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Report Name: Senegal's Food and Beverage Marketing Landscape

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Report Highlights:

This market study examines consumer perceptions and receptivity towards purchasing U.S. foods and how those products may be successfully marketed in Senegal. The following report summarizes findings and contains online and offline marketing recommendations for specific categories, including beef and beef products, poultry and poultry products, condiments, sauces, jams & jellies, processed or prepared dairy products, beverages, and snack foods. Opportunities exist for U.S. suppliers who can provide inputs and ingredients to feed millers and food manufacturers, while specialized retailers and distributors are gradually expanding their selection of U.S. consumer-oriented products.

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SECTION I: General Overview & Trends in Consumer Behavior and Preferences

In order to develop a sustainable marketing and promotion strategy, the following report summarizes a market study to gauge consumer perceptions and receptivity towards purchasing U.S. foods. The study also provided recommendations for U.S. industry to effectively market products in Senegal. This report includes a summary of deliverables from the study, including key trends across targeted categories, information on supply chains and distribution, and general recommendations for marketing food and beverages in Senegal.

Senegal imports around 70 percent of its food, feed, and beverages. Despite total imports reaching \$2.8 billion in 2022, the U.S. market share is about \$10 million annually, or less than one percent.

Competitors from the EU, South Asia, South America, and China are present—on retail shelves and in person, while the U.S. industry is largely absent from the market.

Senegalese consumers view imported products as high-quality, but the average consumer has very limited financial resources. Nevertheless, there is a growing middle- and upper class that can afford to purchase imported products.

There is opportunity for slow-yet-incremental growth in U.S. consumer-oriented goods (condiments, beverages, snack foods, and frozen foods) as the niche retailers who cater to expatriates and the growing middle- to upper-class consumer base are scaling up. They recognize that many consumers seek American branded goods and associate them with quality and safety. These retailers report strong sales of snacks and beverages. They generally import mixed whole or partial containers, as opposed to working directly with suppliers, though this could evolve as their footprint expands. Price competitive consumer-oriented goods or processed poultry products may have an opportunity in the traditional or non-formal retail space, which consist of approximately 35,000 small “boutique” stores that have limited storage but quickly turn over their stock. These boutiques cater to the mass market and are supplied by several competing wholesalers. The proportion of Senegalese consumers who shop in supermarkets such as Auchan, Casino, Carrefour, and Hypermarche Exclusive is small but growing. These supermarkets import many well-known U.S. brands, but almost exclusively from Europe where production outside of the United States is licensed.

In Senegal, rice, millet, sorghum, and maize constitute the staple food of households. Peanuts are both an important source of protein and commonly a cash crop. Consumption of fruits and vegetables is generally low, especially in rural areas. Fish is traditionally the most common animal protein source. However, fish prices are rising as demand increases and exports command premiums. Consumption of other meats has grown tremendously in recent years, and with it a rise in the number of restaurants, fast-food businesses, and roasted meat shops called “Dibiterie” in urban centers. Senegal’s poultry sector is growing, providing opportunities for investment in local agricultural production.

Other opportunities exist for ingredient and input suppliers to sell to local food manufacturers of beef and beef products, processed or prepared dairy products, beverages, and snack foods. This agri-food

industrial sector in Senegal produces a wide range of products and is import dependent for most inputs and ingredients.

With these trends, there is long-term market potential for food ingredient and feed suppliers as well as consumer-oriented foods for specialized retailers and distributors. Post contacts in the food retail sector show interest in fast moving U.S. consumer goods including snack foods, choice-graded U.S. meats, canned pulses, condiments and sauces, dairy, and beverages as part of their expansion. Although the overall U.S. exports to Senegal are relatively small, within the past two years U.S. exports of soybeans, distillers' dried grains with solubles (DDGS), food preparations, and condiments and sauces have hit record highs.

SECTION II: General Overview and Trends in Consumer Behavior and Preferences

Beef and Beef Products

According to Senegal's National Agency of Statistics and Demography (ANSD) per capita meat consumption in Senegal was 40.8 lbs in 2021, with beef making up 11.8 lbs of the total. In 2021, the Trade Data Monitor (TDM) reported that Senegal imported 16.3 MT of beef and beef products dominated by buffalo meat (61 percent) supplied primarily by India and offal (35 percent) imported mainly from the EU. Premium beef cuts are coming in small volumes, mostly from Brazil, Argentina, Australia, and France.

Figure 1: Poultrade Advertisement for Daara Branded Product



Source: <https://www.facebook.com/poultradesenegal/>

Almost all the beef sold in supermarkets is from local origin. Most supermarkets are supplied by the Slaughterhouse Management Company in Senegal (SOGAS, ex-SERAS) with meat that is inspected and certified by a veterinarian. A survey of supermarket consumers showed the monthly spending median on beef was \$23.95 (predominantly shopping for households). Data collected in February 2023 showed steak cuts selling between \$5.00-\$5.90/lb across the common supermarket chains. For comparison, the

U.S. Bureau of Labor Statistics shows the average U.S. retail price for USDA choice steak (round) was just over \$7/lb during the same period.

Besides the consumption of fresh meat, there is also a large consumption of beef products such as salami, sausages, and minced meats, especially during holidays like Ramadan. Most locally produced brands are sold in supermarkets and neighborhood shops.

Poultry and Poultry Products

According to estimations by the *Fondation pour l'agriculture et la ruralité dans le monde* (FARM), the consumption of broilers in Senegal, including backyard chickens category, has practically doubled over the past ten years, going from 7.9 lbs per person in 2010 to 15.4 lbs in 2019. Only processed poultry products are eligible to be imported, so any raw chicken must be domestically produced. In 2022, according to the Food and Agriculture Organization (FAO) of the United Nations (UN) statistics database, 96.9 million chickens were slaughtered. Consumption of other poultry like ducks, turkey, pigeons, etc. is marginal.

With an average price per subject amounting to around \$4.10, the value of the broiler market was at just under \$400 million dollars. However, the study showed the price of a Senegalese whole broilers in supermarkets varied between \$6.67 and \$10.00, more than the price of a small-sized (2.5 lb) U.S. whole broiler at nearly \$4.60 in December 2022. The price of domestic chicken has risen in recent years, but that the broiler's consumption rate has not been negatively impacted. In Senegal, holidays and celebrations call for large feasts which often lead to spikes in poultry consumption and prices, especially around Eid (Korité, Tabaski etc.), Magal de Touba, and the New Year. The high fluctuation in demand creates challenges for producers who have a ceiling on how much they can regularly produce given the competitive market. Even with some producers only operating in the lead up to holidays, the Senegalese poultry market experiences notable shortages during these times of peak demand. This along with quality concerns for eggs and poultry has pushed some retailers and supermarkets to explore starting up their own poultry farms.

Heat treated or processed poultry products are permitted to enter Senegal. Retailers that specialize in U.S.-products reported a high demand for pre-cooked or ready-made poultry products, such as wings and drumsticks. There may be opportunity for wholesalers and distributors to find buyers for canned poultry products among the many competitively priced boutique retailers prevalent in Dakar.

Condiments, Sauces, Jams, and Jellies

Condiments are an essential part of Senegalese cooking and are widely used in traditional dishes such as Thieboudienne (rice and fish) and Yassa (chicken or fish marinated in lemon juice and onion). The market is also very competitive, with many products imported from China, India, France, and Turkey. The Senegalese government has put in place various measures to foster the development of the condiment sector in the country. These include providing subsidies to small producers and supporting initiatives to improve the quality and safety of local products.

Two items in this category that are most consumed are bouillon cubes/powder and tomato products. Their popularity is owed in part to several attributes that appeal to Senegalese consumers: shelf stability, lower price points, single-sized servings, taste preferences, etc. Bouillon cubes are sold for around ten cents each which makes them widely accessible. The cubes are manufactured locally and regionally and come in several varieties to cover national and regional tastes (Figure 2). Per capita consumption in Senegal averages nearly five cubes per day. Bouillon is made with salt, maltodextrin, flavor enhancers (glutamate, guanylate, inosinate, or yeast extract), oil, and other flavorings, then dehydrated and formed into small cubes or powder. Some bouillon may contain meat or vegetable extracts, as well as sugar.

Figure 2: Patisen's ADJA Bouillon Powder Cube Advertisement



Source: <https://www.youtube.com/watch?v=GSrO6ZKA-oY>

Double tomato concentrate is a necessity in Senegalese cooking, with an unregulated price. Over 60,000 MT of double tomato concentrated is produced in Senegal, annually. Often, this is made from triple tomato concentrate which is generally imported mainly from China. Obtained from tomato paste, ketchup is another sauce widely consumed in Senegal. Several food manufacturers produce it.

Mustard and mayonnaise are produced locally from imported powdered ingredients, mustard powder and egg yolk powder. Mayonnaise is commonly consumed and with the large volumes produced to keep up with local demand, several manufacturers have also turned to export regionally.

Jams and jellies are mostly imported by traders to supply restaurants, hotels, shops. Jelly is also imported by supermarkets. The main local producers of jellies are present in small quantities in local retail and supermarkets, though some of the more premium products are beginning to find international buyers from the United States, Canada, Europe, and Gulf countries.

There is an increasing demand for soy sauce, which is imported from China, though there is now some marginal local production.

2023 was a record year for exports of U.S. condiments and sauces to Senegal, at \$2.1 million, which may be due to the increasing bandwidth of niche retailers.

Processed or Prepared Dairy Products

Across West Africa, there is a high volume of milk powder imports. According to the Ministry of Livestock and Animal Production (now part of the Ministry of Agriculture, Food Sovereignty, and Livestock), Senegal imports around half of its dairy consumption, mainly in the form of milk powder which is consumed in the home or reconstituted and processed into various dairy products. Dairy products are available in several categories namely, milk (powder, curd, and liquid), yoghurt, cheese, butter, cream etc.

The consumption of milk and its derivatives has shown strong growth, up 47 percent per capita between 2017-2021, from 29.8 liters to 42.1 liters. This is partly explained by the accessibility of milk prices for a growing middle class, a changing nutritional diet, but also by the miniaturization of packaging that adapts to the day-to-day shopping culture of most Senegalese.

In recent years, there has also been an increase in milk production, up 15.2 percent between 2017-2021, from 243.5 million liters to nearly 280.6 million liters. Two factors that have contributed to growth are genetic improvements of local breeds in extensive dairy farming (which uses small inputs of labor, fertilizer, and capital relative to the land area), and the conversion of extensive farms into semi-intensive or intensive farms that are more industrialized. In addition, disease control in all production systems has also contributed to local milk production increases.

Aside from milk powder, some branded liquid milk is imported, often sweetened and unsweetened, condensed milk, cream, yogurt, and sterilized ultra-high temperature (UHT) products. The remaining dairy imports include butter, margarine, and cheeses. In 2022, the top suppliers were the EU (67 percent) and New Zealand (10 percent).

Beverages

The beverage market in Senegal is dynamic and highly competitive due to the rise of local producers, the significant presence of international brands, and beverages' significant role in local culture. Foreign brands are entering the market through licensed production of their beverages by local manufacturers. In addition to industrial production, Senegalese also consume handcraft juice, like bissap (hibiscus), ginger, and fruit juices. The consumption, production, and importation of alcoholic beverages in Senegal are heavily influenced by the country's sociocultural context, which is predominantly Muslim.

The patterns of beverage consumption exhibit considerable variation across the different categories within households. According to the report, the segments that command the highest consumption are soft drinks, with an average monthly intake of 13.87 liters, followed by juices at 7.2 liters, and energy drinks trailing at 1.45 liters. The beverage industry is dominated by major producers such as SIAGRO

Kirène (official bottler of PepsiCo and Prèsséa), IBS (official bottler of Coca-Cola), SOBOA, LSB, and Fary Industries. Nearly all inputs required by the industry (concentrates, colorings, flavorings, syrups, and preservatives) are imported and not produced domestically.

Snack Foods

In the snack sector, a clear dichotomy exists between street vendors' snacks and the modern offerings of global brands. Indeed, traditional snacks (nuts, fritters, pastries, fruit snacks) are integral to Senegalese culinary culture. Yet, supermarkets are filled with international and locally manufactured brands, for which demand is growing. This snack diversity reflects Senegal's evolving tastes, balancing traditional and modern options due to globalization.

Traditional artisanal-crafted snacks are widely available on the streets and in local markets throughout the country. Beyond mere consumption for pleasure, certain snacks are deeply ingrained in the customs and rituals of ceremonies in Senegal. For instance, at weddings and baptisms, sweet coconut-dusted fritters are always served. During baptisms, lakh is also a customary offering, and during funerals, Nakka (a millet-based ball) is also served. During religious festivals, the ngalakh, a snack made from millet, peanut paste, and baobab fruit, is consumed at Easter and symbolizes the communal harmony between Christians and Muslims.

Internationally recognized brands, such as Pringles, are widely available and imported almost exclusively from Europe. There is no licensing or production of major international brands in Senegal. However, there are several major local producers in the snack sector. Companies like Africa Chips, Dimbaya, Bisko, and Confisen are gaining recognition for their products. Africa Chips and Dimbaya each produce between 20,000-30,000 packages daily. Both brands are also expanding into neighboring markets such as Guinea-Bissau, Gambia, or Mali.

The qualitative study conducted shows that semolina-based chips require imported semolina from India, Brazil, and Europe due to its production process. As for potato-based chips, the local climate yields starch-rich potatoes that darken when fried, affecting chips' color and necessitating imports, much of which comes from Morocco. For biscuits, most of the flavorings are imported. Like beverages, most of the inputs for non-traditional snack production are imported and not locally produced.

While there is often consumption of local grains at breakfast, such as millet, bread remains the preferred choice for the majority of Senegalese. Bread is also eaten as a snack or to accompany other meals. Chocolate spread or tuna bread is a breakfast staple that can be found in all neighborhood boutiques. The chocolate spreads produced in Senegal are mostly based of peanuts enriched with cocoa and sugar. Patisen, the local leading agro-food company, produces four brands of spreads: Chocolion, ChocoPain, Noisellia, and Kangoo.

Figure 3: Boutique shopkeeper serving bread with chocolate spread



Source: OAA Dakar Market Study

SECTION III: Supply Chains and Distribution Channels

Almost all goods entering Senegal transit through the Port of Dakar (around 90 percent) and the rest by truck via land routes from Morocco and neighboring countries. Goods are then distributed to interior areas and the neighboring markets, such as the landlocked country of Mali. According to International Trade Administration, Dakar contains the largest consumer market with 90 percent of its manufacturing base and nearly 3.4 million inhabitants (about 20 percent of the country's population).

Higher-value perishable imports are brought in by a small number of distributors who supply restaurants or operate specialty shops or that cater to upper-class Senegalese and expats. Many of their products arrive on air freight from the EU, while other shelf stable products are shipped in containers. Large supermarket or other retail chains also self-import product that goes directly to their shelves. Food processors bring in a large volume of imported inputs, mainly containerized dry goods—like milk powder or other food preparations—from the EU.

For dairy importers, the main customers are processors, wholesalers, supermarkets hotels, and restaurants. Most wholesalers of dairy and other food and commercial products (rice, oil, detergents, etc.) have warehouses in the center of Dakar, and supply the city, its suburbs, and other regions of the country by truck. Wholesalers often sell to semi-wholesalers established in Dakar markets and regionally, or directly to retailers and processors.

Most Senegalese are price sensitive consumers and purchase food from large informal markets and small boutiques, of which there are up to 15,000 individually owned locations in Dakar alone with another 20,000 elsewhere in Senegal. These locations tend to be supplied in piecemeal by local producers and

many importers, wholesalers, and distributors of various size and specialty. For the less formal distribution channels, there is typically no cold chain. To differentiate themselves in the competitive market, wholesalers seek to establish brand exclusivity or independent labels.

SECTION IV: Marketing Food Products in Senegal

Consumers tend to make purchasing decisions based on one or many of the following factors: price, product nutrition or composition, package size, or on an aspirational basis, the latter of which can be an advantage for U.S. brands to counter the lack of familiarity.

Traditional media platforms still are the most common way food and beverages are advertised. Point-of-sale (POS) promotions are also frequently used across the retail spectrum. Cost-efficient mass communication methods that have been recently adopted elsewhere—utilizing social media influencers—are not as effective for advertising product in Senegal. However, locally produced television series intended for initial or re-broadcasting on YouTube may offer opportunity for low-cost product placement.

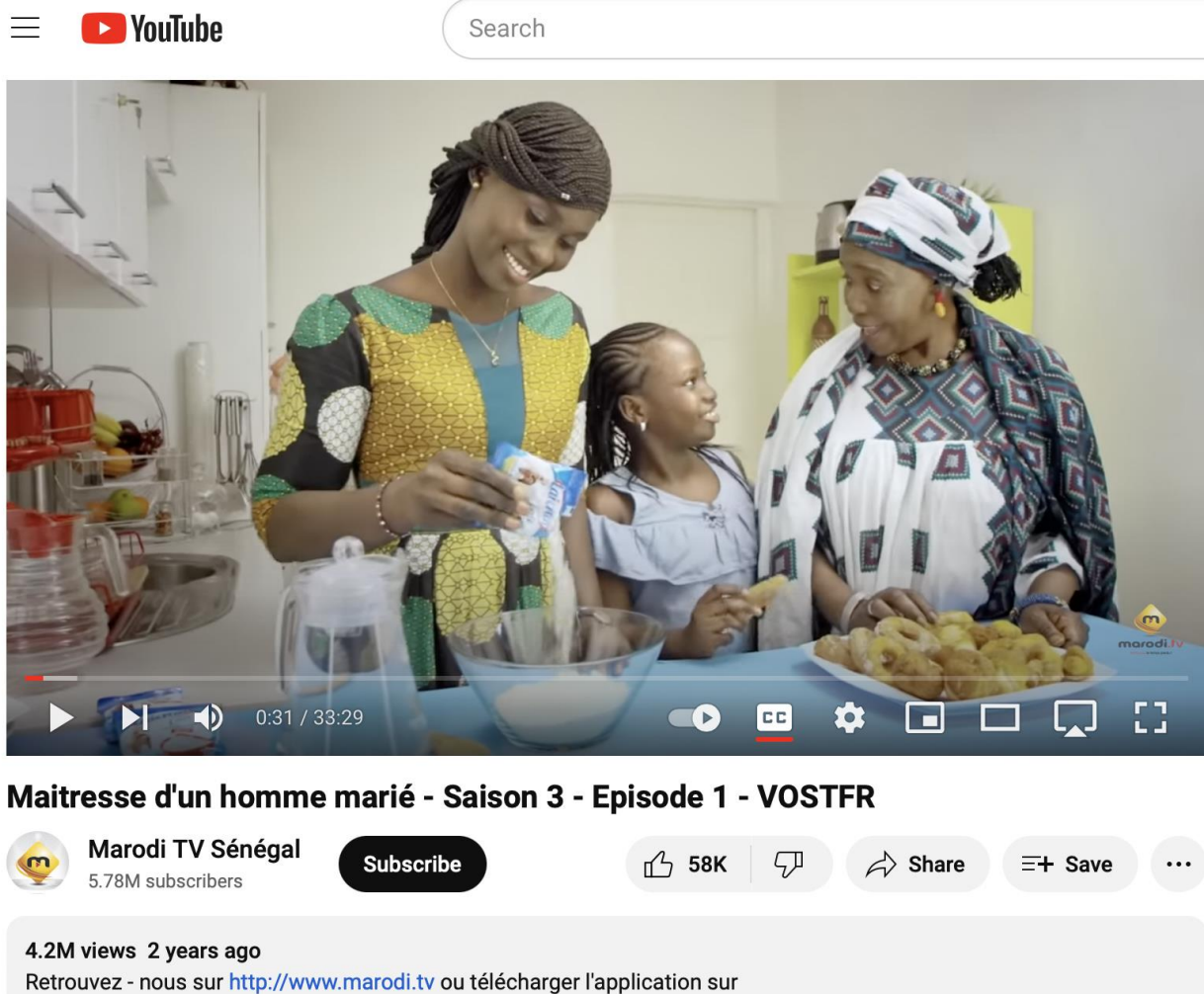
Survey results showed that 95 percent of Senegalese consumers regard U.S. products as high-quality as opposed to just 56 percent for non-U.S. products, but U.S. brand recognition and awareness is lacking. Outside of globally recognized brands like Coca-Cola or Pepsi, U.S. food and beverage promotions are essentially non-existent, so promotional campaigns to build recognition are vital to adoption. Key things to consider when preparing to market in Senegal are package size and labeling. Many consumers shop daily and buy smaller quantities. Also, French and Wolof are the most spoken languages, and most consumers will not be able to read English packaging and labels.

Mass Media

Since 2011, companies have been using television series to advertise their products and this phenomenon has quickly grown with the advent of web-series. Dairy products, condiments and sauces, and beverages commonly appear in product placements. Production houses like Marodi, EvenProd, Invictus TV, Patisen TV, and Leuz TV broadcast on popular local television channels (such as 2sTV, TFM) international channels (such as Canal+) or even public television (RTS). However, the series have amassed billions of cumulative views in Senegal, regionally, and among the overseas diasporas through their release on YouTube, which is the main distribution channel for the studios. Series such as "Maîtresse d'un Homme Marié" (see Figure 3) are inspired by the West African middle-class lifestyle and include product placement advertising for a fee. This style of advertising has become so commonplace and effective to communicate with the populace and build brand awareness—these series often bring in millions of online views per episode—that local food manufacturers have created entire series to help advertise their products. For example, Patisen created a popular series called "ADJA Ramadan" which only presents its branded products. Advertisements on condiments appear in all five of the most followed series in Senegal. The placement usually last between five seconds to three minutes.

TV, radio, and print advertisements (in local publications that are often available outside of supermarkets) are also common and relatively effective at building awareness and promoting products. Advertisements of beef and poultry products usually coinciding with major holidays.

Figure 4: Example of Milk Powder Product Placement in YouTube Web-Series



Maitresse d'un homme marié - Saison 3 - Episode 1 - VOSTFR

Marodi TV Sénégal
5.78M subscribers

Subscribe

58K

Share

Save

4.2M views 2 years ago

Retrouvez - nous sur <http://www.marodi.tv> ou télécharger l'application sur

Source: <https://www.youtube.com/watch?v=51d5BXqBisY>

Online

Other mass social media campaigns are somewhat limited and only a handful of influencers have been identified. While mobile phone use is practically ubiquitous, only 46 percent of Senegalese had internet access in 2022, according to DataReportal. Facebook is by far the most used social media platform, though TikTok and Instagram have also gained popularity. Since website develop requires skilled staff and resources, many businesses in Senegal use Facebook as their primary online website. WhatsApp is extensively used as a communication application among those using smart phones.

Offline

POS advertising is a noticeable and common practice. For example, the main poultry producers use their large distribution networks to disseminate promotional information to vendors and often use it for subsidiary processed products and eggs. For U.S. suppliers, this could be potentially facilitated through partnerships with distributors. Retailers that specialize in U.S. products would also be ideal partners for in-store promotional campaigns. Street billboards are common around high-traffic and markets and are effective for promoting beef, poultry, condiments and sauces, or dairy products. Local beverage manufacturers often feature local celebrities or professional athletes and use local languages in their billboards advertising. Snack food manufacturers tend to use more traditional media advertising as opposed to online communications.

Figure 5: Vital Margarine Billboard in Dakar



Source: <http://impendingboom.com/2015/09/09/billboards-in-dakar/>

SECTION IV: Additional Information

Study Methodology and Operational Approach

The study included a literature review of publications and data from the Government of Senegal (GoS), Food and Agricultural Organization (FAO), and many other organizations and research publications. This review was followed by surveys of 1,620 Senegalese consumers in target market areas (spanning six cities) over the course of one month for the first five categories, followed by a second survey of 770 consumers for the snacks and beverages summaries. The surveys collected information on product and brand preferences, consumer budgets, and purchasing habits, and provided demographic insights directly from consumers. The study also collected data from market actors including producers, distributors, importers, and traditional media representatives.

Contact Information and Links

For further inquiries, please contact AgDakar@usda.gov.

Other reports published by FAS Dakar, including on Food and Agricultural Regulations and Standards and the Exporters' Guide can be found on the following [webpage](#).

Attachments:

No Attachments.