CONSUMER STUDY IN TANZANIA

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INRAE

IIABA
IIABA Innovations Institutionelles pour l'Agriculture Biologique en Afrique

TOAM
Tanzania Organic Agriculture Movement

1) Aims and scope

Provide expertise results and recommendations on:

- the consumption of organic products (OP) in Tanzania
- the Tanzanian organic market itself
- the opportunities and obstacles to its development

Reviewing the grey and scientific literature

Developed a protocol

Conduct the qualitative and quantitative surveys in 4 regions

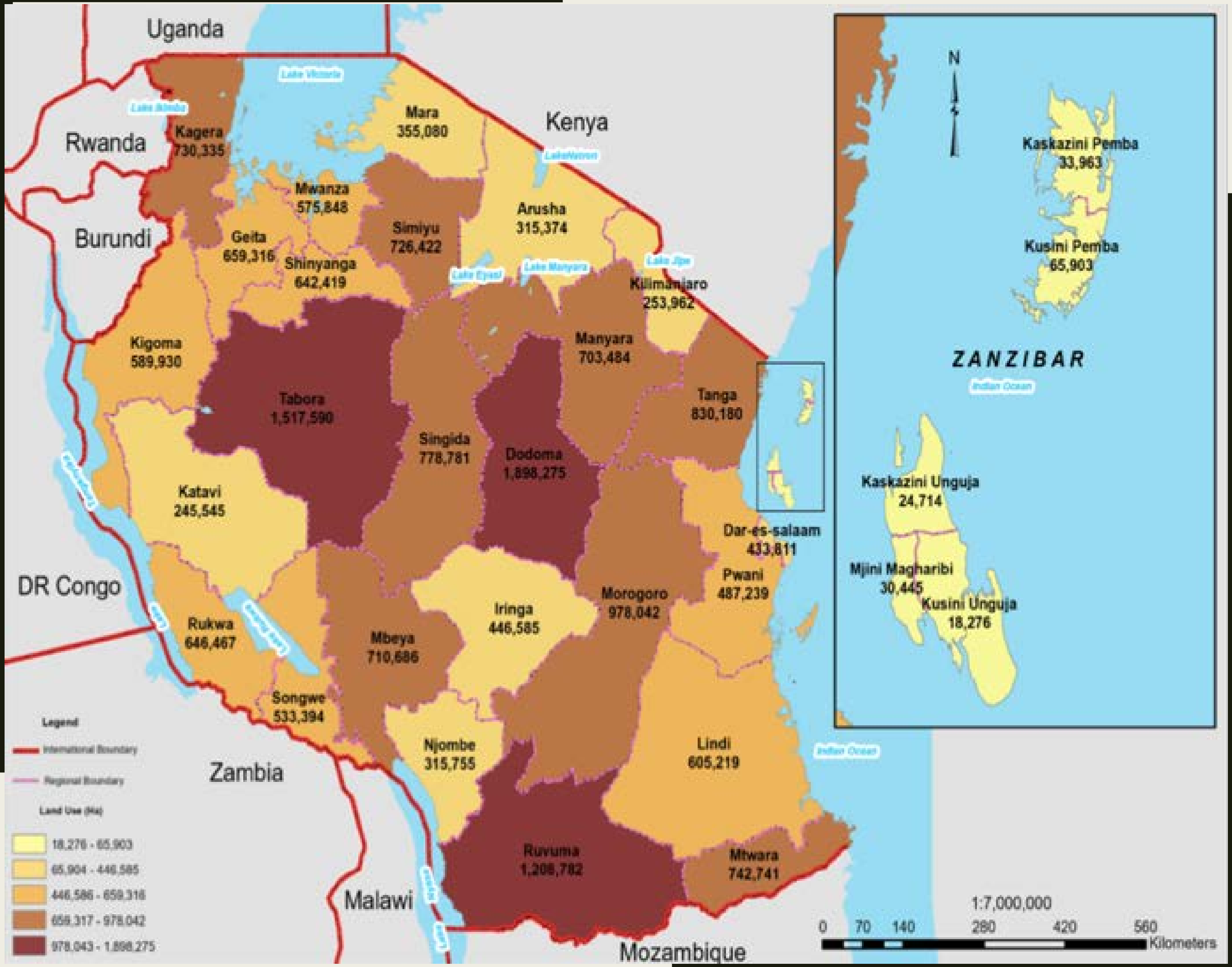
- *Dar es Salam*
- *Morogoro*
- *Dodoma*
- *Zanzibar*

2) Methodology

- Pre-survey: map the study areas
- Non-participatory observations in different places of purchase
- Interviews with farmers, store managers, vendors, consumers and TOAM members
- Consumer questionnaire to study 4 criteria that may influence the consumption of OP
  - *The consumer's profile*
  - *Knowledge of OA*
  - *Food behavior*
  - *The perception of OP*

Statistic analysis on RStudio

WHAT ARE THE CHARACTERISTICS, OBSTACLES, AND OPPORTUNITIES FOR THE DEVELOPMENT OF OP CONSUMPTION IN TANZANIA?



Map 1: Land used for agricultural activities by region
National Sample Census of Agriculture *2019/2020*

4) THE REGIONS STUDIED

DAR-ES-SALAM	MOROGORO	ZANZIBAR
	Consumer's profile	
Female: **70%** [26-45]: **59%** Tanzanian: **55%** / Expatriate: **45%** Urban area: **88%** Bachelor/Master/PhD: **79%** Entrepreneur/Business owner/Employee/Executive: **66%** Single / Married (ratio) = **1** More than 2 poeple: **80%** >100,000 TSh: **53%** Not responsible of shopping: **7%** Not responsible of cooking: **10%**	Male: **54%** [18-35]: **82%** Tanzanian: **96%** Urban area: **69%** A'level and lower level: **66%** Student: **54%** Single / Married (ratio) = **2** More than 2 poeple: **90%** <50,000 TSh: **64%** Not responsible of shopping: **17%** Not responsible of cooking: **31%**	Male: **58%** [26-35]: **49%** Tanzanian: 54% / Tourist: **35%** Urban area: **43%** A'level/Bachelor/Master: **77%** Employee: **35%** Single / Married (ratio) = **1,58** More than 2 poeple: **75%** <100,000 TSh: **57%** Not responsible of shopping: **19%** Not responsible of cooking: **24%**
	Knowledge of organic products	
Familiar with organic farming: **78%** Number of differences chosen at more than 50%: **4** Organic certification as a difference: **39%** Good knowledge of organic framing: **15%**	Familiar with organic farming: **75%** Number of differences chosen at more than 50%: **2** Organic certification as a difference: **14%** Good knowledge of organic framing: **1%**	Familiar with organic farming: **59% (46% of Tanzanian residents)** Number of differences chosen at more than 50%: **1** Organic certification as a difference: **21%** Good knowledge of organic framing: **4%**
	Food behavior	
Organic consumers: **83%** Number of organic product types chosen at more than 50%: **4** The organic products purchased are "all" or "not all" certified: **62%** The organic products purchased are not certified at all: **24%** The most chosen markets: **Local market/Organic shop/Supermarket**	Organic consumers: **94%** Number of organic product types chosen at more than 50%: **4** The organic products purchased are "all" or "not all" certified: **54%** The organic products purchased are not certified at all: **43%** The most chosen markets: **Local market/Organic shop/I grow products**	Organic consumers: **62%** Number of organic product types chosen at more than 50%: **3** The organic products purchased are "all" or "not all" certified: **13%** The organic products purchased are not certified at all: **87%** The most chosen markets: **Local market**
	Perception of organic food	
Price opinion "a little bit expensive": **41%** I'm willing to pay more: **63%** Certification encourages me to buy organic products: **47%**	Price opinion "justified" and "very cheap": **65%** I'm willing to pay more: **59%** Certification encourages me to buy organic products: **61%**	Price opinion "justified" and "very cheap": **51%** (No opinion: 27%) I'm willing to pay more: **51%** Certification encourages me to buy organic products: **61%**
	Main reasons why consumers buy organic products: **Health benefits / Environmental and social impact / Taste and freshness / Support for the trader/producer** Main obstacles that may prevent the consumption of organic products: **Low knowledge / Price too high**	

8) Conclusion

Organic market is currently very small in Tanzania

OP remain significantly more expensive than conventional foods in local markets

The consumer sample we analyzed can be characterized in three categories

Most consumers buy products they consider organic in local markets

Awareness of OP among respondents was found to be very low overall

Lack of knowledge = main barrier to OP consumption before the price factor

Tanzanians seem to consider their health as the most important reason for consuming OP

) Recommendations

Develop the organic market by intensifying the certification of farmer groups by PGS

- The model that SAT and TOAM have set up in Morogoro

For demand to follow → raise awareness

- Educational programs
- Agricultural and social initiatives such as PPIZ
- Internet and social networks

Sell OP and disseminate knowledge in local markets

Government and TBS recognition of EAOPS + financial incentives and subsidies

Communication/marketing campaigns → attractively designed packaging with recyclable components

Organic and agroecological network on a national scale

THANK YOU FOR YOUR ATTENTION