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Table of Contents

Summary	3
1. Introduction.....	4
1.1 Report layout and scope.....	4
1.2 Methodology	4
2. Product Description	5
3. Possible market segments for re-engineered products	6
3.1 Diaspora market segment	7
3.2 Non-diaspora market segment.....	7
3.3 Marketing Mix	8
3.4 SWOT	9
4. Market opportunities in target EU countries	10
4.1 Akpan.....	10
4.2 Gowe.....	12
4.3 Kenkey	13
4.4 Kiskh Sa’eedi	15
5. Market entry requirements	17
5.1 The regulatory landscape	17
5.2 EU market rules	17
5.2.1 <i>Public standards and the EU</i>	18
5.2.2 <i>Private standards</i>	23
5.3 Summary of the regulatory challenges.....	24
5.4 The possibilities for compliance based re-engineering	24
5.4.1 <i>Areas of certification</i>	24
5.5 Summary of the potential for re-engineering through certification	27
6. Conclusions and recommendations	28
Annex 1: Survey questionnaire and instruction manual.....	29
Annex 2: Product case studies	39
Annex3: Product Marketing Fiche	65
Annex 4: Result of consumer focus group taste test of Kiskh Sa’eedi recipes.....	69
References.....	72

Summary

This report summarises research into the marketing and regulatory Opportunities and including value chains of a group of four grain-based traditional African foods, Akpan, Gowé, Kenkey and Kiskh Sa'eedi. 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 four products considered here are:

- Akpan, a yoghurt-like preparation from the Republic of Benin made from fermented maize;
- Gowé, a sweet paste, also from the Republic of Benin, made of malted (or non-malted) sorghum or maize flour and consumed as a beverage;
- Kenkey, a stiff dough, from Ghana, made from fermented, de-hulled, maize meal and consumed as a stiff porridge or a beverage.
- Kiskh Sa'eedi, a fermented snack and beverage from Egypt made from milk and wheat and consumed as a snack or beverage.

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 the re-engineered African foods in the EU.

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 main findings can be summarized as follows:

Akpan and Gowe. For the diaspora market a re-engineered yoghurt type drink is popular, but the market size is relatively small. The general market opportunity for these products is as a niche health food drink sold in specialist health food stores.

Kiskh Sa'eedi. There is a small, specialist, diaspora market for Egyptian food. Much more interesting is the potential to piggy-back the exciting trend for Maghrebian and Mediterranean cuisine. The target markets are: specialist food service providers (to this type of restaurant), and, health food and gourmet ingredient wholesalers.

Kenkey. The diaspora market is largely in the UK and is currently fully supplied. The market for a re-engineered white Kenkey is a relatively small sub-set of this niche. Actors in the food sector interviewed in the survey did not see a market opportunity for this product.

With respect to market access the key findings of the report were that no serious impediment exists to market access for this group of products.

Some concerns exist with respect to these products complying with private standards or certification due to the high costs involved.

1. Introduction

This report considers the factors that influence market access for re-engineered traditional foods from Africa. The products under investigation are Gowe, Akpan, Kenkey and Kiskh Sa'eedi which together form 'Group 1' of the range of African food products under investigation 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 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 additional questions applied to a sensory analysis questionnaire relating to consumers perception of the market possibilities of this set re-engineered, grain based, African products. 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 fiche give basic product information targeted at possible EU based buyers and food production/processing firms 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 1 products.

1.2 Methodology

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

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 24 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.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Table 1: Location and number of case studies

Product	Country			Total
	France	Portugal	United Kingdom	
Akpan	10	-	-	10
Gowe	-	5	-	5
Kenkey	-	-	2	2
Kiskh Sa'eedi	-	5	2	7
Total	10	10	4	24

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).
- The results of a consumer taste test of Kiskh Sa’eedi recipes (see Annex 4)
- 24 specific market studies for products in EU countries based on market interviews with key actors (see Annexe 2).

2. Product Description

The grains group of the AFTER Project consists of four traditional fermented products that have grain as a key ingredient. These are:

Akpan, a yoghurt-like preparation from the Republic of Benin made from fermented maize.

Gowé, a sweet paste, also from the Republic of Benin, made of malted (or non-malted) sorghum or maize flour and consumed as a beverage.

Kenkey, a stiff dough, from Ghana, made from fermented, de-hulled, maize meal and consumed as a stiff porridge or a beverage.

Kiskh Sa’eedi, a fermented snack and beverage from Egypt made from milk and wheat and consumed as a snack or beverage.

There is currently no trade or production in Akpan, Gowé or KS in Europe. Kenkey is made in a number of small scale ‘factories’ (effectively catering establishments) in the UK. Where substantial Ghanaian populations occur elsewhere in Europe (such as Paris) there is evidence that some local, informal, Kenkey production occurs.

This report focuses on market access opportunities for the re-engineered AFTER grain products. Table 2 below describes these. Detailed marketing ‘fiche’ is attached at Annex 3.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Table 2: Summary of key product facets

Facet	Akpan	Gowe	Kenkey	Kiskh Sa'eedi
Profile	Smooth, refreshing, energizing yoghurt drink from Benin	Sweet, 'malted', fermented, chilled, instant powder drink from Benin	Lightly fermented, doughy dumpling complementing meat & fish from Ghana	Dried, fermented cereal balls reconstituted as a drink or gourmet ingredient
Properties	Probiotic, stable, low glycaemic index	Nutritious, high in antioxidants, low sugar but high energy	Filling, smooth, neutral tasting	Low fat, high fibre, highly digestible, long shelf-life, rich in nutrients
Target consumer	Health conscious, sporty, lactose/glucose intolerant	Health conscious, 'free-from', vegetarian, lactose/gluten intolerant	Experimental, Ghanaian diaspora	Health conscious, gourmand
Place	Dairy isle, health food	Health food, instant drink, dietary supplement	Specialist African/world food outlets	Health food & Mediterranean specialty, delicatessen
Packaging	30cl ready-to-drink	500g polyethylene bag	500g vacuum packed	80g (10 balls) pouch
Price	€0.30 per 30cl bottle	€2.5 per bag	€2.5 per bag	€5 per pouch

The key properties/formats of the re-engineered Group 1 fermented grain products are:

- Akpan – food safe pre-prepared probiotic drink.
- Gowe – food safe, pre-packed instant flour.
- Kenkey – food safe, pre-prepared (instant flour and cooked), vacuum packed meal ingredient.
- Kiskh Sa'eedi – food safe, pre-prepared, dried balls in a pouch.

Photos of the re-engineered products are provided in the Product Profiles at Annex 3.

3. Possible market segments for re-engineered products

This section considers the potential market segments for AFTER Group 1 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.

3.1 Diaspora market segment

The key actors in the EU diaspora goods markets are shown in table 3:

Table 3: Typology of actors: diaspora market

Actor	Role
Diaspora goods importer/wholesaler	Brings bulk African food product into the EU and sells to wholesalers
Diaspora goods specialist importers	Brings certain specialist African products into EC (e.g. baobab powder)
Diaspora restaurant/catering suppliers	Buy catering ingredients from wholesalers and specialist importers and sells to restaurants
African restaurants	Buys African ingredients and sells meals to the diaspora and others
Diaspora specialist retailers	Buys a range of African foods and sells to the diaspora market
On-line diaspora retailers	Buys a range of African foods and sells to the diaspora market
Diaspora consumers	Buys African foods
Non-diaspora consumers	Buys African foods – often characterized by having lived in Africa and returned to the EC

3.2 Non-diaspora market segment

Akpan, Gowe

The main market for grain-based drinks is the specialist health food sector. There is increasing interest in the health benefits of whole grains (e.g. oats for management of prostate cancer in men) and grain-based drinks as part of a healthy diet. Recent research has demonstrated positive health impact from increased and regular fibre intake allied to greatly increased fresh fruit and vegetable consumption. These life and health enhancing properties are driving demand for new grain-based products. Niche markets include: vegetarianism, gluten-free, diabetic and pro-allergenic.

Kenkey

Kenkey in its present form does not really fit into any existing food category or sector. An instant Kenkey product might sit in the breakfast cereal or muesli market.

Kiskh Sa'eedi

There is no similar product to Kiskh Sa'eedi currently sold in the EU. Recent growth in interest in Mediterranean food as a result of Northern Europeans bringing back culinary experience from vacations has resulted in many new restaurants, and cuisine 'packages' in supermarkets (e.g., ranges of food packaged together so that consumers can make 'meals' from, say, Mexico, or India). So far, there is not much evidence of an Egyptian food movement, but Kiskh Sa'eedi could be a starting point.

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.

This analysis sets aside the diaspora market. As discussed above, the diaspora market is of quite limited scope and has relatively few barriers to access. Here we focus more on the possibility of re-engineered products (figure 1).

Figure 1: The Marketing Mix (prior to re-engineering): Group 1

<p><u>Product</u></p> <p>a) Akpan, Gowe and Kenkey sold as ‘instant flour’</p> <p>b) Akpan, Gowe and Kiskh Sa’eedi sold as a pro-biotic drink</p> <p>c) Kiskh Sa’eedi sold as a novel ‘Mediterranean’ food.</p>	<p><u>Price</u></p> <p>a) Compares with organic cassava flour at €3/kg</p> <p>b) Kefir grains (milk based grain probiotic from Turkey) sells for between €4-7/kg on the internet</p> <p>c) No comparable product, but typically sells in vacuum packs at about €2/100g</p>
<p><u>Place</u></p> <p>a) Health food stores and online</p> <p>b) Health foods stores and online</p> <p>c) Heath food restaurants, specialist Mediterranean restaurants, health food stores and online</p>	<p><u>Promotion</u></p> <p>a) Start at specialist organic and natural trade fairs</p> <p>b) Start at specialist organic and natural trade fairs</p> <p>c) Through catering suppliers and trade fairs as above.</p>
<p><u>People</u></p> <p>The market for specialist health food products addresses the needs of market sectors with specific health needs and is, therefore, largely unrelated to income. Increasingly, however, those with higher incomes in the EC are interested in buying health and wellbeing through diet and are prepared to pay for this, so the most promising market for these products is among higher income earners.</p>	

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Basic marketing mix analysis shows that there are more promising market possibilities for re-engineered AFTER products than might be expected. Key findings are:

- Presentation to specialist food fairs of ready to launch re-engineered AFTER foods is the most important market entry point.
- Relatively high prices are available to the ‘exotic’ food market
- Novelty and function are important in this consumer segment

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 was done (figure 2 and 3).

Figure 2: SWOT of Group 1 – diaspora product

Strengths	Weaknesses
a) Akpan, Gowe and Kenkey <ul style="list-style-type: none"> • Large potential markets: Benin diaspora in Paris and Kenkey in London/UK b) Kiskh Sa’eedi <ul style="list-style-type: none"> • Diaspora Egyptian communities in all major EU cities 	<ul style="list-style-type: none"> • Migrants tend to lose the taste for traditional foods over time
Opportunities	Threats
<ul style="list-style-type: none"> • Diaspora restaurants and specialist outlets (200+ in UK and France) • Online sales 	<ul style="list-style-type: none"> • Diaspora products made within the EU

Figure 3: SWOT of Group 1 - Probiotic drinks

Strengths	Weaknesses
<ul style="list-style-type: none"> • Novelty • Functionality • Grain based product with good health associations 	<ul style="list-style-type: none"> • ‘African’ foods not fully trusted as safe
Opportunities	Threats
<ul style="list-style-type: none"> • Fast growing speciality health probiotic grain drink market not very mature (so not a lot of competition) 	<ul style="list-style-type: none"> • Kefir grain

In summary, the SWOT analyses show that there is real potential for developing re-engineered AFTER products despite considerable evidence of competition. Novelty, functionality and health benefits seem to be the key to successfully finding markets.

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 Akpan

Product

The diaspora market is for dried, reconstitute at home, granules or flour such as Gari from Nigeria, Aklui from Togo or Degue from Senegal. It is also similar to Lben, a fermented milk well known to Maghrebians consumers.

Some African goods traders have sold Akpan paste in the past and are surprised to see the product presented in a liquid form.

The liquid form is preferred by all types of outlet if it is supported by promotion, free samples and a reasonably long shelf-life.

What kind of consumer will buy this product and why?

Interesting to many West African's. May sell in the health food drink sector near to the dairy products and probiotics.

Products of African origin are considered to be 'clean', natural and particularly pesticide free (because farmers cannot afford it).

What products are in the same marketing space?

In the diaspora market there are no similar pre-prepared products in the market space.

In the general market, Akpan is similar to various functional yoghurts and pro-biotic health giving life-style drinks.

What format would the consumer like?

Dried flour or pre-made liquid 'shot' forms are both appreciated. Some consumers prefer a clear or see-through packaging so they can see the product.

How important is shelf-life?

Two to three weeks is ideal for a liquid product. Flour's can stay on the shelf for up to six months.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Place

Most respondents agreed that Akpan would work in stores where there were West African consumers and in specialist health food supermarkets.

If well promoted, many respondents think that the Akpan drink would sell in specialist health food, organic or Mediterranean/Maghrebian stores.

Price

What price would the typical consumer pay?

Case studies showed that a range from €1.20 to €2.20 would be acceptable to most consumers.

Smaller units are preferred by retailers because the turn-over is higher and the margins are usually higher.

Typical price for a 30cl bottle would be €1.90 retail and € 1.20 wholesale.

Most respondents believed that they would not be able to sell more than one carton of 24 bottles a month.

Promotion

Free samples to get the product known would be essential. Merchandising at point of sale is important, but shelf-space for this type of product is very limited in specialist health stores.

Information and labelling is important. Country of origin, nutritional content and use instructions would all help. Labelling in French and English would be important in the French market.

For the diaspora market an African sounding brand name is important.

4.2 Gowe

Product

What kind of consumer will buy this product and why?

Gowe was considered a completely new product in the Portuguese market. For African produce outlets, health food stores and specialist food stores, it was believed that the target consumer would most likely be those who were already familiar with the product or the rather limited ‘experimental’ consumer who tries products purely for their novelty.

Several respondents noted that the ‘free-from’ market (i.e. gluten and lactose free) was vibrant and consists of consumers who are looking for new ‘free-from’ offers.

The fact that Gowe requires preparation is considered a problem in markets where it is completely unknown like Portugal. A program of education for consumers would be needed (one respondent suggested a food “Ambassador”), plus training and awareness for staff in-store.

What products are in the same marketing space?

Most respondents struggled to find a product similar to Gowe.

What format would the consumer like?

In Portugal, flours are commonly sold in paper bags with attractive labelling. A cardboard box format with plastic bag insert up to 500g is also well accepted for flours.

How important is shelf-life?

Most retailers expected a very long shelf-life for Gowe flour; some suggesting even up to a year. Specialist flours have a slow turn-over in small food stores.

Place

What type of outlet would typically sell this product?

Most respondents thought that Gowe would work best in specialist diet shops alongside ‘free-from’ and macrobiotic products.

Price

What price would the typical consumer pay?

Gowe flour in a box of 500g could retail for €2-3 per unit.

Promotion

Method of preparation and recommendations for use would be very important for Gowe because nobody knows how to use it. Promotion through food bloggers and star chefs is very important in Portugal and retailers mentioned how much this drives demand for specialist products.

Recipes and small on-line movies explaining how to prepare Gowe linked to the packaging and promotional material would be essential.

4.3 Kenkey

Product

The diaspora market is for specialist African restaurants, normally located in areas with substantial populations of Ghanaian origin (e.g., major UK cities and Paris). In London, Kenkey ‘factories’, which are mostly very small scale ‘kitchen’ level operations, produce both ga and fante style. Recognising the cultural drift of expatriate Ghanaians after some years (many were not born in Ghana), producers do not make a strongly fermented product, but tend towards an off-white Kenkey. Very white Kenkey is not preferred by the diaspora.

The ideal Kenkey should be medium soft, not shatter when cut and form a smooth ball in the hand with no stickiness.

There is a strong trade in bulk Kenkey for home freezing and special occasions such as weddings.

What kind of consumer will buy this product and why?

The re-engineered Kenkey can be acceptable to the diaspora consumer, however, manufacturers strongly emphasise the importance of ‘authentic’ methods and ingredients. Some even go so far as to import Ghanaian banana leaves to wrap their finished product and give it is ‘real’ Kenkey appearance.

A whiter, less aromatic Kenkey is likely to appeal to younger Kenkey consumers who are put off by the strong smell of traditional ga Kenkey. For African food outlets, the feeling is that less strong colours and flavours allow non-Kenkey consumers to try the product.

What products are in the same marketing space?

In the West African restaurant and food retail sector, ready-made Kenkey competes with the usual range of starchy staples such as ‘Banku’, ‘Gari’ and ‘Fufu’. It is interesting that some of these are becoming ubiquitous (e.g. all West African consumers seem to accept Gari), Kenkey remains a specialist Ghanaian dish. Offering Kenkey in a more easily acceptable ‘white’ re-engineered format may overcome this problem and drive new demand. ‘Dege’ and ‘Fula’ are also in demand, but nobody seems to be making these.

What format would the consumer like?

Diaspora consumers demand Kenkey presented in traditional maize leaves. However, as these are difficult to find in the UK, Kenkey is usually packed in polythene bags and chilled.

How important is shelf-life?

Kenkey is normally purchased and eaten within a week, so two week shelf-life is acceptable. Consumers buy in bulk to take to areas of the UK with no Kenkey outlets – then they freeze the product and need up to two months shelf-life.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Place

What type of outlet would typically sell this product?

Health food outlets would struggle to find a market for Kenkey outside areas with Ghanaian consumers. Kenkey is like no other similar product available in the UK. A similar product might be mashed potato, an important and traditional UK food, but this is either made at home from raw potatoes or from instant powder (which has declined in popularity).

In the diaspora sector, Kenkey sells largely via African restaurants with traditional food off-sales.

Price

What price would the typical consumer pay?

Kenkey retails for about €1.20 per ball/piece in London with a wholesale price of €1.00.

Promotion

What makes this product sell well?

Currently there is no promotion of Kenkey in the UK or France whatsoever beyond word of mouth. Promotion among the diaspora of a new re-engineered product would be done using the same method – but enhanced with active use of social media.

Persuading non-Ghanaians to consume re-engineered Kenkey would be very difficult outside the relatively small population of experimental gourmets and those with Ghanaian experience wanting to re-live this in the EU. This is not a small sub-population in major UK cities as reflected by the steady flow of non-Ghanaian customers in African restaurants. However, most restaurant owners said that non-West Africans tended to choose the Westernised dishes such as Jolof rice.

4.4 Kiskh Sa'eedi

Product

The market tested was for the African diaspora, the Mediterranean¹ and Maghrebian² sector and the Egyptian specialist food sectors as well as the general gourmand specialty and health food sectors. A 'dish' or specialty ingredient for the fast-expanding cuisines or a novel health food ingredient would, according to the case studies, work well.

The re-engineered products presented were: traditional KS balls for reconstitution as a food ingredient on dish compliment; and, a KS smoothie.

What kind of consumer will buy this product and why?

For KS balls the consumers will be those interested in experimentation and novelty. A typical consumer will be in a higher income group, interested in TV and newspaper recipes, regularly entertaining at home and visiting novelty restaurants.

KS smoothies will sell largely on taste. If made at home from balls, a pack of 8 would work so that you can have one a day.

In Portugal, KS would be considered highly 'experimental' and likely to be sought by gourmet and special diet consumers interested in added properties such as organic and macrobiotic.

What products are in the same marketing space?

Outside Egyptian and Eastern Mediterranean specialty food markets the product is unknown and has no serious competition.

In the UK there are no similar grain based Smoothie or 'porridge' balls, so KS would have real novelty.

There is nothing similar to KS in Portugal and respondents all struggled to find a comparable product.

What format would the consumer like?

Retailers considered that the presentation of KS would be critical to its success. High quality packaging with a good, clear story and recipe/use information is essential.

In Portugal the ball/box presentation was appreciated, but much more information about the product and how to prepare it as well as its key nutritional advantages, was expected.

How important is shelf-life?

The long shelf-life of KS is an advantage. In Portugal there was a common desire across the different types of respondents for a shelf-life of greater than six months.

¹ A concept emerging from evidence in the 1970's that the certain aspects of diets around the Mediterranean confer health benefits.

² A generic term for the cuisine of the North African coastal countries.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Place

What type of outlet would typically sell this product?

This product needs to be promoted to specialist food service wholesalers who supply small health food and the fast growing delicatessen sector in the UK. Most respondents in the UK did not think that larger, supermarket, outlets would work. All agreed that an on-line offer would be important.

Of the range of different retail formats in Portugal, all but the organic store thought that KS would not sell alongside their existing range. The healthfood sector liked KS but felt that they would need to experience it and build confidence and knowledge of the product before trying to retail it.

Price

What price would the typical consumer pay?

With the right packaging, most respondents agreed that a retail price of £5 (€5-6) would be easily achievable. Consumers of this sector are relatively indifferent to price. Retail mark-up is normally 35%. Most retailers buy from specialty wholesalers who require a further 25-30% mark-up.

There was a difference between the UK and Portugal on what should be an acceptable price for a 'pack' of KS balls. In the UK consumers are not too worried about price, but in Portugal, a price of €3 for 80g of KS balls is already considered at the high end of demand.

Promotion

What makes this product sell well?

The promotion strategy for KS is very important. The product needs to be explained and demonstrated. All respondents expected that it would be promoted to celebrity chefs (the UK chef Ottolenghi www.ottolenghi.co.uk was mentioned several times). Point of sale tasting, sampling and demonstration would be important as well.

A concept of Middle-Eastern or Egyptian food is generally less well understood in Portugal than in the UK.

5. Market entry requirements

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

5.1 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 standards³.

Reviewing the re-engineered products identified; Akpan, Gowe, Kiskh Sa'eedi and Kenkey, these are all foods and therefore do not fall within the ambit of the numerous speciality regulations that cover issues like novelty or health claims.

Manufacturing the re-engineered AFTER grain products within the EU would require full compliance with the EU Food Regulations and local food safety legislation for the products, their ingredients, their packaging and labelling.

Pre-prepared foods from third countries also have to comply with these regulations.

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 specific regulations relevant to AFTER products are considered in the next section.

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.

5.2 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.

³ See for example www.globalgap.org

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

5.2.1 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.⁴

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 principles 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**.

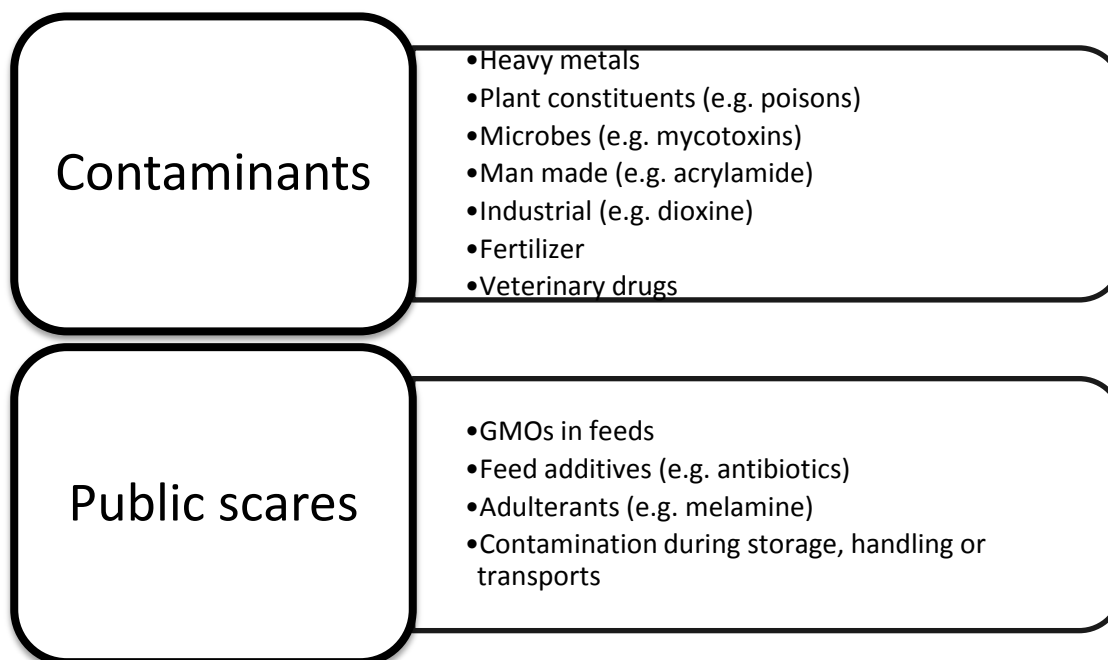
Food can also be rejected if it is unfit. This means that it is unacceptable due to contamination, presence of foreign objects, odour, putrefaction or decomposition.

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).

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 4.

⁴ The EU and UK Food Standards Agency websites have clear advice on how to comply

Figure 4: 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

- 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 important.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

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

c) Dairy and dairy products

Under EU Regulation 605/2010 strict rules apply to the importation of dairy products into the European Union. Third country authorization is required for each country or zone within a country.

Kiskh Sa’eedi contains fermented, dried milk and is defined as a ‘composite product’ under EU legislation (e.g., “foodstuff intended for human consumption that contains both processed products of animal origin and products of plant origin and includes those where the processing of the primary product is an integral part of the production of the final product” Commission Decision 2007/275/EC and Regulation No. 28/2012).

However, some composite products are not subject to veterinary checks. This derogation (Article 6) includes:

Composite products containing less than half of their substance of any other processed product provided such products are:

- Shelf-stable at ambient temperature or have clearly undergone in their manufacture a complete cooking or heat treatment process throughout their substance, so that any raw product is denatured;
- Clearly identified as intended for human consumption;
- Securely packaged or sealed in clean containers;
- Accompanied by a commercial document and labelled in an official language of a Member State, so that the document and labelling together give information on the nature, quantity and number of packages of the composite products, the country of origin, the manufacturer, and the ingredient.

On this basis, and provided that KS producers comply with the detail of Article 6, market access should be possible.

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 (table 4).

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Table 4: MRL risk and AFTER products

Product (local name)	Risk
Gowe, akpan, kenkey	Unregulated chemical use during production. Proximity to commercial farms using chemicals. Storage of grain near to household subject to anti-malarial spraying programmes. Re-use of bags or sacks.
Kiskh Sa'eedi	Unregulated chemical use during production of ingredients. Proximity to commercial farms using chemicals. Storage of grain near to household subject to anti-malarial spraying programmes. Contamination with household chemicals. Re-use of bags or sacks.

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')

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

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 AFTER grain products fall into this category as yet.

h) Novel foods

Originally introduced to protect EU consumers from unregulated import of the product of biotechnology (e.g. Genetically Modified Organisms), the Novel Foods Regulation (EC 258/97) also ‘captured’ some traditional foods such as baobab and so has been the subject of a number of revisions. Companies wanting to import foods and food ingredients that have not previously been in common safe use within the EU must apply for authorization and demonstrate safety through either science or by history of safe use. Application requires a professional dossier to be compiled. This can cost up to Euro 100,000 per application.

None of the AFTER re-engineered grain products would be deemed Novel Foods.

i) 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 5).

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Table 5: Assessment of aflatoxin risk of AFTER products

AFTER Product	Ingredients	Discussion	Aflatoxin risk (low to high)
Akpan	Sorghum Maize	Aflatoxin common in dried grains	Medium
Gowe	Sorghum Maize	Aflatoxin common in dried grains	Medium
Kenkey	Sorghum Maize	Aflatoxin common in dried grains	Medium
Kishk Sa'eedi	Milk Wheat	Depends on the diet of the source dairy cattle	Medium

Source: Authors opinion

Aflatoxin (and other mycotoxins) are a concern for AFTER and will have to be controlled in finished products.

j) Other contaminants

There are numerous other EU Directive relating to a wide range of potential food contaminants. None of these are obviously relevant to AFTER products assuming that general food hygiene and handling practices are applied.

k) Traditional Herbal Remedy Directive and Dietary Supplements (2004/24/EC)

None of the AFTER grain products are traditional herbal remedies. Products claiming pre or probiotic benefits which may be produced in the future (e.g., KS) may require clearance as a food supplement.

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

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

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 grain products because it makes market entry easier.

5.3 Summary of the regulatory challenges

Assuming compliance with basic food safety parameters for ingredients and manufacture, all AFTER grain products can access the EU market. For specialist ingredients (e.g. Seers milk for KS) particular care will be needed to comply. Extra attention will be needed to assure traceability.

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 grain-based 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.

5.4 The possibilities for 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.

5.4.1 Areas of certification

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

a) Fair trade

There has been a huge increase in interest by EU consumers in assuring that the producers of foods get paid a fair and reasonable proportion of the final on-shelf retail price for their products. A small number of consumers will only buy products with a fair trade label. The movement is stronger in some EU countries than others. For example, the fair trade movement has more market penetration in Germany than, say, Spain.

Fair trade certification requires third party inspection and may mean higher production costs. Premiums are usually in the 5-10% range. In order to have a fair trade certificate the Fair Trade Labelling Organisation (FLO)⁵ has to have a fair trade standard available. There are currently no fair trade standards for any of the AFTER grain based products.

In order to get fair trade certification production has to be from recognized groups or cooperatives (not individual farms).

⁵ See www.fairtrade.net

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

b) Organic certification

Organic foods do not use modern synthetic inputs such as inorganic fertilizer or pesticides. The organic movement is also interested in the environmental impact of food. To ensure compliance, the area of production has to be designated as free of non-accepted chemicals (this is called ‘conversion’) and products must be tested and inspected regularly. The cost of reduced productivity and lower quality is born by the producer in return for a premium. In recent years the demand for organic products has grown dramatically in the EU. However, the recent economic downturn has put pressure on premium products and the margin between premium and extra cost has declined.

Some market segments (e.g. health foods, traditional herbal remedies and food supplements) now expect organic certification.

In order to facilitate organic production some countries have developed national organic standards and regulations. As far as the author is aware, Ghana, Cameroon, Senegal, Egypt and Madagascar have national organic regulations. The position of Benin is unknown.

Different countries, markets and products use different organic certification bodies. The range is large⁶. Not all these bodies have representatives in AFTER countries. If there is no local representative of the certification body required by your chosen market then you have to pay for them to fly out to certify your production.

Most AFTER products are currently produced organically because small-holders do not have access to expensive external inputs such as fertilizers. Nevertheless, conversion to organically certified production can still be very difficult and costly. Most small-scale producers struggle to find the cost of regular certification.

c) 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 6.

⁶ See <http://www.organic.com.au/certify/>

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Table 6: 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)

The absence of GI or Sui generis protection in Egypt presents a risk for Kiskh. The only protection available is by Trademark, which does not help much for small producers making Kiskh Sa'eedi at home. Egypt should consider implementing the Sui generis system of protection as an interim measure.

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

d) 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.

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.

e) Other product specific certification - The Slow Food Movement

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

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

of local and small-scale production⁷. Members exist in Benin, Cameroon, Egypt, Ghana and Senegal but not in Madagascar. 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.

5.5 Summary of the potential for re-engineering through certification

Table 7 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 7: Assessment of certifications

Product	Type of certificate	Expected by markets	Will give premium
Akpan	Safety	No	No
Gowe	Safety	No	No
Kenkey	Safety	No	No
Kishk Sa'eedi	Appellation	No	Possibly

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.

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). In the case of Kishk Sa'eedi, it is likely that certification will open new niche market opportunities. Normally, certifications can be combined. So wild harvesting, organic and fair trade certifications together are not much more expensive than one certificate on its own.

⁷ See <http://www.slowfood.com>

6. Conclusions and recommendations

All AFTER grain based products can comply with the EU regulatory framework.

Special care will be needed to ensure that KS complies with the EU Dairy Product regulations under the derogation for composite products (Article 6).

These products may have some advantages in that their target markets are more tolerant of compliance differences.

Some investment in compliant supply chains will be necessary to meet the regulatory needs if products are made in third countries or if EU manufacture is with third country ingredients.

Compliance based re-engineering is only proposed for KS where the target market is particularly sensitive to certification.

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.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

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 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 if 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).

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

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).

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

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.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

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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AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

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
<hr/>		
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
<hr/>		
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
<hr/>		
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

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Head, Food and Markets Department

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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

This Project is Supervised by: Dr Dominique Pallet

UMR QualiSud Cirad Département PERSYST Montpellier, France

Contact Details (including telephone number):

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Annex 2: Product case studies

Case Study 1

Date: 12/2/14
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: Bissap, baobab

Customers are Africans from West or Central Africa, some Ghanaians. Product presented was bissap as a powder and as a concentrate. The customers for this product are Malians and Senegalese and the highest sale peak/consumption period is during the Ramadan. Ivoirians also buy the product there are less and tend to buy more ginger products. Powder product - it was not clear if it was a new product. Competitive product could be tamarind paste. Powder 100g in a clear packaging. Concentrate in a plastic or glass bottle. Cans were not the best presentation. Discussion about the shelf life of the concentrate (I have checked characteristics since and shelf life much longer 2 years). Discussion about the presentation of the concentrate. Diluted form (ready to drink would be better). African origin of the product is very important for customers and very positive. Expected 50 sachets of 250g each of bissap powder expected to sell per month. This was based on calculated volumes with Bouye (Baobab) powder 50bags of 250g per month 4.90 euros per sachet (foil aspect) whilst the Racine product with much nicer packaging was 2.90 euros per sachet only. Per month, the expected volume coming from the wholesaler to the shop would be 10kg equivalent to 1 cardboard box. The range of prices expected for the powder are 2-3 euros for 100g of powder and 2 euros for a drink made from concentrate in glass/plastic bottle (75 ml?). Margin expected between wholesale and retailer price is 35% on average and the typical payment terms is 30 days. The packaging for the products of bissap should indicate the origin of the product, the instructions on how to prepare the product (i.e. powder); no need for instructions if diluted drink. A picture representing the product would also be important to attract the consumer and a transparent/clear packaging (light through). Indicating that the product is natural is important because. When doing the promotion of the product, free samples would be good to attract the customer and discussion with customers about the product is important.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Case Study 2

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: Akpan

Family business. Ben's son was interviewed. Product selected was Akpan. Main customers are West Africa; Central Africa and especially Beninese and Togolese and also few Ghanaians. These consumers are used to maize products i.e. maize porridge and flour. The akpan presented here in the bottle seems more handy/practical compared to existing products since it is ready to eat. Other competitive products are Degue from Senegal made from millet and milk. Baobab drink is also a competitive product. Preferred packaging for the akpan drink would be 500ml bottle glass or plastic. The product should be in a clear packaging. Europeans come and buy the baobab product sometimes; this is because of its health properties. They heard about it from friends and are specifically interested in looking for African products which they think are more natural because people in Africa are poor and in their view can't afford to buy pesticides. African origin is an advantage both by African and European consumers. Expected sell of this product would be 100 bottles per month or 5 bottles per day. In order to promote the product, it should be promoted as new, free tasting of samples and be made visible in the shop. Discuss about the new product of akpan with consumers. From the wholesaler 1-2 cardboard boxes would be ordered containing 20 bottles each. Testing a product it is best ordering small volumes. The expected shelf life of the akpan would be 3 weeks. This is short but because it is a yogurt it is difficult to expect for longer shelf life. The price would be 1.5-2 euros and a maximum of 2.20 euros but it would be best to keep it under 2 euros. Payment terms would be 30 days with an average margin of 35%. The margin is higher on smaller products (=small bottles) but lower on bigger product sizes. In order to promote the product the packaging should have 100% African Product – Natural and possibly a picture. The packaging should be transparent so consumers can see the product's appearance. A brand would be necessary if there are several competitive akpan products on the market. Merchandising with free samples and clear visibility in the shop.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Case Study 3

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 4

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 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. 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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Report on marketing and regulatory opportunities for EU for group1

Case Study 5

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.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Case Study 6

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.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Case Study 7

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.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Case Study 8

Date: 08/08/14
Location: 17, Avenue de l'industrie 69960 Corbas
Type: Big, exotic food distributor
Product: Akpan
Contact: f.bandenavaze@mddistribution.eu

MB Distribution is a big store offering mainly African and Asian products intended for professional providers. They are 100% African. Their customers are African in general mainly Senegalese, Cameroonian and Congolese. The average customer age of customers is above 20, with men and mainly women (three generations). They belong to a medium-level economic group.

The product presented was Akpan.

It is a novelty for the business development manager.

The product origin is important according to her customers, because their own customers respond to their provenance.

According to Fhatima, the business development manager, customers for these products can be Africans who know the products, Congolese, Senegalese and Maghrebian, Beninese, Togolese, children and Muslims. If there are demand and customers for this kind of product, it might work; otherwise suspicious people will not buy it, though a few would try.

Akpan can be sold throughout the year, but we can imagine for the presented products small sales peaks during Ramadan and winter. The reasons why consumers tend to buy these products are their habits and during Ramadan.

Before selling a product, Fhatima first tastes, then she offers a sample. So, according to her, it's easy to persuade customers after this.

She can persuade consumers to buy these products by how she talks about them, especially if she has tasted it before, and finds it good, light and mild. She can use also ads with cooking recommendations, promotions, tasting, and also send e-mails presenting the new product for her marketing. According to her, the best position for the product is next to beverages, but not beer, and in the refrigerated section.

The packaging should indicate the shelf life, date of production, composition and above all the origin.

Regarding the packaging, clear/transparent plastic would be better, she mentioned a fresh and organic product, a glass or a carton of milk, or as it was presented in the picture (white plastic bottle).

The volume range should be 300 ml and the price range would be less than 5 euros. For the sachet format, prices expected should be less than 2.5 euros.

Expected sales are: 5x24 cartons per month and 10x24 cartons in Ramadan.

The monthly volume expected coming at first from the wholesaler to the shop would be at least 1x24, and at most 5x24, and more in Ramadan.

The shelf life of these products should be longer than 3 weeks. Margin expected for wholesale price is 40 % and for retail price 60 %. The typical payment term is 30 days. Products will be sold with the Racine brand name or other well-known ones.

According to Carla, these types of products would sell in Maghrebian stores or organic stores.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Case Study 9

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.

Case Study 10

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.

Case Study 11

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.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Case Study 12

Date: 08/14
Location: Quartier des Cévennes Montpellier
Type: Medium, Maghrebian food outlets
Product: Akpan

CARAMA is a medium-sized store offering mainly products intended for all consumers, in particularly Maghrebian ones.

The product presented was Akpan.

The product's name was not known in the store. After description, they compared it with Lben, fermented milk mainly consumed by Maghrebians, in terms of use and packaging method.

The manager said that he can persuade customers. At first, they will be African, then Maghrebian and finally French. Akpan can be used as a snack and fast food for dinner. It is easy to use and is cereal based. It can be sold year-round, but more in summer, and as a dessert in winter. He will recommend it as a new product to his customers. The reason why they will buy Akpan is that it is nourishing.

It will be unattractive for the seller if the shelf life is short, because in general they are limited by refrigerating equipment.

He proposed a small ½ format for single use. The packaging can be in boxes or sachets, but it must be protected from light and be easy to transport (20 units if wholesale).

It's complicated to produce this kind of product in Africa, especially as the African origin is not important. So it is better to produce it in situ.

The greater expected sales period will be in June, July and August. Regarding the price, it should be around €1.

Gowe and Kishk Sa'eedi

Case study 13

Date: 8/10/14

Location: Santa Catarina Street, Oporto

Type: Small, Exotic food- specially African foods, family owned.

Product: Baobab, Gowé and Kishk Sa'eedi

It is a small store that exclusively sells African food products and it is located in downtown Porto. Owners also have another shop, a hairdresser with hair products for African brands. This store is similar to the typical stores in the Greater Lisbon, neighbourhood stores directed towards selling typically African products, whose clients are mostly residents from the communities, majority Cabo Verdean and Guinean. The shop has little variety of food products, it is targeted for specific African products that are used in traditional African cuisine and consumed by this kind of client, for example, corn flour, cassava flour, couscous, palm oil, etc., and also frozen and refrigerated products from Africa.

In this store, although the husband manages the business, who volunteered to give the interview was the shop owner, but did not want her name and signature on any document with the risk of not responding to the questionnaire.

This store clients are largely from PALOPs countries and Cabo Verdean, although some clients are repatriated, who returned from the former colonies.

Products that were presented were the Baobab, Gowe and Kishk Sa'eedi and none of these existed in this store. The shop owner initially said that she was unaware of all these products. However, in the case of Baobab, although initially not recognizing the name Baobab, when she saw a picture of the fruit and syrup, immediately identified as being a tree, called the "imbomdeiro", "embomdeiro" or "Calabaceira", in Cabo Verde, with the same name for the fruit or "breadfruit", "Mukua" or "Malambe". As the shop owner explained, the designation of plants or fruits in Africa vary greatly from within countries and regions, even between ethnic groups, often known by different names.

However, the Baobab and the other two products are not sought in the shop. To market any of the three products in her store, she considered that African origin is an advantage once that her clients are Africans born and raised in Africa, some of them may even know these products, both for their nutritional properties or health benefits. The shop owner recognizes that in Africa the Baobab is considered a very good fruit for health and its consumption is even advised in cases of malaria.

However, she expects to find difficulties in placing this product to be sold, because of the knowledge lack of the products and raw materials which may constrain their sale. Although, she could introduce these products as novelties and highlight in all three products their benefits to

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

health, she did not believe in their success, once that her customer no not like to try new products and do not like to taste unfamiliar products. They are faithful to their roots and they do not usually buy different products. Additionally, as these products were submitted to reengineering, the customers also dislike processed foods as they usually say that the sensory characteristics of products are changed. Even publicizing the product in the store and through tasting, the customers would be reluctant to tasting and shopping these products, especially in the case of Kishk Sa'eedi.

She considers that there aren't products that can compete with the Gowé flour and Kishk Sa'eedi in the national market. Concerning Baobab, some can compete if the market product is a concentrated fruit, and she gave the example of some Brazilian fruit concentrates, such as concentrated Goiaba. Regarding the type of packaging, she considered appropriate for Baobab concentrate a transparent plastic bottle of 500 mL. In the case of flour Gowé, considered for marketing, bags of 500 g (polyethylene) or cardboard as a good solution, but could be sold in clear plastic bags, because African customers like to see the product they are buying and probably it would be cheaper. As for the packaging proposed for Kishk Sa'eedi, a box of 80 g seemed too refined for the type of customer who frequents her store and they would probably endear the final product.

For the shelf life of the products, she considered that they must all have at least more than six months, for Baobab concentrated juice the shelf life should be at least 6 months and if the Baobab powder is marketed, expected shelf life should be of at least 1 year. For flour Gowé, from 1 to 2 years and the Kishk Sa'eedi, a shelf life of at least six months. The range price expected for the Baobab plastic bottle (500 mL) was 2-3 €. As for gowé, she thinks that 2.5 € per bag of 500 g would be quite reasonable, because the price of some flours in her store is around 6 € the bags of 500 g. Regarding Kishk Sa'eedi box containing approx. 80g, she considered the suggested price of 5 € very expensive, and suggested 2-3 € /box as a good price. She suggested some marketing strategies as a Facebook page (although the shop has not yet a Facebook page), once that similar stores using Facebook include online sales and it would be a good alternative to advertise the introduction of a product in the store.

As some advertising actions to be implemented, as she does not usually introduce unfamiliar products at the store, it is unusual to resort to marketing campaigns in her shop. She does not believe in the importance of a trademark, because many of the products of her store do not have a trademark, only appearing on the packaging: the name of the product, country, preservation method, weight or quantity of the product and shelf life. However, she considers important to appear the country, in order to more easily identify these products. Finally, she considered that her store is not appropriate for the sale of these products, because these are more targeted for the African Francophone communities, while their main customers are from Lusophone communities. However, among the three products presented, possibly Baobab would have higher viable sales, followed by the flour Gowé, whereas Kishk Sa'eedi would not successful in her store.

Case study 14

Date: 13/10/14
Store name: Glood
Location: Dom Manuel II Avenue, Maia
Type of store: International food store
Type of business store: Medium, store franchise
Product: Baobab, Gowe and Kishk Sa'eedi

This store is defined as a grocery store of the world where it is possible to buy products from several continents; they have products from over 35 different countries. In the Greater Lisbon there are 5 identical stores, but this store is the only one in the Northern region, and currently the Glood stores operate as franchise.

In this store there are several products like naans from India; raz al hanout humus from Morocco; seaweed and rice for sushi from Japan; concentrated juices from America; Bilong from South Africa; ginger, curry genuine, diabetic jams, frozen in different types of bread, fish, sausages, cereal for breakfast in muesli versions and for those concerned with health, there is a bit of everything.

Store owners are two brothers who were emigrants in South Africa and who responded to the questionnaire was the sister, which is usually in the store. Many of their customers are also emigrants who returned from South Africa, and settled in the North. However, customers of this store are diverse, from clients who enjoy to travel and discover new flavours and unusual ingredients, full of willingness to try when coming back home, or people who love to watch cooking shows on television and looking for specific ingredients and also clients who are concerned about eating healthy products. This shop also organizes workshops.

Of the three products shown (Baobab, Gowe and Kishk Sa'eedi), she did not know any of the three, and considers that the potential customers for Baobab fruit powder or concentrates can be Africans who know these fruits or Brazilians who also consume exotic fruits concentrates or customers who purchase the product due to its nutritional properties. For flour Gowé, the potential consumers are the ones who know these products, as Africans or people who knew the product on trips or people with gluten or lactose intolerance. Regarding Kishk Sa'eedi, she believes that it will be more difficult to sell this product because the potential consumer will be probably a customer who already met this product on trips to Egypt. What can lead customers to buy these products will be mainly the nutritional characteristics of the product and the curiosity to try new flavours. She thinks that persuading potential consumers to buy these products, could be achieved highlighting its nutritional properties, however the lack of knowledge of the products and the fear that sometimes customers have to experiment could represent barriers to their sale, especially in the case the Kishk

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Sa'eedi, as she thinks the product presentation does not help. Once that all of the products are unknown on her shop, to overcome these difficulties, she thinks it would be good to promote these products to consumers. Advertising in the store, is a measure that would work well and they usually adapt the store when they want to put new products in line. For a few days, and they have a person to explain the type of product, highlighting its nutritional properties and its health benefits would be possible. Customers must be persuaded to taste the product or even be offered with small samples of the product, since hardly anyone will buy these products without knowing and tasting them, unless it is a curious customer and like to try new foods. Then, the product could be highlighted for some time on the shelf. At the same time, they could also advertise these products on the Facebook page of the store. The type of advertising with posters shown in the store windows is not adapted for this store, but could have small pamphlets with information of products, on top of the sales counter. Other marketing strategies would promote these products to chefs and bloggers. There are many followers of bloggers, they advertise on their blogs recipes and talk about products and have a lot of influence in the dissemination of an unknown product. Sometimes they are visited by bloggers who write about products bought in her shop, and almost always the demand for these products increases significantly.

The owner thinks that the products being practically unknown, the origin being Africa is a disadvantage, since people always have the fear of consuming in terms of food safety, although for Kishk Sa'eedi, its Egyptian origin may be an advantage, because people may consider it an exotic product. She thinks that there are no similar products in the national market that can compete with these. Regarding to the type of packaging, for Baobab, if this product is sold in powder, it might be placed in plastic bags, with 100-250 g, and as a concentrated juice, it could be in transparent bottles of 500 mL, as usually for identical products in her shop, for wholesale packaging 6-8 bottles. As for the flour Gowé, it could be sold in card boxes, plastic or paper bag with 500 g, while recognizing that card boxes are more presentable for the consumer, for wholesale packaging with 6-10 packs. Regarding Kishk Sa'eedi, she doubts that this is the ideal packaging for commercialization but maybe it will depend on the purpose of its consumption. If the product is to consume with snacks, in the form of balls as presented, she believes that the size of the box would be the ideal, however maybe typical format of cereal bars might be more advantageous. If this product is to be consumed cooked, she thinks that should also be sold with higher packaging, for household consumption. She believes that the packaging of the 3 products should bring, besides the mandatory information by legislation, especially in the case of Baobab, their nutritional properties and health benefits, and in the case of flour Gowé and Kishk Sa 'eedi, it would be also important to mention how to prepare and how to present the final product, tasting tips and/or recipes. She considers important to sell products that have a trademark, for example, or to try strong brands that are dedicated to the commercialization of identical products or importers/distributors conferring their mark, as very advantageous for customers to buy more. In the case of Baobab, a trade market of concentrated Brazilian juices would be an option, and for the consumption of Kishk Sa'eedi snack, maybe a company producing cereal bars. Interestingly, in the case of flour Gowé, if it is to market as diet product, is it not so important to have a trademark, but to highlight their most important properties. She believes that shelf life of these products is a very important factor in this type of store, since they have many products and when they are unknown and unpopular, they should have a large shelf

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

life. In the case of Baobab, at least 6 months, in the case of flour Gowé at least 12 months and in the case of Kishk Sa'eedi from 8 to 12 months. She considers that potential consumers would pay for Baobab, 2 € to 2.5 € for a bottle of 500 mL, for flour Gowé from 2 € to 3 € for box or bags of 500 g and by box of Kishk Sa'eedi with 80 g she considers from 2 € to 3 € a good price, and 5 € as very expensive for this amount. As the amount expected to sell in the store, although these products are unknown and their sale will be dependent on several factors, the experience with identical products in her store provides for Baobab 2 packs per month, for flour Gowé 10 packages and to Kishk Sa'eedi she does not have a forecast. The margin of profit it provides is identical to that obtained with other products in her store, from 30-40 %. Usually, the payment terms used in her store is 30 days, mainly for products with higher sales volume, if sometimes only buying a small amount of a given product, payment is made in the moment. Finally, she believes that her store would be ideal for selling powder or Baobab concentrate, being from the 3 products, the one which most pleased her. Considered that the Kishk Sa'eedi would not sell well in her store, but could possibly sell well in a macrobiotic store; the flour Gowé could even sell in her shop, but considers it an appropriate product for macrobiotic stores with healthy food. It is noteworthy that this store also sells dried meat, called Biltong on South Africa, and as there is demand for this type of product, probably would Kitoza as a similar product that could sell well in this store.

Case study 15

Date: 10/10/14
Location: Fernando Tomás Street, Oporto
Type of store: Grocery store or delicatessens/gourmet store
Type of business store: Medium, traditional old store, family owned. Historic shop (existing from 1934)
Store name: A Favorita do Bolhão
Product: Baobab, Gowe and Kishk Sa'eedi

The store is located in downtown Porto and with 76 years of existence, this business has been passed from parents to children. The products are geometrically organized in the shop windows, ranging from the genuine dried salted cod fish to a wide range of breads from all around the country. The store has a great selection of wine, nuts, dried fruits, cheese and deli meats. These types of groceries are much more than gourmet stores, they might come close to those delicatessens that exist around the world (the term is not recognized nor widely used in Portugal).

The owner's son who also works at the store spoke with us. The type of customers of this store are diverse, many are local residents from all ages but as it sits in the Porto city centre, it also has quite few tourists, who come to buy traditional Portuguese products and are curious to know what they have to sell from their countries.

Products presented were Baobab, Gowé and Kishk Sa'eedi, and these three products are not familiar to him and did not exist for sale in his store. He considered the potential consumers of these products may already be knowledgeable of them, specifically African people who seek this type of products or consumers who see the products for sale and feel willingness to try, customers that love to try new products with added health benefits. Usually customers do not seek this type of African products, however he has clients seeking organic food because it is advertised in the media or in social networks as being good for health, e.g. "Chia seed" or Goji Berries" which he sells in his shop, and which were unknown to the Portuguese and are now sought after by presenting excellent health benefits.

He believes the Africa origin of the products can be an advantage if customers specifically seek these products. However if customers do not know the products they can become more reluctant to purchase products from Africa for food safety reasons, customers still question products originating from these countries for reasons relative with food safety. He thinks in our market, there are some fruit concentrates or flour comparable to these, although with different nutritional characteristics, but in the case of Kishk Sa'eedi, he did not know any products that can compete with it. Regarding the type of packaging, he considered appropriate for Baobab powder the opaque plastic bags, like

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

powder packets jelly approx. 100 g, and if it is a concentrate it may be sold in bottles of 250 mL or 330 mL. For the flour Gowé, he considered the package shown photographically ideal, weighing 500 g to 750 g, and in the case of Kishk Sa'eedi he considered the carton box ideal. Beyond all the legal information that should appear on package labels, he thinks the on packaging of all products should also come explained the health benefits of each product. The shelf life that he considered appropriate for the Baobab powder would be 2 years and concentrates 1 year. Flour Gowé shelf life must be between 1 and 2 years and for Kishk Sa'eedi until at least 6 months.

Regarding the price that consumers would be willing to pay, for a Baobab bottle of 330 mL perhaps € 1.5; for flour Gowé the price indicated of 2.5 € seemed appropriated to him, and for Kishk Sa'eedi the indicated price of 5 € he thinks quite expensive for our market and suggested 3 € maximum. He can't predict what will be the sales volume is this type of product, as it depends on several factors, but perhaps 5-10 units per month. Gross margin he expected to get with these products would be equal to that which he obtains with most products he sells in its store, between 30 and 40%. Usually, the payment is made to suppliers to 30 days, but for some products he makes payment immediately because he has good discounts. As for the measures and marketing strategies that he considers appropriate for these products, he said that advertising by a nationally known nutritionist or already famous bloggers in this area, who advise products for healthy ingredients in recipes they publish. He considers that for these unknown products, tastings inside store are an important way of advertising as well as on Facebook, because the Facebook page of his store has quite a number of followers on this moment. While in his shop there are many products sold in bulk, they are usually products that consumers know, but for these products it is important that they have a trademark, because having a strong brand gives other consumer a safety idea. Of the three products he considers that Baobab powder or concentrate may be the one with the greatest potential to enter the market, since it is more for direct consumption and easier to use as a supplement for to other foods, and also believes that consumers are usually more likely to buy and consume drinks that foods when it comes to lesser known products. Even for its store, Baobab is the product that he considers will have more potential and in his opinion the flour Gowé and Kishk Sa'eedi could be more targeted products for macrobiotic stores or biological products, which consumers may seek for benefits in their food and buy healthy products.

Case study 16

Date: 14/10/14

Location: Rosário Street, Oporto

Type of store: Organic grocery store, retail supplies of biological products

Type of business store: Small, family owned.

Store name: Quintal bioshop

Product: Baobab, Gowe and Kishk Sa'eedi

The store is an organic grocery store with a coffee corner and a terrace with Wi-Fi. Their owners select brands that seek to combine quality and design, with the concern about being socially responsible and safe for the environment, and along with products from organic farming, the use of natural cosmetics and the use of natural methods of healing, such as homeopathy and naturopathy.

The store belongs to two brothers, and who talked to us was one of the shop owners. She is a very active young woman, informed and has the constant concern about placing in her store healthy products that are mostly organic products. Customers of his shop are diverse, they are residents of the area who will buy fresh vegetables of biological origin, and people with higher education who have the philosophy of healthy Lifestyle, they like to consume products of biological origin combining beneficial properties for health. Usually people of mixed ages, but mostly middle-aged, well informed and who enjoy travelling and are open to trying new products.

Baobab is a powder product that she would sell in her store. The flour Gowé and Kishk Sa'eedi are products unknown to her. Considers that the potential consumers of these products can be customers trained who like to buy novelties and dietary supplements. Also, may be customers with food intolerances, to whom there are still a reduced number of foods in our market. But in either case, the success of any of the products will go through for information of their health benefits that will reach out to potential customers in different ways. She thinks that potential clients are people seeking information on the internet, therefore this type of advertising in bloggers and Facebook can be very useful, if validated through scientific information and consumer tips and healthy recipes. In his shop she could put leaflets, do product tastings and offer small samples of each product so that people experience, sometimes also invite experts linked to the food area to give workshops, which would also be an opportunity to promote these products. Thinks that the price and the form of consumption of these products can however be limiting thereof.

Considers the African origin of these products may have advantages and disadvantages, as they depend largely on the type of consumer. Some customers are very selective regarding the origin of products, however others are not concerned with the origin of the product but with the benefits for their health.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

She recognizes that for Baobab, although there are very few products in our market that can compete with it, there is a Baobab brand product that she sells in her shop, Baobab 100% native dried powder (Ox natural) and there are other similar products as "Camu camu" originating from South America. Regarding the flour Gowé and Kishk Sa'eedi she cannot identify products that can compete with them.

The adequate packaging for Baobab is similar to the Baobab product she sells in her store (Fig 1.), the product has a plastic package of 125 g and is shielded from light as not to change the properties of the product; the Baobab concentrate may be a glass or plastic bottle with 500 mL. As flour Gowé, she has in the store different types of flour packaging, plastic bags, paper bags and cardboard boxes, the most common with the weight of 0.5 to 1 Kg, personally pleasing her paper bags wholesale. Regarding the Kishk Sa'eedi, she considers the shown packaging proper but somewhat small, however the price and type of consumption of this product also condition the type of packaging. In its store packaging wholesale typically contains 6 to 12 boxes or bottles. Regarding the price considered ideal for these products, she recognizes this Baobab fruit as an expensive product, the powder she has for sale of brand "nature Ox" costs about 7.5 € packing 125 g, although the brand is certified for marketing of organic products, which in itself enhances the product, the Baobab is sold as a concentrate, a bottle of 500 mL which can cost between 2-3 €. As flour Gowé, the price indicated of 2.5 € seems good to her because she has other more expensive flour in her store. Regarding the Kishk Sa'eedi presented for packing 80g, 3 € seems an appropriate value. As for a prediction of quantity and sales volume relative to the Baobab, she believes it could sell 3 packs, for flour Gowé possibly 2-3 packs, but for the Kishk Sa'eedi she cannot make a prediction for being the most different product. Gross margin she would expect to get with these products will be equal to the majority of the products she sells in her store, which is between 30 and 40%. Usually the payment to suppliers is made in 30 days or for small amounts she pays immediately. She considers that these products should have a strong trademark, because it will be easier to put them on the market. In the case of Baobab it could use Super-Food brands that already exist in the market (e.g. Ox nature, Föld, Biosamara, etc.) and it would have easier distribution channels. She believes that Baobab and flour Gowé are products with potential that could easily be introduced in their store, although the Baobab has the most potential, the Kishk Sa'eedi if well publicized could possibly also market it, the store owner was very curious about this product, stating that she would like to taste it.

Case study 17

Date: 30/09/14
Location: Rua do Outeiro, Gemunde, Maia
Type of company: Agro-industry
Type of business company: Large company
Store name: Frulact
Product: Baobab, Gowe and Kishk Sa'eedi

Frulact is a food industry company specialized in fruit processing, headquartered in Maia, Portugal. Its aim is the manufacture of food products like fruit compounds for food industries. It produces fruit based products by developing fruit transformation activities in a number of different ways. At this survey, answered by the Director of Innovation and Quality, to whom we ask for an input as representing Frulact. She considers that potential consumers of Baobab may be young and seniors, who buy this product by curiosity and by its distinctive nutritional value, while in the case of flour Gowé, consumers may be curious and people familiar with the product in the original version, who purchase for African ethnicity. For the Kishk Sa'eedi, consumers may be children and young people or travellers who have become familiar with the product in its original geography and may be curious in trying this product. She considered as an advantage being an African product for Baobab and Kishk Sa'eedi, but for flour Gowé she is not sure. In our market there are products that can compete with Baobab, like yogurt and some drinks and in the case of Kishk Sa'eedi e.g. dehydrated fruit snacks, but can't find products in our market products that can compete with the flour Gowé.

She considers that the appropriate packaging for Baobab powder, sachets to enrich the existing product and packaging should highlight the nutrition information and the geographical origin of the product; in the case of flour Gowé in boxes or bags of 500 g or in smaller bags to be able to try, highlighting the nutritional properties of products and the health benefits with e.g. the absence of gluten; and for Kishk Sa'eedi bags with snacks, should contain nutrition information on the packaging referring to the fact that it is a natural product without food additives. As regards the shelf life she considered that dry food should have at least 6 months.

In the questions of marketing and advertising of products, she believes that information campaigns highlighting the nutritional properties of these products will be very useful, in the case of flour Gowé should highlight the fact that it is an alternative to gluten and lactose intolerant people and for Kishk Sa'eedi the fact that a natural and healthy snacks. Difficulties likely to arise because they are virtually unknown products for Portuguese consumers, the issue of habituation to these new flavours will be a problem to overcome, and the problem that they are not prepared for direct consumption, as in the case of flour Gowé, that requires reconstitution of these products in your market. The product price may also be a limiting factor in sales too. Some marketing strategies that she considers that would be successful for the launch of these products in the market would be for

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

example an advertising campaign launched by an "ambassador" who may be a public figure (African preferably), who teaches as to prepare and consume the products. In retail outlets what can be done is launch with tastings of products, with a knowledgeable person in store, to clarify how consumers can consume and prepare these products. May be advertised in stores through leaflets for each product and placing small movies on their websites or Facebook. For any of the three products considered, it is important to have a trademark connected to the geographical origin of each product. The questions about the selling price of products as the company has no direct sale of products were not responded relating to this subject due to lack of data. But she considered that this type of products can be commercialized in specialized types of stores, grocery stores or gourmet shops and online sales. The product that she claims to have the greatest potential to be released in the market is the Baobab, among the three products, as probably the only one that some consumers already know and for its flavour also appealing.

AFTER (G.A n°245025) – Deliverable 5.1.1.1
Report on marketing and regulatory opportunities for EU for group1

Kiskh Sa'eedi

Case study 18

Date:

Location

Type: Large specialty food outlet

Product: Kiskh Sa'eedi (KS)

Type of consumers frequenting the shop. 40+ and 60+ people who have time. People who don't work. People who spend time cooking. Café: people looking for the experience. Prices higher than in supermarkets. E.g. Jam £2.5. similar interests of customers in Waitrose and John Lewis, M&S but here people are more cooking oriented.

Presented kiskh Sa'eedi. Type of consumers of kiskh sa'eedi. Those who know the product. Egyptians. Ethnic group.

The product needs to taste good to be adopted. Display will be a good way to advertise with for instance a student who can encourage people taste the product and talk about it (historicity...). Nutritional aspect is secondary for people because they are other products with nutritional benefits. Brits are used to Asian and European cuisine but not to African cuisine. The African (i.e. sub-Saharan) origin of the product might be worrying for average UK consumers. North African (i.e. Egyptian) better. A way to overcome this might be to ask well-known chefs to promote these products through the media. If the kiskh is used as a dried product (ball), there won't be many products like this. If it is used in the form of a smoothie, other competing products would be dairy smoothies and in a cereal bar, same. The quantities of products they hope to sell would be small: no more than 24 kiskh per month for instance 2 cases of 12 bottles (if smoothie) each. It might be better for profit to use smaller cases size. There is a lot of work on the packaging needed to ensure the best one. Kiskh sa'eedi could also be presented as 'power balls' individuals or packs of 3. The shelf life might be very long (endless) if the product is dried (6-12 months).

The kind of market, outlet where the product would be easier to promote is the health market because consumers go there with the view of buying health products. In their shop in Faversham they will have to talk to the customer to promote the product. Webshop can also be good to increase sales. Individual smoothie nicely packed £2 and 8 balls (one for each day) £5. Their margin is 35% and the payment terms normally are of 30 days. If the supplier is new in some cases, you can pay upfront. It is good to have a direct contact with the producer of the product (e.g. in Egypt). The best way to promote such as product would be to ask a well know chef on TV (e.g. Italian name) for the launch of the product. Also have individuals talking and distributing samples to customers. Information on the packaging should be how it is used; this is very important because if customers don't prepare the product well it might not taste the right way (e.g. greentea). Branding is also important for the promotion of the product.

Kenkey

Case Study 19

Date: 23rd March 2014
Location: Peckham High Street, London
Type: Small scale producer and retailer
Product: Kenkey

Eve Azu started her Kenkey selling business in her home kitchen eight years ago and moved into a restaurant slot in Peckham High Street when demand outstripped her ability to make the product from home.

She considers her business to be a restaurant that has off-sales of Kenkey rather than a Kenkey factory. She used to do a lot of wholesale and catering sales of Kenkey, but has reduced her production, mainly because of the challenges associated with supervising the manufacture of Kenkey. She claims that her process is very important and that this gives her a market advantage over other suppliers. Her experience is that, when she expanded, her staff did not follow the recipe and process correctly which resulted in over fermentation, over cooking and inadequate hygiene. Consistency and quality are important to her customers and she has cut back her scale of production to ensure she meets these expectations.

The great majority of her customers are of African descent, but she has about 5% Europeans at the restaurant. Most of the Europeans are people who have been to Ghana and previously tried Kenkey. Europeans coming to her restaurant for an African culinary 'experience' normally try food that is a bit closer to their previous experience like Jollof Rice. The strong aroma of Kenkey is not very appreciated none regular consumers (i.e., people who have not been eating Kenkey since childhood).

The majority of her customers are from Ghana or Nigeria. There is a wide range of ages and social background, including a health number of young professionals seeking authentic traditional food.

On the re-engineered Kenkey she says "this new Kenkey is close to mine". She makes a white, Fante-style, product presented in maize leaves imported directly from Ghana (UK£40 for 10-15kg delivered to UK). She claims the Ghanaian maize leaves confer a special flavour on her Kenkey. Her Kenkey is made with a range of flours sourced from Kenya, South Africa and Ghana and then blended by her in the kitchen.

She says that Kenkey that is too white or too grey is not appreciated by her clients: her product falls between these two and so is a kind of 'ga' and 'fante' Kenkey mix.

She thinks that the new Kenkey would appeal most to younger consumers. Older consumers are more fixed in their ways. The aroma of Kenkey is very critical to people's enjoyment of it. She

Report on marketing and regulatory opportunities for EU for group 1

thinks that having a smell that is too strong puts some customers off. She also thinks that value for money is important to their customers.

To promote a new Kenkey product she would offer people free samples in her restaurant first and then give samples to important customers to take home. She thinks that the concept of an 'improved' Kenkey would be attractive, but was concerned that if you call it 'improved' people might ask what was wrong with the old recipe.

In her view a perfect Kenkey should be "medium soft", not shatter when cut, form a smooth ball in the hand and have no stickiness.

Kenkey is a substitute for Banku (which she also makes). Banku is smoother – because it contains some cassava flour.

She sells her Kenkey in the traditional mode: wrapped in maize leaves. She is convinced that the maize leaves confer extra 'taste' but agrees that this may be simply psychological as people are used to having it presented in this way. She sells Banku in plastic bags. The typical size is about 500g. In her experience Kenkey does not sell if put in bags or tin foil. She sells 500 'pieces' of Kenkey a day. Wholesale she packages 50 pieces together in a box on order. Many people buy Kenkey to take as a present to Ghanaians living in parts of the UK where it is not made. This group of bulk purchasers often freeze the product for storage. A shelf-life of 3-4 months is expected if refrigerated, but it keeps for 2 weeks at ambient temperature. Most of her consumers buy daily.

She sells Kenkey as a 'plate' with other ingredients in the restaurant, but in a two piece bundle for off-sales. The price is £2 for two pieces retail and £1.40 wholesale.

Her main competitors in London are 'Viva Afrik' in Leyton, and May Foods in Brixton. Apart from Banku, there is a strong demand for 'Dege' and 'Fula' but she is unable to make these. She has never heard of 'Akpan' or 'Gowe'.

The majority of her promotion is by word of mouth. She has never done any advertising as she says she barely meets demand now without any promotion. She thinks that branding her product would be a really good idea, but has not tried it. She offers free sauces (tomato, brown) with Kenkey because this has become the protocol for take-away food in the UK.

Annex3: Product Marketing Fiche

Akpan: a new vegetable yoghurt drink

A ready-to-drink smooth vegetable yoghurt from maize

A new refreshing product 100% natural

A low-calorie beverage, gluten free

> Akpan is a real vegetable yoghurt drink originally prepared in Benin (West Africa). It is prepared with "Ogui" or "Mawé", fermented purées of maize partially cooked, traditionally formulated with sugar, ice or still with condensed milk.

What are the key properties of Akpan?

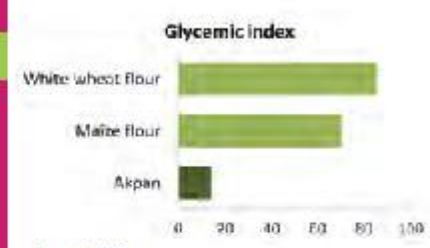
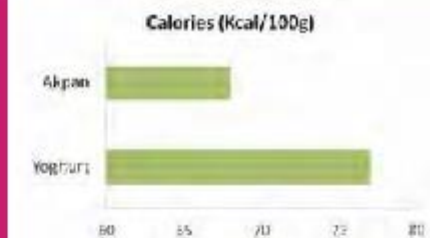
Energy drink with low rate of sugars and lipids, Akpan is an interesting alternative to yoghurt for vegans (without milk). It is also adapted to people who have gluten intolerance.

The important part of slow carbohydrates (uncooked / gelatinize starch) confers it a low glycemic index, doubtless suited for diabetics and sportsmen. The presence of active lactic ferments confers also qualities related to probiotics.

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.



The Gowé flour or How to prepare your own vegetable yoghurt drink



A high nutritional flour from sorghum

Sour and sweet with a pleasant flavour

Easily digestible

Gluten-free



Sorghum seeds during traditional germination © AFTER Project

> Gowé is an energy-giving and refreshing drink from Benin (West Africa). It is derived from a fermented dough obtained from red sorghum, of which a part of grains is malted. Traditionally sold wrapped in vegetable leaves, the dough is diluted in some water. It is up to anyone then to add some sugar, milk and ice cubes to obtain a refreshing vegetable yoghurt.

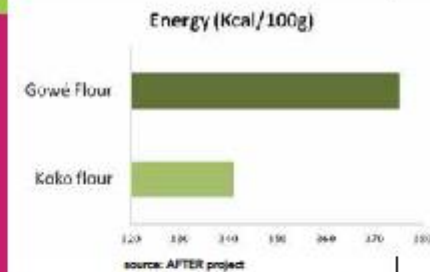
Gowé is naturally sweet and sour, with a pleasant malted flavour.



What are Gowé reported properties? Why would you drink it?

Its high content of malt gives him a high digestibility compared to the other traditional fermented products (Akpan, akui, koko). The total hydrolysis of starch during the preparation facilitates the digestibility and malting gives specific nutritional qualities.

It is a yoghurt substitute for vegans or people with gluten/lactose allergies.



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AFTER

African Food Tradition Revisited by Research

Fresh dough of white Kenkey



A Guinean traditional food revisited

A new product 100% natural

Let's taste a new nutritious and affordable food

> Kenkey is traditional food from Ghana in West Africa. It is a dumpling with a sticky texture, sour in taste, which is prepared from maize grains after it has been processed into a fermented meal. It is traditionally consumed as a main meal served with fried or grilled fish and an accompanying sauce or soup.

What are the reported key properties of White Kenkey?

White kenkey has been re-engineered from the traditional kenkey process to give it a more universal appeal. Rather than whole grains, it is produced from polished or degermed maize grains, with carefully controlled steeping and fermentation duration and temperatures.

It has a less sour and a more bland taste compared to the very sour acquired taste of traditional kenkey. White kenkey has a more attractive and appealing color and is smoother on the tongue than traditional kenkey.

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Traditional Kenkey packaged in leaves. © AFTER Project



Fresh dough of white Kenkey © AFTER Project



Kishk Sa'eedi

A totally new product out of Egypt

Health promoting and easily digestible

With high quality nutrients

New packaging for Kishk Sa'eedi dried



> Kishk Sa'eedi (KS) is a wheat-based traditional product made from fermented buttermilk and crushed whole wheat grains.

KS is an important component of the traditional Egyptian (Mediterranean type) food system and shares the same features and health promoting qualities of the Mediterranean Diet, declared by UNESCO as an Intangible World Heritage.

The traditional final product is available in the form of small dried balls or nuggets that are light in weight, which present a smoothed or a rough grainy surface. The color, light beige, reflects the combined natural colors of the wheat and milk ingredients.

richer source for the B vitamins than for milk or wheat on their own. It also enhances the bioavailability of the calcium, iron, magnesium and zinc content.

No artificial aroma or color additives or chemical preservative agents are used. KS possesses a characteristic pleasant aroma and flavor and bears the slightly acidic taste of the fermented buttermilk.

It is a typical Mediterranean style health promoting food and is produced by an eco-friendly production process, with excellent preservation qualities.

What are the reported key properties of Kishk Sa'eedi?

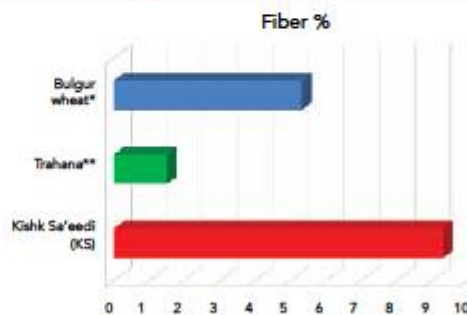
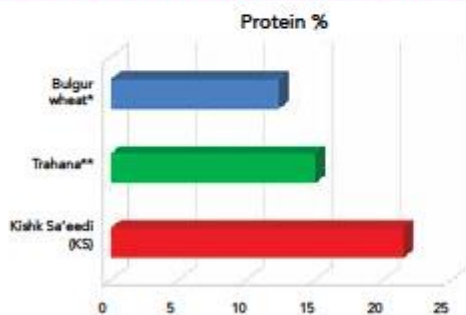
KS is a health promoting easily digestible product with high quality nutrients that are bioavailable. It is a low fat high fiber food product that is a source of balanced essential amino acids derived from combining the milk and wheat proteins.

The process of production of KS that involves the fermentation of a wheat and buttermilk mixture produces a food product of high digestibility and high biological value. The fermentation process makes it a

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*Source: Nutrition Facts and Food Composition Analysis. nutritionanalyse.com

**Source: Georgala A (2013) The Nutritional Value of Two Fermented Milk/Cereal Foods Named 'Greek Trahanas' and 'Turkish Trahanas': A Review. Journal Nutr Disorders and Therapy. S11: 002. doi:10.4172/2161-0509.S11-002

Trahanas is traditional fermented milk-cereal products fermented by whole fresh ewes', goats' milk or a mixture of them.



AFTER African Food Tradition Revisited by Research

Annex 4: Result of consumer focus group taste test of Kishk Sa’eedi recipes





Introduction and method

Kishk Sa’eedi is a wheat based traditional product made from fermented buttermilk and crushed whole wheat grains. It is a traditional Egyptian food, low in fat and high in fibre content and rich in minerals and other essential micronutrients.

The food is completely unknown in Europe. In order to have a better understanding of Kishk Sa’eedi before conducting interviews on its possible EU market, it was decided that a taste profile would be conducted using a 5 person consumer focus group. The aim was to better understand how KS is used in traditional Egyptian foods by replicating some traditional and new recipes containing KS in different forms.

KS is presented to the consumer at point of sale in the form of small, dried ‘balls’. These are then reconstituted at home to make various different dishes and drinks, or are consumed directly as a dry snack. For this test, we focused on recipes made up from dried balls.

Four traditional recipes provided by experts in Egypt were tested (Habiba Wassef pers comms): KS ‘porridge’ with chicken, KS ‘porridge’ with eggs, fried KS with cheese, and, KS ‘porridge with egg and vegetables (see figure below).

1. KS with chicken	2. KS with eggs
	
3. Fried KS with cheese	4. KS with egg and vegetables
	

Sources: 1. & 2. Habiba H Wassef, 3. Emad El Khesht, 4. Maggi Habib

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The four recipes were made up according to instructions received from the Egyptian colleagues and were taste tested by a panel of five with the aim of finding which recipe might be most preferred by European consumers and to develop a list of descriptive words that help define four essential characteristics of the product: appearance, odour, taste and texture. The focus group consisted of five members with a fair ethnic diversity (2 x French, 2 x UK, 1 x Netherlands).

Results and findings

The results are presented in the table below.

The highest ranked recipe was KS with vegetables and eggs. This was considered to be tasty and wholesome with good mouth feel (“nice combination of textures”), fresh smell and an “inviting” appearance.

The traditional KS porridge with chicken was next best received by the panel. This was considered a bit “brown” in appearance with an “earthy” smell, but was much enjoyed from the perspective of taste (“hearty”) and texture (“smooth” and “soft”).

The egg and cheese variants were ranked lowest, but still enjoyed by the panel. In both cases the slightly fermented and sour flavour of the KS was noted, a feature that does not seem to be preferred by European consumers.

All recipes were considered reasonably easy to prepare from the basic KS balls. The panel appreciated aspects of all the different KS formats presented, but clearly preferred recipes where the strong fermented flavour of KS took a back seat.

This finding suggests two possible pathways for developing KS as a recipe ingredient. Firstly, it points towards a product where the strong fermented flavour and odour is a consumer advantage. For example, as a condiment where the strong flavour is a feature of the dish, or in Egyptian restaurants. The second possible product group might be when KS is presented in a main course, a less flavoured product will provide balance to a dish that is not distinctively or uniquely ‘Egyptian’ in character.

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Criteria	Recipe (rank 1 = favourite)			
	Veg + Egg (1)	Egg (3)	Cheese (4)	KS & chicken (2)
Appearance	<ul style="list-style-type: none"> • Colourful • Inviting • Tasty • Looks tasty • Green • Orange • Yellow • Omelette • Varied colours and shapes 	<ul style="list-style-type: none"> • Simple • Dry • Eggs • Tomato • Cereals • Brown • Better than similar wheat products • Pale 	<ul style="list-style-type: none"> • Cereal-like • Breakfast-like • Yellow • Cheese • Creamy • Not much colour variation • Yellow 	<ul style="list-style-type: none"> • Not colourful • earthy like soup • Light brown • Dark brown (onions) • Brown with dark round bits • Like dark porridge • Interesting with dark onions • A bit grey
Odour	<ul style="list-style-type: none"> • Smell like vegetable • Fruity • Eggs • Peppery • Meat • Fresh 	<ul style="list-style-type: none"> • Pungent • Milky • Eggs • Sweet • Fermented • Musty 	<ul style="list-style-type: none"> • Butter smell • Milky • Eggs • Sweet • Creamy • Slightly sour 	<ul style="list-style-type: none"> • Onion smell • Earthy • Almost none • Meaty
Taste	<ul style="list-style-type: none"> • Fresh • Kiskh taste of egg • Cereal • Egg • Milk • Vegetable • Peppery/spicy • Sweet • Delicious • Flavoursome • Good salt/pepper/acid ratio • Mild • Wholesome 	<ul style="list-style-type: none"> • Tomato • Creamy aftertaste • Egg • Omelette • Fermented • Sweet • Spicy • Sour • Slightly too acidic • Wheaty 	<ul style="list-style-type: none"> • Onion taste. • Creamy aftertaste • Like an omelette • Milky • Cheesy • Fresh when combined with cheese • Smooth 	<ul style="list-style-type: none"> • Chicken soup • Onion • Soft • No strong 'Kiskh' flavour • Sweet • Watery • Sharp • Lovely combination • Hearty • Sweet and sour
Texture	<ul style="list-style-type: none"> • Soft • Veggie texture • Slightly crunchy • Chunky • Nice combination of textures • Picant 	<ul style="list-style-type: none"> • Soft and Chewy • Like bulgur wheat • Gritty • Bitty • A bit dry • Pleasant granular texture • Chunky 	<ul style="list-style-type: none"> • Soft and chewy • Like bulgur wheat • Soft • Smooth • Fine, not too dry • Soft 	<ul style="list-style-type: none"> • Smooth • Very smooth • Good combination of heterogeneous texture: soft sauce with fibrous meat (chicken) • Soft • Porridge-like

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