

Appendix 7a: Product Scan

Study to identify viable business propositions for the dairy industry targeting lower income consumers



Introduction

- The retail outlet mapping is part of SNV's "Study to identify viable business propositions for the dairy industry targeting lower income consumers". Among the many objectives of this research was the following:
 - Carry out a market review or inventory of processed products available for the lower income groups in a number of countries in the East and Southern African region (including RSA), and identify possible new products for the Kenyan market.
- To meet this objective, we sent scouts in 9 African countries to record images of dairy products in 1 supermarket, 3 local shops and 3 kiosks/tabletops: Burundi, Ethiopia, Ghana, Kenya, Mozambique, Nigeria, Rwanda, Tanzania and Uganda. In a 10th market, the Republic of South Africa, our scout was met with such hostility from outlet owners that we aborted his scouting mission for security concerns.
- The scouts also recorded the product type, the brand/product name, the packed volume and the price in local currency. We recalculated these prices into USD and converted volumes to provide an overview of the prices in different countries.
- The scouts registered a total of 1072 products. A full list of all products and the associated images is attached to this report (which also includes about 150 non-dairy products).

Usage of the data

- This report summarizes the products found and their price levels. Further detail on all the products is attached as a separate excel file and a connected image database.
- The overview is illustrative rather than representative. Given that the scouts worked unsupervised , consistency between their different efforts was difficult to monitor.
- We have tagged every image with country, outlet type and product type, to make a picture selection easy. The free Picasa software has been used to attach the tags and the client will have to install Picasa in order to view the tags.
- The main purpose of the images is to inspire ideas among stakeholders. Those in the dairy industry will note many peculiarities (e.g. packaging styles, printing techniques, marketing messages,...) that are impossible to spot for those who are not in the sector. We therefore encourage KMDP to share random selections of the images during stakeholder workshops.
- The second purpose is to raise questions about differences between African markets. On the next slide, we have highlighted a few of those differences.
- Finally, the images should come in useful whenever SNV wishes to illustrate presentations and reports. It should be one of the largest African dairy product image databases in existence.

Key findings

- If a product works in one African market, it might be worthwhile testing a similar product in Kenya.
 - “Other dairy products” were mostly found at supermarkets and, to a lesser extent, at local stores. These included baby formula (mostly Nestlé and milk chocolate (though not all scouts might have identified chocolate as a dairy product).
 - Evaporated/condensed milk was widely found in Nigeria and Ghana. It is a popular treat for children and, in addition, consumed in a similar way to mala (sour milk) in Kenya.
 - Non-dairy products that some of our scouts identified as dairy products included , mayonnaise and soy milk.
- Products that do not reach BoP markets in Kenya, might reach the BoP in other African countries.
 - Burundi and Ethiopia have the widest range of products reaching the kiosks and tabletops, including butter, cheese, and flavoured yoghurt. Rwanda and Eastern Uganda also have a cheese culture, though the scout sample did not identify this, since the cheese is often sold by dedicated, mobile cheese sellers.
 - Across all outlet types, the scout in Nigeria identified the broadest range of products.
- The scouts found very few occurrences of raw milk. This would mostly be sold through other outlet types than those sampled by our scouts.
- Prices vary significantly between and within countries. Our sample sizes are too small and the package sizes compared too varied to analyze the price data in depth.

Product type sample size

	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda	Total
Milk powder	23	3	96	0	11	67	16	83	0	299
Processed milk (unflavored)	1	20	26	60	28	0	7	46	24	212
Processed milk (flavored)	32	0	11	3	7	19	15	5	3	95
Yoghurt (flavored)	14	9	0	17	11	7	10	15	10	93
Cheese	7	14	1	0	17	2	3	1	0	45
Yoghurt (unflavored)	0	14	0	1	8	5	7	10	0	45
Evaporated milk	0	0	7	0	0	31	0	0	0	38
Ice cream	1	9	5	0	0	5	0	12	4	36
Butter	7	16	0	1	0	2	0	7	0	33
Cream	0	1	0	0	8	14	0	0	0	23
Raw milk	4	0	0	0	0	2	0	0	2	8
Sour milk	2	0	0	5	0	0	0	0	0	7

Pricing/Butter

Product type	Butter								
Measurement unit	Kilogrammes								

Minimum price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	6.68	7.97	0.00	0.00	0.00	19.31	0.00	12.63	0.00
Small store	6.41	7.05	0.00	9.52	0.00	0.00	0.00	12.00	0.00
Kiosk/tabletop	6.68	3.31	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Maximum of price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	6.68	23.18	0.00	0.00	0.00	20.91	0.00	13.91	0.00
Small store	6.41	11.04	0.00	9.52	0.00	0.00	0.00	13.21	0.00
Kiosk/tabletop	6.68	8.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Sample size, n=33

Pricing/Cheese

Product type	Cheese								
Measurement unit	Kilogrammes								

Minimum price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	8.02	2.21	0.00	0.00	12.21	15.02	7.93	18.94	0.00
Small store	6.68	0.74	14.82	0.00	10.20	0.00	0.00	0.00	0.00
Kiosk/tabletop	8.02	0.59	0.00	0.00	0.00	0.00	9.91	0.00	0.00

Maximum of price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	8.02	61.80	0.00	0.00	62.84	18.66	17.89	18.94	0.00
Small store	6.68	0.92	14.82	0.00	14.75	0.00	0.00	0.00	0.00
Kiosk/tabletop	8.02	0.74	0.00	0.00	0.00	0.00	9.91	0.00	0.00

Sample size, n=45

Pricing/Cream

Product type	Cream
Measurement unit	Litres

Minimum price in USD/unit	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.00	2.39	0.00	0.00	5.25	0.00	0.00	0.00	0.00
Small store	0.00	0.00	0.00	0.00	6.04	4.08	0.00	0.00	0.00
Kiosk/tabletop	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Maximum of price in USD/unit	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.00	2.39	0.00	0.00	29.51	10.09	0.00	0.00	0.00
Small store	0.00	0.00	0.00	0.00	6.04	7.90	0.00	0.00	0.00
Kiosk/tabletop	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Sample size, n=23

Pricing/Ice cream

Product type	Ice cream
Measurement unit	Litres

Minimum price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.00	0.00	2.28	0.00	0.00	3.06	0.00	3.00	1.14
Small store	2.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Kiosk/tabletop	0.00	7.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Maximum of price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.00	0.00	50.78	0.00	0.00	4.63	0.00	7.89	2.28
Small store	2.67	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Kiosk/tabletop	0.00	8.28	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Sample size, n=36

Pricing/Milk Powder

Product type	Milk powder
Measurement unit	Kilogrammes

Minimum price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	16.70	0.00	9.12	0.00	21.68	7.56	14.86	6.84	0.00
Small store	15.86	15.86	6.02	0.00	4.26	5.79	16.52	6.31	0.00
Kiosk/tabletop	0.45	0.00	3.45	0.00	3.77	6.44	16.52	6.31	0.00

Maximum of price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	30.06	0.00	14.02	0.00	23.36	17.98	20.64	47.35	0.00
Small store	15.86	15.86	15.88	0.00	18.03	25.74	18.58	28.41	0.00
Kiosk/tabletop	30.89	0.00	15.88	0.00	16.39	19.31	28.90	28.41	0.00

Sample size, n=299

Pricing/Processed milk (flavored)

Product type	Processed milk (flavored)								
Measurement unit	Litres								

Minimum price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.45	0.00	0.26	0.00	3.26	0.00	0.55	3.79	0.00
Small store	0.42	0.00	2.12	2.09	0.00	1.29	1.32	0.00	0.00
Kiosk/tabletop	0.31	0.00	0.00	0.00	0.00	1.24	0.77	0.00	2.28

Maximum of price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	2.67	0.00	5.92	0.00	6.03	0.00	1.82	5.37	0.00
Small store	2.54	0.00	5.43	2.09	0.00	1.61	1.65	0.00	0.00
Kiosk/tabletop	2.74	0.00	0.00	0.00	0.00	1.61	2.31	0.00	2.29

Sample size, n=95

Pricing/Processed milk (unflavored)

Product type	Processed milk (unflavored)								
Measurement unit	Litres								

Minimum price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.67	0.77	2.22	0.00	1.80	3.79	0.00	1.52	0.76
Small store	0.00	0.88	2.28	0.74	1.97	2.65	1.65	1.01	0.68
Kiosk/tabletop	0.00	0.88	3.74	0.81	0.00	3.79	1.65	0.00	0.76

Maximum of price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.67	2.61	2.91	0.00	7.33	5.30	0.00	3.47	1.52
Small store	0.00	0.99	4.67	1.86	3.45	5.30	1.65	1.89	0.76
Kiosk/tabletop	0.00	20.69	4.67	8.13	2.30	5.30	5.51	1.77	2.28

Sample size, n=212

Pricing/Evaporated milk

Product type	Evaporated milk								
Measurement unit	Kilogrammes								

Minimum price in USD/unit	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.00	0.00	0.00	0.00	0.00	3.79	0.00	0.00	0.00
Small store	0.00	0.00	3.11	0.00	0.00	2.65	0.00	0.00	0.00
Kiosk/tabletop	0.00	0.00	3.74	0.00	0.00	3.79	0.00	0.00	0.00

Maximum of Price in USD/unit	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.00	0.00	0.00	0.00	0.00	5.30	0.00	0.00	0.00
Small store	0.00	0.00	3.74	0.00	0.00	5.30	0.00	0.00	0.00
Kiosk/tabletop	0.00	0.00	3.74	0.00	0.00	5.30	0.00	0.00	0.00

Sample size, n=38

Pricing/Raw milk

Product type	Raw milk
Measurement unit	Litres

Minimum price in USD/unit										
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda	
Supermarket	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Small store	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Kiosk/Tabletop	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.38

Maximum of Price in USD/unit										
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda	
Supermarket	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Small store	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Kiosk/Tabletop	0.09	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.38

Sample size, n=6

Pricing/Sour milk (mala)

Product type	Sour milk (mala)
Measurement unit	Litres

Minimum price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Small store	2.67	0.00	0.00	1.16	0.00	0.00	0.00	0.00	0.00
Kiosk/tabletop	6.68	0.00	0.00	1.28	0.00	0.00	0.00	0.00	0.00

Maximum of price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Small store	2.67	0.00	0.00	1.39	0.00	0.00	0.00	0.00	0.00
Kiosk/tabletop	6.68	0.00	0.00	1.28	0.00	0.00	0.00	0.00	0.00

Sample size, n=7

Pricing/Yoghurt (flavored)

Product type	Yoghurt (flavored)								
Measurement unit	Litres								

Minimum price in USD/unit	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	3.12	3.31	0.00	0.00	5.62	2.96	2.64	3.37	1.14
Small store	6.35	3.09	0.00	1.74	2.95	1.93	1.98	0.00	1.14
Kiosk/tabletop	2.08	3.68	0.00	0.00	3.28	0.00	1.32	0.00	1.14

Maximum of price in USD/unit	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	6.68	6.40	0.00	0.00	37.16	3.13	2.64	6.73	1.14
Small store	6.35	3.09	0.00	2.32	4.59	4.83	1.98	0.00	1.90
Kiosk/tabletop	7.01	3.68	0.00	0.00	3.28	0.00	2.64	0.00	1.14

Sample size, n=93

Pricing/Yoghurt (unflavored)

Product type	Yoghurt (unflavored)
Measurement unit	Litres

Minimum price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.00	1.60	0.00	0.00	3.26	2.32	0.00	1.52	0.00
Small store	0.00	1.77	0.00	0.00	2.62	1.29	1.65	1.01	0.00
Kiosk/tabletop	0.00	1.32	0.00	2.09	0.00	1.84	1.65	1.01	0.00

Maximum of price in USD/unit									
	Burundi	Ethiopia	Ghana	Kenya	Mozambique	Nigeria	Rwanda	Tanzania	Uganda
Supermarket	0.00	3.31	0.00	0.00	4.92	2.57	0.00	2.27	0.00
Small store	0.00	2.21	0.00	0.00	3.93	1.84	2.64	1.01	0.00
Kiosk/tabletop	0.00	1.66	0.00	2.09	0.00	1.84	1.65	1.26	0.00

Sample size, n=45

