork with and without indication of Madagascar origin – main price indicating Madagascar origin higher ($p \leq 0.05$)

A positive price/origin association is suggested by these results. Possibly, these results can be explained because participants associated these items with exotic products, thus their expectation of a higher price.

6. Market entry requirements

This section considers the regulatory requirements for the AFTER meat and fish based re-engineered products proposed for the EU market.

6.1 The regulatory landscape

The food safety of the European citizen is the paramount objective of both public and private regulation and standard setting in the EU. AFTER products have to comply with these existing market norms. Products have to be safe for European consumers and this has to be actively demonstrated (e.g., the onus is on the producer to prove that food is safe to eat and to maintain that safety in the chain).

The degree to which a particular market is regulated depends on a number of factors including: the nature of the product itself, the place where it is produced and the type of end market use that it or its derivatives might have.

Some retailers in the EU applied higher, more stringent, private standards⁵.

Having said this, the EU market is huge (the food manufacturing industry has a turnover of Euro 917 billion, agricultural exports are over Euro 90 billion and agricultural imports even higher than this) and potentially lucrative. Many thousands of African food businesses small and large successfully comply with the regulations and sell profitably to a range of different sectors in the EU. The import of fresh fruit and vegetables is a good example. However, examples of African processed foods being imported to the EU outside the diaspora market are far less common. The section that follows highlights the regulatory and compliance hurdles that need to be overcome by food businesses in third countries aiming to export re-engineered AFTER products to the EU.

The key product affected by these locational issues is meat. For meat, freedom from key transboundary diseases of the area of production has to be proven before exports can start and achieving this requires a veterinary management regime.

⁵ See for example www.globalgap.org

6.2 EU market rules

This section is sub-divided into two main areas: public standards and private standards. Public standards are often mandatory whereas private standards are voluntary, and therefore not subject to the disciplines of the WTO. Finally, consideration is given to marketing ‘norms’ in the EU.

6.2.1 Public standards and the EU

To import products for human consumption into the EU the importer must comply with regulations on hygiene, safety, labelling and food composition. In addition you have to ensure that all the packaging complies with EU rules on packaging. There are special rules for products of animal origin (POAO) and specialist foods (e.g. functional foods, herbal remedies, food supplements)⁶.

The key laws, regulations and standards that might impact on market access for AFTER products in the EU are:

a) Environmental safety – sanitary and phytosanitary regulations

To prevent entry and spread of disease and pests into the EU importers have to comply with regulations to manage the associated risks. For the EU this means complying with the plant and animal health regulations and demonstrating this by issuance of a sanitary or phytosanitary certificate from the national Competent Authority.

See: <https://www.ippc.int/IPPC/En/nppo.jsp> and http://europa.eu.int/eur-lex/en/consleg/pdf/2000/en_2000L0029_do_001.pdf

You can find the content of a typical phytosanitary certificate on the IPPC website (www.ippc.org)

b) EU General Food Law (EC 178/2002)

The general principals of the EU Food Law are that food must be proven **safe** for human consumption from the point of production to the point of consumption (“farm to fork”). The **labelling** and presentation of the food must not mislead the consumer. The food must be fully **traceable** from point of production, and, any food found to be unsafe must have a system for its **recall**.

Food can also be rejected if it is unfit. This means that it is unacceptable due to contamination, presence of foreign objects, odour, putrefaction or decomposition.

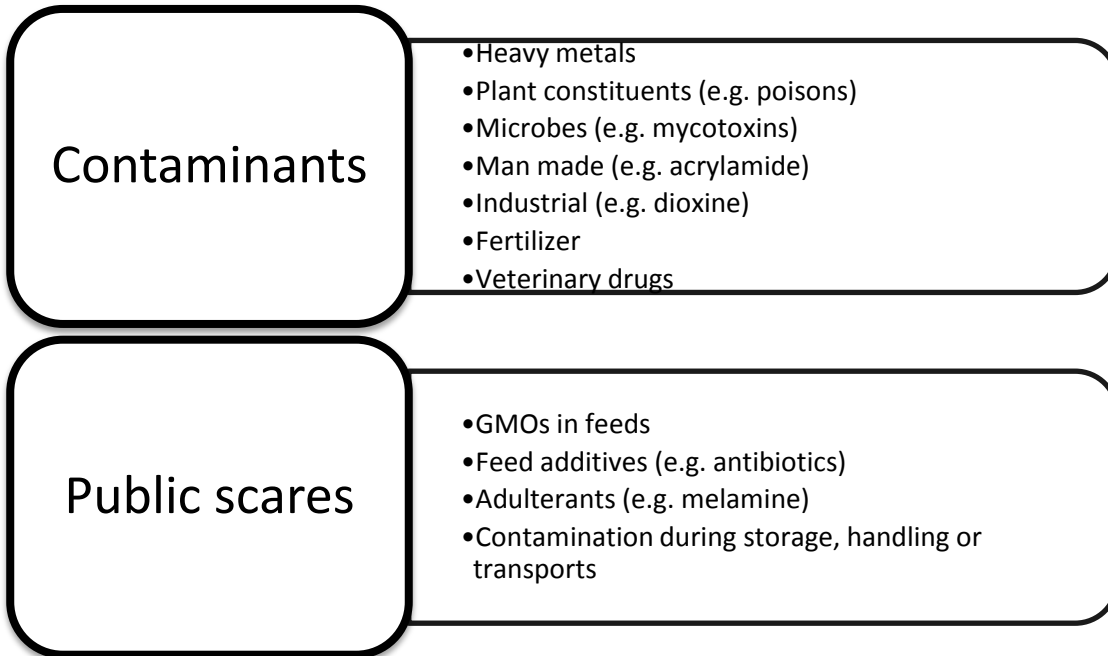
The EU regulation 178/2002 harmonizes all regulations for feed, food and food of animal origin. Specific regulations exist for food (852/2004), feed (183/2005), and food of animal origin (853/2004). The official control measures for food and food of animal origin are given in EC 2074/2005 and detail of the microbial limits can be found in EC 2073/2005. National regulations of EU members are all harmonized with the EC regulations, but importers should be aware that differences do exist between the EC regulations and the way that individual EC members apply their national regulations (for example, some are more rigorous than others).

⁶ The EU and UK Food Standards Agency websites have clear advice on how to comply

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EC regulations focus on risks to the consumer. There are two main sources of these risks: contaminants entering the food chain and, even more powerfully, public concerns about safe food resulting from scares and outbreaks. These are summarized in Figure 11.

Figure 11: Drivers of EC Regulations



Source: Author

Issues to note:

- This applies to one-off sales and samples
- It applies to all scales of businesses (small and large)
- Problems with part of the batch apply to the whole shipment

Traceability under the EU General Food Law

- All food (and animal) suppliers must be identified
- All business to which products are supplied have to be identified
- All this information has to be produced to the Competent Authority on demand
- Nb: This does not include veterinary medicines, pesticides, fertilisers or seed (unless the seed is to be consumed directly)
- It has to be possible to recall all the product if necessary
- As a minimum, traceability records should include the address of the customer or supplier, nature and quantity of products, and the date of the transaction and delivery
- Also record the batch number or durability indication (where applicable).
- It is the information (records) that matters not the traceability system as such.

In addition there are specific rules/requirements for certain sectors

- Cattle registration and identification is mandatory
- Consumer information for fish and fish products at point of sale

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- Within a business cross-traceability is not required. So how batches are split and combined within the business to create the final product is not necessary.

Nb: See (UK 2007), “Guidance Notes for Food Business Operators on Food Safety, Traceability, Product Withdrawal and Recall” at <http://www.food.gov.uk>

c) Products of Animal Origin and the OIE Terrestrial Code

Meat products, fish, poultry and dairy products require prior approval of the public health condition applicable in the country before import into the EU. To export these products to the EU a country must be on the EU positive list.

Senegal is on the positive list for fisheries products and has 114 approved establishments (see list at https://webgate.ec.europa.eu/sanco/traces/output/FFP_SN_en.pdf)

Benin is on the positive list for fisheries products and has 3 approved establishments (see https://webgate.ec.europa.eu/sanco/traces/output/FFP_BJ_en.pdf)

There is an important and contentious difference between the global meat and meat product rules applied by the OIE and those applied by the EU. The OIE requires the country exporting to meet stringent standards for management of contagious diseases such as Food and Mouth. However, the OIE Terrestrial Code has the possibility of setting up disease free zones or supply chains as long as proof of absence of disease is available and veterinary control is demonstrated to the required (very high) level. The EU requires that products exported to the EU come from specific approved premises as well as complying with OIE public health conditions. Note that this applies to fisheries products as well.

For meat and fish, exports to the EU are only allowed from approved vessels and establishments. So abattoirs, fish processing plants and transport has to be prior inspected and approved by the Competent Authority and confirmed by the EU Food and Veterinary Office (FVO) (EU undated). This also means that fisheries vessels must comply with EU hygiene standards and have traceability to the individual fishing vessel.

On arrival in the EU at an approved point of entry the product can be subject to physical inspection. The frequency of inspection depends on the risk profile of the product (rejections or failed inspections = increased risk = more inspections).

The process for approval of a new export country/products is as follows:

1. The national authority of a third country must submit a formal request to the Directorate-General for Health and Consumer Protection of the European Commission to export fish, fishery products or bivalve molluscs to the EU. The request should contain confirmation that the authority can fulfil all relevant legal provisions to satisfy EU requirements.
2. The Directorate-General for Health and Consumer Protection sends out a questionnaire which should be completed and returned. Information on relevant legislation, competent authorities, hygiene and many other elements are requested.
3. For aquaculture products, a residue monitoring plan of the exporting country must also be submitted and approved at this stage.

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4. After the evaluation of the paper submission, an inspection by the Food and Veterinary Office may be carried out to assess the situation on the spot. Such an inspection is mandatory for high-risk products like shellfish.
5. Based on the results of the evaluation / inspection, and the guarantees given by the exporting country, the Directorate-General for Health and Consumer Protection proposes the listing of the country, the specific conditions under which imports from that country will be authorised and the list of approved establishments in the country. These are then discussed with representatives of all EU Member States.
6. If the Member States have a favourable opinion on the proposal, the European Commission adopts the specific import conditions. Lists of eligible establishments can be amended at the request of the exporting country and are made available for the public on the internet:
http://ec.europa.eu/food/food/biosafety/establishments/third_country/index_en.htm

For more detail see on the import requirements, controls and rules for hygiene see (EU 2006)

There are currently 18 EC approved fisheries processing plants in Senegal and three in Benin (see ec.europa.eu/sanco/traces/output/BJ/FFP_BJ_en.pdf).

In the last four years there have been regular rejections of fish and fisheries products arriving in the EU from Senegal according to the EU Rapid Alert System for Food and Food (RASFF) (see Table 4). The most common countries rejecting these products are Spain and Italy. A high proportion of rejections were for in-chain issues such as poor temperature control leading to spoilage.

Table 4: Rejections of fish and fish products notified to the RASFF Portal

Country	No. of cases of rejection				
	Year				
	2010	2011	2012	2013	2014
Senegal	15	23	8	5	7
Benin	0	0	0	0	0

Source: RASFF Portal

d) Pesticide residues

Plants treated with pesticides for their protection from pest and plant diseases before and after harvest and subsequently included in food or feed must comply with Maximum Residue Levels (MRLs) set the EC. The relevant harmonized regulation is EC 396/2005. Only approved treatments can be used and updated list is on the Europa website.

Most small-scale production related to AFTER products will be free of agricultural chemicals because small scale farmers cannot afford to use them. Nevertheless, the presence of chemical on farms or in households nearby and the unregulated sale of non-compliant chemicals are common.

The onus to prove the products comply with EU MRLs is on the importer.

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Table 5: MRL risk and AFTER products

Product (local name)	Risk
Lanhouin	Use of chemicals to preserve fish. Storage of fish near to household subject to anti-malarial spraying programmes. Re-use of bags or sacks
Kong	

Source: Author

e) Packaging (EC 1935/2004)

Three types of packaging are needed to ship food: transport packaging (the outer layer for protection during handling), outer packaging (the transit protection such as a box) and the sales packaging which surrounds the goods.

Aluminium is safe except for highly acid foods. Plastics have a limit of 10mg per square decimetre of plastic surface area or kg of food migration. Cellulose, ceramics, seals, coatings, and adhesives are also regulated.

Packaging must not allow constituents to migrate into the food in quantities that could harm human health.

Packaging is potentially an important part of AFTER re-engineering. The EC regulation will need to be taken into account when packaging is chosen if export to the EC is planned.

f) Labelling (Directive 2000/13/EC)

The EU requires certain information on food labels for pre-packed food (food in packaging and/or ready to sell to the consumer)

- A name
- A list of ingredients
- Allergen information
- If GMOs are included
- If irradiation has occurred
- The amount of certain ingredients
- A 'best before' or 'use by' date
- Conditions for storage and use (cooking instructions)
- Name and address of the manufacturer, packer or EC seller

Labelling must be clear and indelible and in the language of the country where the product is sold.

Nutrition information is voluntary unless certain claims are made (such as 'low fat')

g) High risk foods (EC 669/2009)

Certain products are considered to be a high risk to the public because of recent high profile food scares in the EC. These are products which might contain dangerous substances such as aflatoxin or salmonella. These products can only be imported through Designated Points of Entry (DPEs).

There is no particular evidence that any AFTER products fall into this category as yet.

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h) Aflatoxin limits (EC 1152/2009 and 165/2010)

Aflatoxin is a highly carcinogenic substance secreted by a mould. It is one of a number of dangerous mycotoxin that can be found in foods. Its presence in very small quantities is potentially lethal to human and animal health and therefore it is not tolerated in the EU. Aflatoxin limits and sampling arrangements depend on the product.

EU general aflatoxin limits for cereals are:

B1 2ppb

B1 x B2 4ppb

Products from humid climates that are not dried quickly after harvest or which are stored poorly have a greater chance of aflatoxin contamination. Products that which are in contact with soil also have a greater susceptibility to aflatoxin contamination (e.g. groundnuts).

Exporters have to demonstrate absence of aflatoxin in their products before shipment. If the shipment arrives in the EU above the level, the exporter will have to pay for its destruction.

Table 6: Assessment of aflatoxin risk of AFTER products

AFTER Product	Ingredients	Discussion	Aflatoxin risk (low to high)
Kong	Fish	Used fresh	Low
Lanhouin	Fish	Used fresh	Low

Source: Authors opinion

Aflatoxin (and other mycotoxins) are a concern for AFTER and will have to be controlled in finished products but are probably not of great concern to this group of AFTER products.

i) Histamine levels

Certain species of fish are prone to histamine build-up during their decomposition post-harvest. This is dangerous to human health and the EU regulates it. The regulation is EU 853/2004. The key species implicated in histamine contamination are: Scombridae (mackerel, tuna, bonito), Clupeidae (herring, sardine), Engraulidae (anchovy), Coryphaenidae (mahi mahi), Pomatomidae (bluefish) and Scomberesocidae (saury).

The EU limit for histamine in fish and fisheries products is shown in Table 7.

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Table 7: EU histamine controls

Food category	Maximum permitted level of histamine
Fishery products from fish species associated with a high amount of histidine	Nine samples to be taken, of which: the average histamine content must be 100mg/kg or less; no more than 2 samples may have levels between 100mg and 200mg/kg; and no sample may have a level above 200mg/kg.
Fishery products which have undergone enzyme maturation treatment in brine, manufactured from fish species associated with a high amount of histidine	Nine samples to be taken, of which: the average histamine content must be 200mg/kg or less; no more than 2 samples may have levels between 200mg and 400mg/kg; and no sample may have a level above 400mg/kg.

Source: <http://www.seafish.org>

Lanhouin is the only AFTER product that might have this issue and only if it includes the fish species mentioned above.

j) Combating illegal fisheries EC 1005/2008

A catch certificate testifying that the international rules on conservation and management of fisheries resources have been adhered to should accompany all fish imports into the EU. National authorities govern the issuance of these certificates and guarantee compliance.

A key issue for compliance with this regulation is traceability. This could be a major problem for both Lanhouin and Kong.

k) Polycyclic aromatic hydrocarbons (PAH) EC 1881/2006

A high number of the food alerts coming from fish imported in the EU concern toxicity coming from the smoking process, particularly benzo(a)pyrene. A maximum limit of 2 µg/kg was set in September 2014. For traditional smoke Kong this probably makes the majority of product currently being brought in for the diaspora non-compliant.

6.2.2 Private standards

Private standards are those set by the buyer. They are not mandatory, but in some cases, these standards have become so pervasive in the EU that sales outside the standard can be difficult. Companies and individuals can set any standard they want for private transactions – the seller is not obliged to sell at these standards.

With a great deal of value now concentrated in brand names of foods and supermarkets, companies set internal standards in order to protect this investment from the risk of a food scare. In recent years, reputations built up over many years have been lost as a result of contaminated ingredients. Firms manage risk by setting standards, often higher than public standards, for their suppliers. To prevent high standards becoming a source of inter-firm competition, some sectors have combined to

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share private standards, notably the European food retail sector through EurepGap and now GlobalGap standards.

Reviewing the proposed market segments for AFTER grain products, none are proposed for the EU supermarket sector, so private standards do not apply.

Insofar as specialty food outlets are unable to apply private standards (they do not have the market leverage), this is an advantage to the AFTER Group 2 fish products because it makes market entry easier.

6.3 Summary of the regulatory challenges – Group 2

Assuming compliance with basic food safety parameters for ingredients and manufacture, and continued market access for Benin and Senegal for fisheries products to the EU from certified establishments, all AFTER fish products can access the EU market.

Where re-engineered products are manufactured within the EU, compliance with the regulations will be no different from all other foods.

The target markets identified for these fish products are at the lower end of the stringency continuum – meaning that they are tolerant of lack of conformity in hand-made and natural products and do not set especially high compliance levels.

6.4 Compliance based re-engineering

Increasingly, consumers seek reassurance of certain product qualities. In most cases (but not all) they are prepared to pay a premium price for these so-called ‘embedded’ qualities. A brief review is provided here.

6.4.1 Areas of certification

There are many potential areas of certification that could be used for re-engineering. Some are considered here.

a) Environmental products and wild harvesting standards

EU consumers are aware that some products are harvested from the wild and that by consuming them they may be contributing to environmental degradation. To meet this challenge, a number of wild harvesting and forest friendly certification systems have emerged. For wild harvested tree products, EU buyers will require evidence of sustainable harvesting. For fisheries products this is currently less important.

A key element of wild harvesting standards is the establishment of the initial resource and the assessment of how much sustainable harvesting is possible.

For wild harvested products organizing production and producers into cohesive groups that can keep records, organize supply and negotiate with buyers is key to success (UNCTAD 2009).

For fisheries products the key certification system is that of the Marine Stewardship Council (www.msc.org). Neither the Lanhouin nor the Kong fishery is registered under this scheme. The high cost of compliance and the small scale of the potential market probably mean that this is not an economic proposition.

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b) Appellations, geographical indicators and traditional knowledge

The area that a product is produced and the traditional knowhow that is used to make that product can be protected under various international agreements including appellation of origin (under the Lisbon Agreement of 1958), the World Trade Organisation Agreement on Trade Related Aspects of Intellectual Property Rights (TRIPS) and, more recently, the Convention on Biological Diversity (CBD). All these agreements give protection to the intellectual property associated with making traditional foods. However, application of these treaties and benefiting individual and group rights has proved challenging, especially in developing countries. The absence of organized production and associations of interest groups who protect food forms is a problem for traditional foods because no records of production locations or norms (e.g. recipes) exist. Also, without domestic legal infrastructure it is very hard for individuals and groups to apply their rights. Few countries in Africa have yet successfully passed and implemented the necessary laws that allow registration of domestic geographical indicators (GIs) or the mechanisms for protecting and sharing the benefits of traditional knowledge. Access and Benefit Sharing (ABS) legislation is in its infancy in much of Africa and successful stories limited so far. The Nagoya Protocol agreed in 2011 will increase the importance and strength of ABS legislation, but this in turn may discourage investment by third parties who are nervous about how their profits will be shared. A summary of the IP status of AFTER countries is given below in Table 7.

Table 8: IP status of AFTER countries

Country	Treaty, protocol or law							
	WIPO	Signatory of the CBD	Signatory of Nagoya Protocol	ABS law	GI law (and type)			
					Sui generis	Trademarks	GIs	Certification marks
Benin	X	X					X	
Cameroon	X	X			X			
Egypt	X	X				X		
Ghana	X	X	X	X	X	X		
Madagascar	X	X				X		
Senegal	X	X					X	

Source: (O'Connor and Company undated)

Only Ghana has signed the Nagoya Protocol and has an extant ABS law. Only Benin and Senegal have laws in place for Geographical Indications.

c) Safety compliance standards

For food products exported to the EU some means of assuring safety is needed to comply with the General Food Law. One way for a producer to achieve this is to use a food safety certification system such as Hazard Analysis and Critical Control Point (HACCP) or ISO 22000, which is a food safety management standard. ISO 22000 incorporates HACCP and is becoming the food industry norm within the EC. The ISO standard requires third party inspection and is, therefore, relatively expensive.

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Much food exported from AFTER countries to the EC is not produced using a food management standard. It is not a requirement for export, but a voluntary certification system provided by a private company. In countries with a significant tourism industry (e.g. Senegal and Egypt) more and more hotels and airlines are implementing food management standards to reduce the risk of loss of reputation.

If re-engineered AFTER products are to enter mainstream markets, food management certification may be necessary because it is demanded by customers.

d) Other product specific certification - The Slow Food Movement – ‘Artisanal’ labels

New concepts to protect and promote traditional foods that are threatened by mass production methods are emerging. The Slow Food Movement is a good example. It combines a number of concepts discussed above such as environmentally friendly, fair trade and organic with the concept of local and small-scale production⁷. Members exist in Benin and Senegal. Benefits seem to be conferred by mutual promotion among Slow Food aficionados.

Numerous other food promotion groups exist in Europe and could be beneficial for AFTER products which are safe to eat but not so re-engineered that they are no longer recognisably connected with their traditional method of production.

6.5 Summary of the potential for re-engineering through certification

Table 9 below summarises the types of certificates that might be used by the products and considers whether the market either expects them for market entry or is prepared to pay a premium price if the certification is achieved.

Table 9: Assessment of certifications

Product	Type of certificate	Expected by markets	Will give premium
Kong	Safety	No	No
	Environmental		
Lanhouin	Safety	No	No
	Environmental		

Source: Authors opinion

Most certificates require initial application followed by regular inspection by a third party. A typical third party inspection costs from Euro 2-3,000. Costs can be shared among a number of establishments. Where local certification bodies exist this can save costs. Different end EU markets expect different certification bodies – so this needs to be checked before you get the certification.

⁷ See <http://www.slowfood.com>

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In summary, certification is not necessary for AFTER products, but in some cases, the market now expects it (e.g. environmental assurances for wild harvested products). The survey for Lanhouin and Kong suggests that neither the specialist food market targeted nor the diaspora market would pay a premium for certification or would require it.

7. Conclusions and recommendations

Demand for fisheries products is growing across the EC. The specialist and gourmand sub-sector is particularly strong in all the countries researched (France, UK and Portugal).

The EU diaspora market wants a good value, authentic product, but new, more quality and health conscious segment is opening up. This type of consumer may pay a premium for quality and presentation.

Presentation of an improved Lanhouin product to the specialist gourmand market looks very promising.

The market for improved Kong is currently unsupplied, but a premium for the new Kong product vs the traditional one is uncertain.

SWOT analysis shows that certification of origin and branding will be important for both re-engineered Lanhouin and Kong products. Certification for other factors such as 'fair trade' is probably not worthwhile for Kong and Lanhouin at this time.

Results of marketing questions for Kitoza applied in Portugal to consumer acceptance testing shows a strongly positive price relationship between the product and its African origin. This has important implications for product promotion.

For both Lanhouin and Kong the market space is not particularly crowded, though in the non-diaspora sector Kong has competing products that are easier to eat (e.g. tilapia and pangasius).

Both Lanhouin and Kong in their proposed re-engineered form comply with the EU framework as long as they are produced and exported from EU certified premises.

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Annex 1: Survey questionnaire and instruction manual



AFTER WP5

EU Market Survey Manual

About this guide

We are trying to get a general impression of the likely market entry points for our re-engineered AFTER products in France, the UK and Portugal. We will do this by using a qualitative survey instrument (i.e., guide questions which will start a conversation that is recorded as a case study).

The purpose of this guide is to help you conduct the interviews and prepare the case studies in a way that allows us to compile them into a report which can be useful for the future launch of re-engineered products.

The guide explains the sampling protocol, the ethical form and the reason for the different questions. We have tested these questions in Paris between 11-13 February 2014 and in the UK from 18-21 February 2014, and found that, if applied correctly, these give some really useful pointers about the future markets for AFTER.

Sampling

The desk market research and impressions from AFTER collaborators have indicated two key general market segments for the ‘improved’ AFTER products. These segments are the:

- EU African diaspora market; and,
- Exotic/health/epicure market.

We define these segments as follows:

Diaspora

First or second generation African residents in the EU, mainly living in cities and buying food from ‘home’ regularly. This market also includes ‘urban experimenters’; people who have visited African and who want to follow up with the interesting foods that they found there, as well as ‘epicures’; those who experiment with ‘exotic’ foods as a hobby.

Exotic/health/epicure

This group, which slightly overlaps with the group above, includes people buying healthy and exotic foods for the experience and for the benefits that the food confers. So, for example, this can be people with no interest in the ‘African’ origin or the story behind our products necessarily, but who want the product for its inherent qualities (e.g., natural, healthy, with fibre, without gluten). This group is much larger than the diaspora group and is rather fragmented. It ranges from specialist health food stores and chains, specialist food section of larger food stores and delicatessen stores. There may be many others categories in the three countries that we have not yet identified – so please suggest.

The sample consists of 8 products, 3 countries and 2 market segments. We suggest that this is broken down as follows, but we are conscious that you might find somebody very interested in a

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product in your country that we have not included in the list below. In the UK test, for example, we found people very interested in selling Lanhouin when we did not expect it, so we did follow-up questions on this.

The sample framework looks like this – but, as explained above, it is flexible (table 1).

Table 1: Products, forms and locations

Product	Re-engineered form	Testing Country			Total of each product tested
		UK	France	Portugal	
Bissap	Concentrate	☐	☐		2
Baobab	Powder			☐	1
Jaabi		-----No-----			0
Lanhouin	Condiment		☐		1
Kitoza		-----No-----			0
Kong	Improved smoked		☐		1
Akpan	Bottled beverage		☐		1
Gowe	Flour			☐	1
Kenkey	Improved traditional	☐			1
KS	To be agreed	☐	☐	☐	3
Total for each country		3	5	3	

We have three product groups (fermented products, functional foods, fish and meat), so we need to have coverage of as many as possible in each country (at least one from each group). We suggest the products above, but you might want to change this or do more depending on the response from the interviewees.

In the survey test we found that it takes about one hour for each product. In some cases, people were kind enough to allow us to do two products in one store.

For the purposes of triangulation (i.e., checking what you found from one respondent with another to see if it is consistent) we recommend at least two interviews for each product per segment. It would be preferable to have more if this is possible.

Locating people to interview

We would recommend a team of two with one taking notes and one asking questions.

You need to make an appointment with the shop owner or buyer of produce.

Ask what the quietest time of day is.

Be prepared to do the interview standing up while a shop owner keeps breaking off to deal with customers. However it is best to find a quiet area to sit down with the interviewee if you can.

We have prepared a general interview background to help you get interviews and to explain why we are doing this work. We suggest that you adapt this format to meet your local conditions (change the logos and signatory for example).

If you do not email this ahead, then you should present it to the interviewee at the start of the interview.

Ethical form

It is important that we get prior informed consent to use the information that we gather. The form looks difficult, but we found in testing that people were quite happy to sign it. Please get one form signed for each interview and send them to us for retention. Some people may need some time to understand the form and its purpose.

At Annex 1 and 2 you will find:

An example of a letter of introduction

An example of the consent form

The interview process

Ask background questions (section 1)

We suggest you start with the easy background questions which are general to all the products. This also gets the interviewee responding.

Present Product Profiles for respondent to read

You should present the Product Profile for the product you are focussing on to the interviewee and let them have time to read it and ask questions. Record any interesting questions and discussion.

Ask the questions

Ask respondent each question and get views against all products for that question/ or alternatively ask respondent each question for one product and then go through the questionnaire again with another product.

The questionnaire

The questionnaire is based around the 4 P's concept (Product; Place; Price; Promotion).

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General advice

Some questions are optional – you have to use your ‘good sense’.

It might be a good idea to number the questions because it makes it easier to write down the answers related to the question’s number.

Sometimes the order of the questions can be changed depending on how the conversation flows.

Follow up questions are very important, particularly if someone offers some new information of relevance.

List of questions

The table below explains each question in detail.

Question	Discussion
<u>General information</u>	
1 Name	We will not use this name in the report but we need to be able to contact the respondent if necessary
2 Location of store	Area (the store might be located in a different place to the contact)
3 Contact details	Address and phone number
4 Type of business	Describe what the respondents classify themselves as – e.g. family store, chain store, company, supermarket etc.
6 Size of business	Small, medium, large
7 Type of customer using this outlet/store	For example from Africa (countries), European, young, old, mainly women, from what economic groups. Please indicate the country of origin of customers if possible.
<u>PRODUCT: Questions about the product(s)</u>	
8 What kind of consumer might buy the product?	How does the respondent describe the type of person that might buy the product you have described? The language used is important so record anything useful e.g., people who have been on holiday to Africa, experimenters, health nuts etc. (this question is specific to the product presented to the respondent).

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9	What reasons might they have to purchase (or not purchase)?	What aspects of the product do they think might be attractive to their customers (or unattractive)?
10	What problems do you envisage persuading customers to try this new product and how would you overcome them?	This question is to establish how vendors persuade customers to try something new. For example, giving samples, explaining the product, comparing the product to another similar. Sometimes there will be no problems.
11	Do customers consider the African origin of this product an advantage or a disadvantage?	Different markets can either gain a positive from the African origin or a neutral/negative response. We need to know which market responds to what stimulus.
12	What products might compete with this one?	It really helps to know the competing products so that can set the format, size, price etc. The price of competing products is very interesting to us.
13	What size and format would work best for this product?	This refers to the format of the product that the consumer takes away (e.g. the bottle, bag etc.). The colour, feel, quality, weight, size, transparency etc., of the packaging may be important to different customers.
14	What sort of volume of this type of product might be sold a month (range of units)? (sales volume)	How many carton/boxes/units of what size would they buy wholesale per month? This gives us an idea of the scale of this market opportunity if multiplied by the number of outlets.
15	What is the minimum/typical size of wholesale packaging for this type of product e.g. no. of units in a box, minimum order? (wholesaler volume received)	Retailers have strong views about the type of bulk packaging and the level of stocks that they hold (many have no space for example). Sometimes they do not want too few units, so we need to know what is the smallest/typical number of units that would be convenient for them.

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16	What shelf-life would you expect on this type of product?	How long can they keep it before it is spoiled (the date that the product has to be used by)? You might find that some stores have limited refrigeration storage and don't like to keep too much chilled or frozen product.
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PLACE: Questions about the location of sale

17	Where (what type of outlet) would you expect this product to sell best – e.g. specialist store, supermarket, on-line outlet, open market, door-to-door, peer-to-peer etc.?	It is interesting to know from retailers what their perception of the 'best' place for the sale of the product would be (if it is not their own shop). This can guide us to new market opportunities.
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PRICE: Questions about price

18	What price would consumers be willing to pay for this type of product (range – from x to y)?	Sometimes you have to ask in respect to competing products to get an idea. It is important to be clear on the packaging and size of product that the price is referred to.
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19	What margin would you expect between the wholesale price and the retail price (%)?	This is the difference between the shop buying price (wholesale) and the consumer buying price (retail). It is best to ask for a percentage.
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20	What are the typical payment terms you use (timeframe between reception of the product and payment to the wholesaler)?	Normally the shop keeper will get on credit and pay the wholesaler after some time. It is useful to know how this works for planning cash flow.
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PROMOTION: Questions about promotion and presentation

21	What makes this type of product sell well e.g., advertising, chef recommendations, recipes, customer holiday experience, etc.?	Please give details on how best the product should be promoted to best attract the consumer
22	What kind of information would you need on the product or associated with the product?	Please give details on which information should be on the packaging to best attract the consumer
23	What point of sale advertising is needed?	This refers to the way the product is promoted on the shelf of the shop and located in the store. Please give details on where the product should be presented to best attract the consumer
24	What kind of branding (if any) works well for this type of product?	Do they expect this product to have a clear brand name or would it be sold without a name? What brand works well for this market/outlet? Is an African brand name attractive?

Writing up the case study

We have attached some examples of case studies prepared in Paris during the test. The narrative does not have to follow the format of the interview exactly. All information, including your impressions, is potentially useful.

The case studies do not need to be very long.

It would be good to have some key findings highlighted at the end. What were the important points that came out of this interview?

We will gather these case studies and cluster the key findings to draw some general conclusions about our research questions.

Example of a letter of introduction



Dear Sir/Madam

Request for an interview

The Natural Resources Institute (NRI) of the University of Greenwich is a world-renowned centre for research into poverty reduction in developing countries (www.nri.org). Along with partners in France, Portugal, Italy, Ghana, Nigeria, Senegal, Benin, Cameroon, Madagascar, Egypt and South Africa, NRI is implementing a European Union funded research project to ‘re-engineer’ traditional selected African foods for international markets. This project is called the African Food Tradition Revisited by Research (AFTER) – see <http://www.after-fp7.eu/en/>.

As part of this research we are visiting a limited number of targeted food retailers in France, Portugal and the UK to find out how retailers and consumers might respond to the re-engineered African food products. We will introduce some of the products and discuss with you what you feel about them. The interview should take around one hour.

The results of this study will allow a better assessment of the likely market with respect to these products and will greatly increase the chances of their successful European launch. In the longer term, demand for novel African foods may create much-needed jobs and livelihood opportunities.

The information you provide will be used only for scientific purposes and will be treated as strictly confidential. We guarantee anonymity.

Yours faithfully

Ben Bennett

Professor, International Trade and Marketing Economics

Head, Food and Markets Department

Natural Resources Institute University of Greenwich

Medway Campus, Central Avenue, Chatham Maritime, Kent, ME4 4TB, UK

Tel: +44 (0) 1634 883449 | Fax: +44 (0) 1634 883706 | Skype ben.bennett123 |

E-mail: ben.bennett@gre.ac.uk

This project has received funding from the European Union’s Seventh Framework Programme for research; technological development and demonstration under grant agreement no 245025

Example of the ethical form

Participant consent form

Title of Research: Market study on potential African products for the UK/EU market	
Investigator's name:	
To be completed by the participant	
1. Have you read the information sheet about this study?	YES / NO
2. If you asked questions did you receive satisfactory answers?	YES / NO / Not applicable
3. Do you understand that you are free to withdraw from this study at any time and without the need to give a reason?	YES / NO
4. Do you agree to take part in this study?	YES / NO
Signed	Date
Participant name in block letters	
Signature of investigator	Date

<p>This Project is Supervised by: Dr Dominique Pallet</p> <p>UMR QualiSud Cirad Département PERSYST Montpellier, France</p>
<p>Contact Details (including telephone number):</p> <p>Professor Ben Bennett</p> <p>Natural Resources Institute University of Greenwich Medway Campus, Central Avenue, Chatham Maritime, Kent, ME4 4TB, UK Tel: +44 (0) 1634 883449 E-mail: ben.bennett@gre.ac.uk Web: www.nri.org</p>

Annex 2: Product case studies

Case Study 1

Date:	13/2/14
Name of outlet:	Izrael shop – Marais Mr & Mrs Sozolski 30 rue Francois Miron 4eme Tel: +33 698460606; 142726623
Name of interviewee:	Mrs Sozolski (owner)
Location:	Paris
Type of store:	Medium, Exotic foods outlet, family owned. Historic shop (existing for 70 years)
Product:	Kiskh Sa’eedi, Kong

Aya presented Kisk Sa’eedi (KS) to Mrs Solozski. She indicated that this type of product was not of interest for the shop therefore we moved on to another product, bissap concentrate. Mrs Solozski has bissap calices in her shop. She said that she thinks that customers would better like calices rather than bissap powder. Customers who buy hibiscus products are either French people (e.g. people who have travelled to countries where bissap is consumed), people from French Caribbean island (e.g. Martinique). Very few Africans because the products would be too expensive for them. Racine is one of their suppliers. In order to attract the customer a nice picture of the product might be useful and also a free sample for the consumer to try.

Currently no concentrates are sold in the shop. A 25cl bottle in glass (glass is important because it makes look like the product is high quality – no plastic). What attracts the consumer? Mrs Solozski answered “my charm” – her personality – customers don’t feel the same as in the supermarket because the shop is personalised. The shop has been known for a long time and the owners as well.

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Case Study 2

Date: 13/2/14
Name of outlet: Horizon Uni Address: 25 rue Poulet 75018 Paris
Name of interviewee: Mrs Chang (owner)
Location: Paris
Type of store: Small, African foods outlet, family owned.
Product: Akpan, Kong

Akpan is well known to Mrs Chang. She was aware that it comes from Benin and says that she get asked for it by people from Benin and neighbouring countries. She sells a similar product from Togo called **Aklui** in a granulated form. She thinks that the market for this product is mainly among the expatriate Togolese community, but admits that she is struggling to tell the difference between customers of these two nationalities.

For her this competes with Aklui and Gari or Tapioca flour. She sells Aklui granules for €3.90 for 500g.

She really likes the packaging shown in the photographs (white bag/pot and yellow label). She says that people from Benin and Togo are very trusting and so are not worried that they cannot see the product through the packaging. Buyers from Senegal, however, will always want to be able to see the product through the packaging.

She thinks that Akpan presented in this way would not need any promotion or advertising, but that that free samples would be important.

The shop could sell 5-10 boxes of 24 bottles in a month. She wonders if the bag in the picture is a liquid or a flour (we could not answer). She prefers the liquid.

The space that the product takes on her shelves is very important, as her shop is small. She says that sachets tend to break and so she does not like them.

For those not familiar with Akpan she thinks it would be very difficult to persuade them to make a first purchase but would try if free samples were available.

She would want the maximum possible shelf-life and some product move very slowly in her shop and she has very limited chiller space which is already full.

The Price she would expect this to sell for in her shop is €1.90 for the bottle and about the same for the sachet. A flour would keep longer so she thinks this would be cheaper – say €1.20 to 1.30 per unit.

She normally puts a 30-40% mark-up on the wholesale buying price. She would expect to pay the supplier after 30 days.

She would expect the packaging to show the origin and the instruction for producing the final drink and would like the label to be in both English and French because she has many Ghanaian customers.

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Case Study 3

Date: 11/08/14
Location: 36 Rue Poulet 75018 Paris
Type: Medium, African food outlet
Product: Akpan, Lanhouin
Contact:

This is a medium-sized store offering mainly products intended for African consumers. The customers are African from all nationalities, but in general, Cameroonian, Malian and Senegalese, etc. The average customer age is above 20, with both men and women (to a slightly greater extent), from the medium-level economic group.

The products presented were Akpan and Lanhouin.

In the store, the product names were not known. In their description, they compared Lanhouin to Guedjj, or dried and salted fish. It was the first time they discovered Akpan as a beverage; other products such as fermented maize are sold and consumed in other ways.

The product origin is important for customers, and an African name will be more attractive.

According to the seller, customers for these products will be African. These products can be sold throughout the year but possibly peak sales for Akpan are on Ramadan, and for Lanhouin on Ramadan and the holiday period. The reason why consumers tend to buy Akpan is that they know the product and it comes from its traditional source. The seller says that she can't persuade consumers to buy these products because in general, African consumers have some misgivings about novelties; they have their habits, and if they don't know products they don't buy them.

For Lanhouin, a competing product could be existing dried and salted fish, maybe Kong; and for Akpan, the store doesn't sell any similar products or potential competing products.

The seller can use ads and promotions for her marketing. She gave no answer about location, price range, her margin and typical payment method, expected sales, expected coming volume and shelf life, because either these were confidential or she can't answer because she doesn't know the product.

The packaging should indicate the DLC and origin for both products, and also the ingredients for Akpan.

About the packaging of Akpan, initially, a small volume should be better for tasting and the range of prices would be as cheap as possible. For Lanhouin, a small format is better and the price should be around 2 euros.

According to the seller, these types of products would sell in ethnic stores, plus free sales for Lanhouin.

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Case Study 4

Date: 11/08/14
Location: 25 Rue Poulet 75018 Paris
Type: SARL, Medium (under 10 employees), African food outlet
Product: Akpan, Lanhouin
Contact:

Horizon UNI is a medium-sized store offering mainly products intended for African consumers. Its customers are African, from West and Central Africa (Malian, Senegalese, Cameroonian, Beninese, Ghanaian, Ivorian and Congolese). The average customer age is above 20, with both men and women (to a slightly greater extent) from a medium-level economic group.

The products presented were Akpan and Lanhouin.

In the store, the product names were not known. In their description, they compared Lanhouin to Guedjj, or dried and salted fish.

The product origin is important for customers, and an African brand name will be more attractive for Lanhouin; but for Akpan, the origin is not important.

According to the manager, customers for these products will generally be West Africans. These products can be sold throughout the year because they can be used any day, but possibly peak sales for Akpan are on Ramadan. The reason why consumers tend to buy Akpan is that they know the product, the taste; or if they want to discover it, during the holiday period and Ramadan. For Lanhouin, the taste, natural and organic labelling is attractive; but if it smells bad and is not well presented, it can be very unattractive.

The manager says that he can't persuade consumers to buy Lanhouin if it is poorly packaged, or Akpan if it has a bad taste.

For Lanhouin, a competing product could be the Yet; and for Akpan, yogurt, but the store doesn't sell a similar product to Akpan or potential competing products.

He will use ads for Akpan, and cooking recommendations. He didn't give an answer on the price range, his margin and typical payment method, expected sales, expected incoming volumes and shelf life, because either these were confidential or he can't answer because he doesn't know the product.

The packaging should indicate the DLC, the weight and ingredients for Lanhouin, and also virtues for Akpan.

Regarding the volume range of Lanhouin, it should be 30-80 g. For Akpan, the best location is in the smooth product section.

According to the seller, these types of products would sell in ethnic stores and specialized markets for Lanhouin; and specialized markets and supermarkets for Akpan.

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Case Study 5

Date: 12/08/14
Location: 56 Rue Championnet 75018 Paris
Type: Medium, African food outlet, Togolese food in particular
Product: Akpan, Lanhouin
Contact:

Tropikaf Ahouenou is a medium-sized store offering mainly products intended for Togolese consumers. Customers are African in general, but mainly from Togo. The average customer age above 30, with both men and women. Togolese consumers are from a medium and high economic group, or slightly lower for other Africans.

The products presented were Akpan and Lanhouin.

The product names were known in the store because the manager is Togolese. She was surprised to see how Akpan is presented because she knows it as fermented maize paste. In this store, Lanhouin and Akpan paste have been sold.

The product origin is not important, because for her customers anything from Africa is unattractive.

According to the manager, customers for these products will be Africans in general for Lanhouin; and Togolese, Beninese and Ivorian for Akpan.

These products can be sold throughout the year. The reason why consumers tend to buy Akpan is that they know the product; or if they want to discover it, if they intend to travel and for parties. Novelty, ecological, natural and organic labelling would be attractive; the African origin can be very unattractive because consumers prefer Asian and European origin; they are suspicious of soft properties.

The manager says she can persuade consumers to buy Lanhouin and Akpan, depending on how she talks about them.

Nevertheless, she thinks that Lanhouin will sell better than Akpan, because the latter isn't well known. She advises that after works on Wanga (cheese) and ablo (maize or rice); these are Togolese products which are very popular among many Africans and Europeans.

The manager uses the internet, word of mouth, ads on Togolese websites and brochures for her marketing. She doesn't answer about the price range, her margin, expected sales, the expected incoming volumes and expected location, because either these were confidential or she can't predict sales. Most perishable products are frozen, even Lanhouin. The typical payment method is cash. She orders most of her products directly from Togo.

The price range is around 2.5 euros for Lanhouin, and 2-2.5 for Akpan.

The shelf lives should be over 2 months for Lanhouin, and 3 weeks for Akpan.

She likes vacuum packaging for Lanhouin, because it traps the odour, and prefers a clear bottle for Akpan; customers like to see the appearance of the product through the packaging.

Regarding the volume range of Lanhouin, it should be 100 g; and 300 ml for Akpan.

According to the manager, these types of products would sell in ethnic stores and also in supermarkets such as Carrefour for Akpan, because in Paris Africans quite often frequent these stores.

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Case Study 6

Date: 12/08/14
Location: 28 Rue Poulet 75018 Paris
Type: Medium, African food outlet
Product: Lanhouin, Akpan

El mundo is a medium-sized store mainly offering products intended for African consumers, representing 99% of customers according to the Manager.

The products presented were Akpan and Lanhouin.

The product names were not known in this store. After description, they compared Lanhouin to Guedjj, or dried and salted fish; but Akpan is a novelty for the manager.

Customers of this product are African in general, mainly Senegalese, Malian and Ivorian.

Regarding the volume range of Lanhouin, it should be 150-200 g; and for Akpan, 300 ml.

She likes vacuum packaging for Lanhouin. The brand is not very important, but it would be good to have it. The most important thing is product quality.

Regarding Akpan packaging, a clear/transparent bottle would be better. The price must be less than 1.5 euros.

At first, for her marketing she can make demonstrations like in a supermarket, or like Racines did.

She can persuade consumers to buy these products by how she talks about it, especially if it's a smooth and mild product.

Expected sales per month are initially: 1 box containing 24 bottles.

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Case Study 7

Date: 12/08/14
Location: 5 Rue Panama 75018 Paris
Type: Medium, African food outlet
Product: Lanhouin, Akpan

Exo Afrique is a medium-sized store offering mainly products intended for African consumers (from Central Africa, Cameroon, Congo Brazzaville and Kinshasa, plus a few Senegalese and Malians).

The products presented were Akpan and Lanhouin.

The product names were not known in the store. After description, they compared Lanhouin to Guedjj, or dried and salted fish, but Akpan is a novelty for the manager.

He said he can assess products without tasting. But its saleability can be better if it has a good presentation.

He didn't give an answer about the price range (depending on cost price), the margin, expected sales (depending on customers), the expected incoming volumes and expected location, because either these were confidential or he can't predict sales.

The manager likes vacuum packaging for Lanhouin. The brand mark is important, but it can either be an African name or not.

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Case Study 8

Date: 08/14
Location: Château Rouge 75018 Paris, Venissieux
Type: Medium, African food outlets
Product: Akpan, Lanhouin

BEAUTE TROPIC, Wingtekhong, Number one and Exotic Rdc bio are medium-sized stores offering mainly products intended for African consumers. They sell Guedjj and other dried and salted fish. The store in Venissieux is a big store selling products intended for Asian and a few African customers.

The products presented were Akpan and Lanhouin.

The product names were not known in the stores. After description, they compared Lanhouin to Guedjj, or dried and salted fish; but Akpan is a novelty for the sellers. Most of them didn't answer our questions, but the price of dried and salted price varies between the stores.

In **Wingtekhong**, one kilo of Guedjj-beur cost 82.90 euros.

He said he can appraise products without tasting them. But it can be saleable if it has a good presentation. In Number one store, there are more than 100 kg of salted fish, and 100 g costs 2.10 euros. In Exotic Rdc bio, the manager said that they sell more than 500 kg of dried fish per month.

They didn't give an answer about the price range, margin, expected sales, the expected incoming volume and expected location, because these were confidential.

BEAUTE TROPIC's seller said that she likes the packaging of Akpan and Lanhouin (presented in the picture); and for Lanhouin she can sell 100 kg per month, with 100 g selling at between 3 and 5 euros.

In Parisian stores African products work well, and customers have a good buying power.

Most of them find that a brand mark is important for these products.

Case Study 9

Date: 17/04/14
Location: Chateau Rouge, Paris
Type: African foods outlet
Product: Kong

Togo EXOTIC is a small shop barely leaving a customer space to walk around, but this did not impede the footfall we noticed. This point showed us that the customer is not primarily interested in the type of store, but rather in product availability. The products are characteristic of the old ways are displayed both inside the store and also on stalls outside.

The manager tells us that the main clientele here is of African origin, who purchase kong smoked in order to conserve their food culture. In this store the kong was displayed without bulk packaging.

According to Katia ROBERT, the Customer Manager, customers have more confidence in this kind of product on open-air display, leaving a possibility of negotiation. This product is sold mostly in pieces by the trader, for a sale price ranging from €3 to €5.

Case Study 10

Date: 17/04/14
Location: Chateau Rouge, Paris
Type: African foods outlet
Product: Kong

El Mundo is a medium-sized store containing mainly products intended for African consumers, who represent 99% of customers according to the Manager.

Smoked kong is a product that sells well in general, and so has a weekly supply. For the merchant, a medium size would be more suited to customers, who also prefer the packaging is transparent, so as to see the product before purchasing, to make sure of the quality. The brand and the provenance of the product have no real importance, unlike the smoking method; in the knowledge that kong is considered good quality when it is dry. The store receives frozen smoked cat fish in bulk in boxes with plastic cases.

They sell it in bulk frozen at -18°C for €15/kg in single plastic bags. The box and bags are unmarked. They sell an average of 100 kg per week, with at least €10 per customer sale. According to Leila Moulouk, the most suitable outlet will remain exotic groceries.

Case Study 11

Date: 04/14
Location: Chateau Rouge, Paris
Type: African foods outlet
Product: Kong

At **BEN DIFF** we found a store that seemed really better arranged, with shelves more clearly presenting the products.

The smoked kong is presented in a transparent package containing one piece. But this seller tells us that the practice is to open up the product and sell it in pieces, since the majority of customers still want to negotiate the lowest price. The minimum purchase per customer here is €5. For this merchant, a medium size for this product would be preferable to customers.

The fish comes either from Indonesia or Holland. They also have Belgian providers: "Domshi International". According to them, the origin is important for the customer, and promoting the African origin of our products may encourage customer purchases. However, the customer doesn't pay attention to the brand.

Case Study 12

Date: 17/04/14
Location: Chateau Rouge, Paris
Type: African foods outlet
Product: Kong

Paravic is a fairly large store specializing in fish, essentially comprising several large freezers. We found it contained Kong, mainly frozen from Indonesia. According to the Manager, their trade is mainly wholesale, and their main supplier is Prodimar SA (Marseille, France). The frozen smoked kong is received in boxes with plastic film containers; it is prepared in bulk and is also sold in bulk in frozen at -18°C. It is sold by the kg (€12.90/kg), with the possibility of cutting the fish if the consumer wants less. According to them, the consumer gives little importance to the brand. Africans are the main clientele and the Senegalese in particular. They are mainly restaurant owners and people wanting to keep this product for personal consumption.

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Date: 12/2/14

Name of outlet: Ben Dhif Sahbi Alimentation Generale 33 Bis rue des poissoniers 75018
Paris Tel: +3342641964

Name of interviewee: Ben Dhif Sahbi (owner' son)

Location: Paris

Type of store: Small, African foods outlet, family owned.

Product: Kong

This store sells mainly to Francophone Africans but also has a number of Ghanaian and Nigerian clients. Customers tend to buy small amounts of food at a time (one meal) and are constrained by how much they can carry in plastic bags.

Already sells UK made frozen Kong but this product is not really popular. He thinks that is it not smoked in the way that his customers like (e.g., it is not dark enough). He sells frozen Kong for €19.90/kg, but the price has now dropped to €14.90 because the EU made Kong is not selling. Many shops sell Senegalese Kong which is much darker and he cannot compete with this.

The product is presented in a clear vacuum pack. The customers of Kong like to see what they are buying. He thinks that the majority of customers who are familiar with Kong are indifferent to any toxicity or health issues. He says that they are non-quality conscious but want something that looks 'familiar' i.e., black.

Medium size Kong is preferred (not too large).

He thinks that there is a niche for 'safe' Kong for higher income groups who are becoming health aware. This product could sell for a premium of 20-30% over the traditional product.

He sells about 15kg of Kong a month (about 30 pieces of 400-500g).

With an improved quality product advertising would be important to explain the benefits. The best way to promote the new product would be to get existing Kong consumers to 'upgrade'. The health benefits would have to be displayed clearly on the new product.

They would only want small quantities to start with – about 5kg.

If the product is frozen the shelf life is not of concern to them. If refrigerated then a three week shelf life is fine.

AFTER (G.A n°245025) – Deliverable 5.1.1.2
Report on marketing and regulatory opportunities for EU for group2

Case Study 13

Date: 13/2/14

Name of outlet: Izrael shop – Marais Mr & Mrs Sozolski 30 rue Francois Miron 4eme Tel: +33 698460606; 142726623

Name of interviewee: Mrs Sozolski (owner)

Location: Paris

Type of store: Medium, Exotic foods outlet, family owned. Historic shop (existing for 70 years)

Product: Kiskh Sa’eedi, Kong

Aya presented Kisk Sa’eedi (KS) to Mrs Solozski. She indicated that this type of product was not of interest for the shop therefore we moved on to another product, bissap concentrate. Mrs Solozski has bissap calices in her shop. She said that she thinks that customers would better like calices rather than bissap powder. Customers who buy hibiscus products are either French people (e.g. people who have travelled to countries where bissap is consumed), people from French Caribbean island (e.g. Martinique). Very few Africans because the products would be too expensive for them. Racine is one of their suppliers. In order to attract the customer a nice picture of the product might be useful and also a free sample for the consumer to try.

Currently no concentrates are sold in the shop. A 25cl bottle in glass (glass is important because it makes look like the product is high quality – no plastic). What attracts the consumer? Mrs Solozski answered “my charm” – her personality – customers don’t feel the same as in the supermarket because the shop is personalised. The shop has been known for a long time and the owners as well.

Report on marketing and regulatory opportunities for EU for group 2

Case Study 14

Date: 13/2/14
Name of outlet: Horizon Uni Address: 25 rue Poulet 75018 Paris
Name of interviewee: Mrs Chang (owner)
Location: Paris
Type of store: Small, African foods outlet, family owned.
Product: Akpan, Kong

Akpan is well known to Mrs Chang. She was aware that it comes from Benin and says that she get asked for it by people from Benin and neighbouring countries. She sells a similar product from Togo called **Aklui** in a granulated form. She thinks that the market for this product is mainly among the expatriate Togolese community, but admits that she is struggling to tell the difference between customers of these two nationalities.

For her this competes with Aklui and Gari or Tapioca flour. She sells Aklui granules for €3.90 for 500g.

She really likes the packaging shown in the photographs (white bag/pot and yellow label). She says that people from Benin and Togo are very trusting and so are not worried that they cannot see the product through the packaging. Buyers from Senegal, however, will always want to be able to see the product through the packaging.

She thinks that Akpan presented in this way would not need any promotion or advertising, but that that free samples would be important.

The shop could sell 5-10 boxes of 24 bottles in a month. She wonders if the bag in the picture is a liquid or a flour (we could not answer). She prefers the liquid.

The space that the product takes on her shelves is very important, as her shop is small. She says that sachets tend to break and so she does not like them.

For those not familiar with Akpan she thinks it would be very difficult to persuade them to make a first purchase but would try if free samples were available.

She would want the maximum possible shelf-life and some product move very slowly in her shop and she has very limited chiller space which is already full.

The Price she would expect this to sell for in her shop is €1.90 for the bottle and about the same for the sachet. A flour would keep longer so she thinks this would be cheaper – say €1.20 to 1.30 per unit.

She normally puts a 30-40% mark-up on the wholesale buying price. She would expect to pay the supplier after 30 days.

She would expect the packaging to show the origin and the instruction for producing the final drink and would like the label to be in both English and French because she has many Ghanaian customers.

Annex3: Product Marketing Fiche

Kitoza: let's share a Malagasy meat specialty!

- An original way to consume fine and tasty meat from pork or beef
- Ready-to-eat high protein food
- A typical recipe of salted and dried meat with a unique flavor

> Kitoza is a traditional dish of the Tops-trays of Madagascar, formerly intended for kings and noble persons. It is made from beef or pork meat, which is salted and dried. The preparation of this specialty has been improved, developed according to a process which preserves all the authenticity of the product. With good sanitary, nutritional and organoleptic qualities, Kitoza is now available for African and European consumers.



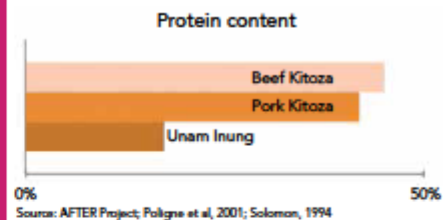
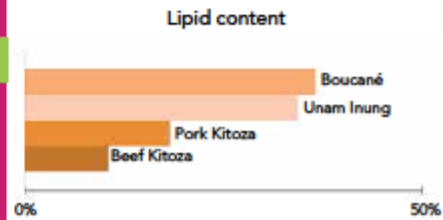
© AFTER Project

What are the key properties of Kitoza?

Kitoza is obtained from noble pieces of meat, which are sliced before being seasoned and dried. The process guarantees a better conservation and a unique flavour. Traditionally, Kitoza is recommended to nursing mothers or people in convalescence because of its high protein and micronutrients content.

Kitoza still has a place of choice in the menu of the Malagasy households today, thanks to its high nutritional value and its relative ease of preparation.

It contains only natural ingredients of which the beef or porc meat, salt, garlic, ginger, and some oil.



Source: AFTER Project; Poligne et al, 2001; Solomon, 1994

AFTER "new products"

Building on traditional processes, the research conducted for the European Union funded project African Food Tradition rEvisited by Research (AFTER) led to the preparation of new products. Produced in accordance with good manufacturing practices, they offer:

- > Optimised microbiological and nutritional qualities, thanks to a perfect command of transformation processes;
- > Adapted form and packaging for the different markets (African and European ones);
- > A longer shelf-life for a better storage and a simplified transport.



© D. Luvaino-CIRAD



Kong: a traditional smoked fish revisited

A smoked fish with original and varied flavours

A food with remarkable nutritional properties

A food with potential for many different recipes



Traditional smoked Kong ©AFTER project

> Kong is handcrafted from “catfish” (*Arius spp*), a species common along the West African coast. The traditional product, or “smoked Kong” in Senegal, is used as a protein source providing a delicious “smoked” taste and smell in a half dozen different traditional Senegalese dishes.

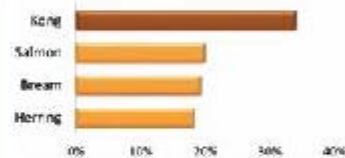
What are the reported key properties of Kong?

With low lipid and high protein content, Kong is a fish with an excellent nutritional profile. Notably, it has more protein and less lipids than salmon or herring.

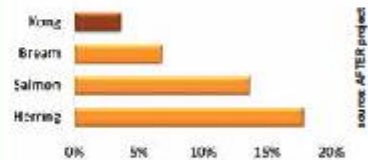
The improved AFTER smoked Kong process is a healthy food with preserved nutritional qualities. A new processing step of soaking in salt, ginger or garlic gives a pleasant flavour to the fish and optimizes its organoleptic qualities.

Better control of the smoking step yields a high quality smoked fish within the current EU regulation (EU) No. 835/2011 regarding contents of Polycyclic Aromatic Hydrocarbons (PAHs). Improved processing and packaging allows better product handling and inclusion in a cold chain.

Proteins



Fat



source: AFTER project

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AFTER African Food Tradition Revisited by Research

Lanhouin, a 100% natural condiment

An original condiment to flavor your dish

A natural product, rich in protein

An African delicacy for you to (re) discover

> A condiment and a flavour, Lanhouin is traditionally made in southwestern Benin from salted fish, fermented and dried. This product is mainly used for its organoleptic characteristics that give traditional cooked dishes a delicious fishy flavour.

This product is familiar to consumers as "Lanhouin" in Benin, "Momone" in Ghana, "Adjuevan" in Ivory Coast and "Guedj" in Senegal and Gambia. Ingredients : Various pelagic fish including Sea Bass (*Pseudotolithus* sp) and Frigate Tuna (*Scomberomorus tritor*), salt (NaCl), lemon, garlic.

What is Lanhouin reported key properties?

Rich in protein and 100% natural, Lanhouin will bring a unique, powerful fish flavour to your dish. It is like a special, fish flavour 'cube'. Lanhouin is higher in protein than many competing products.

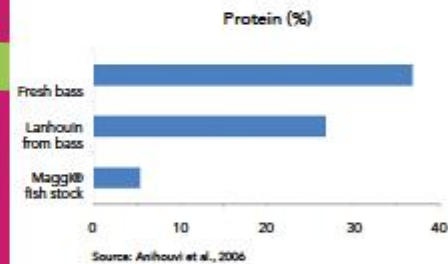
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Fresh fish used for Lanhouin © AFTER Project



Filet of Lanhouin before being dried © AFTER Project



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