

Nigeria

Ikke bare tørre
fakta om tørrfisk

Bodø, 12.05.05

Egil Ove Sundheim





Nigeria

**Afrikas mest folkerike nasjon
med 129 millioner konsumenter**

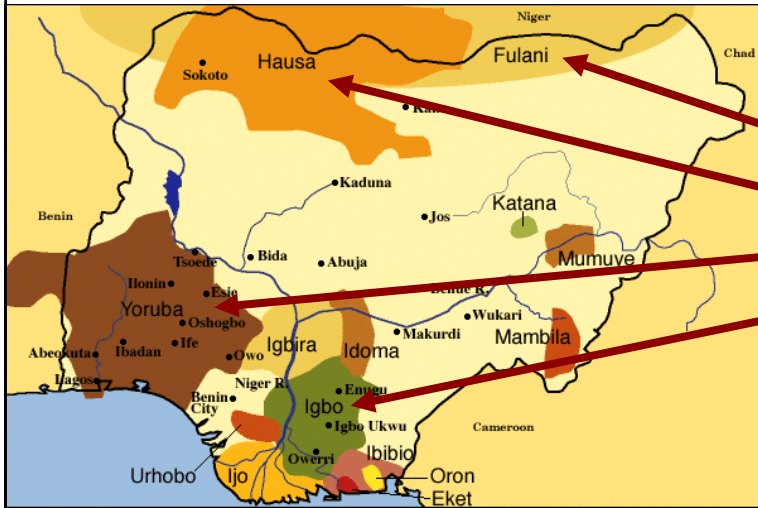
**42% av befolkningen er under
14 år, median alder er 18 år**



**Nigeria:
36 stater +
Abudja**



Mer enn 250 etniske grupper



Fulani

Hausa

Yoruba

Ibo (Igbo)



Religionstilknytning



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Kristen
47 %

Tradisjonell
4 %

Muslim
49 %





Prosjektet

Skrivebordsundersøkelse

Omnibus

Konsumentundersøkelse

**Undersøkelse av
handelsaktører**

Priselastisitet

Sosial/kulturell analyse



The Stockfish Market

*- Understanding the
Nigerian Consumer*

September 2004

Project 'Pacific'

*Usage & Attitude Study
(Omnibus Phase)*

GALLUP
INTERNATIONAL



2/3 kjenner til tørrfisk



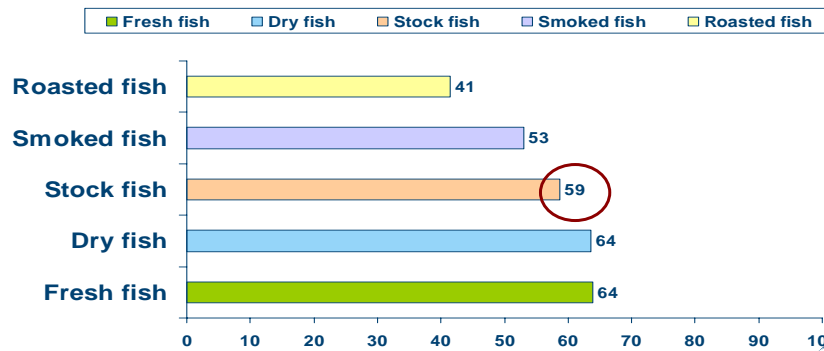
Nigerbus: 59% har smakt tørrfisk

	Un-Weighted		
	Contacts (n)	Stock fish Consumers (n)	Incidence (%)
Lagos	330	288	87.3
West	885	635	71.8
North	2623	936	35.7
East	1207	1105	91.5
Total	5044	2963	58.7



*Incidence is based on ever consumed stockfish

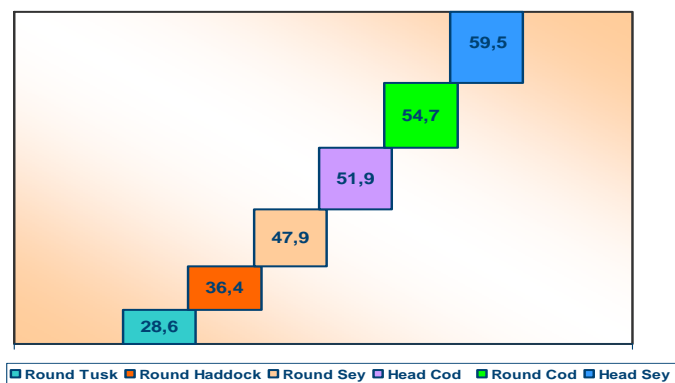
Konsum for ulike sjømatkategorier



Base: 5,044



Hjulpen kjennskap Tørrfiskprodukter



Base: 1,386

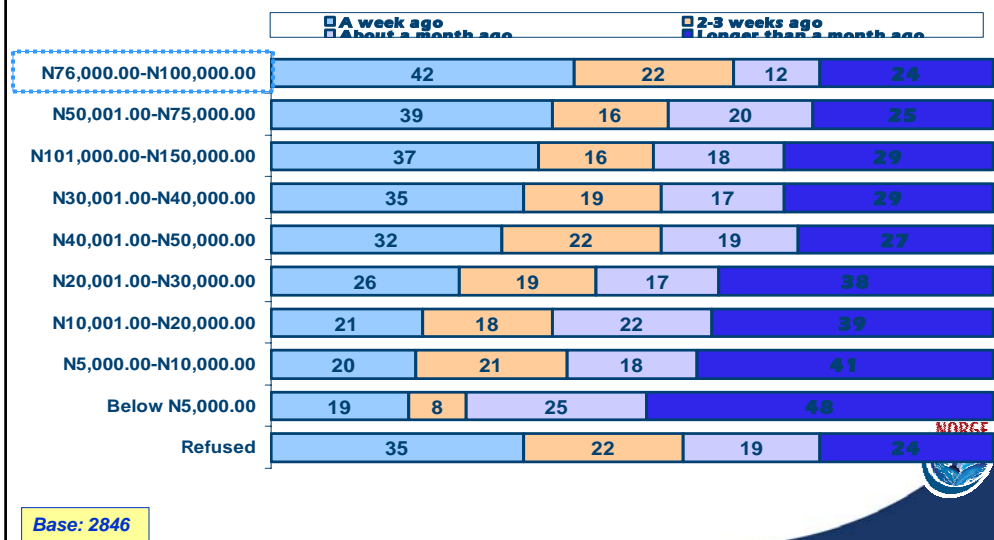




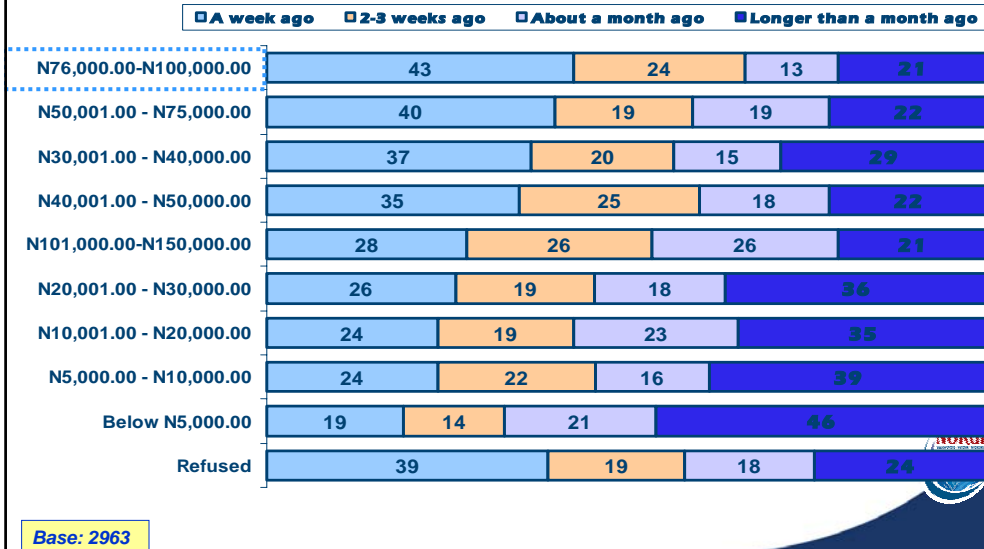
1 Naira =
5 øre



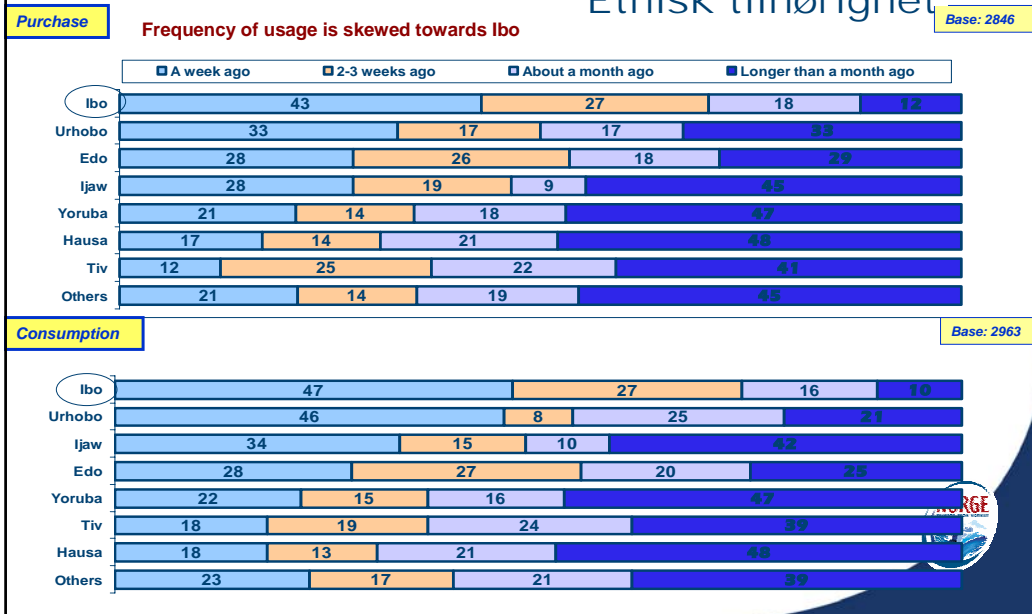
Kjøp av tørrfisk Månedlig husholdningsinntekt

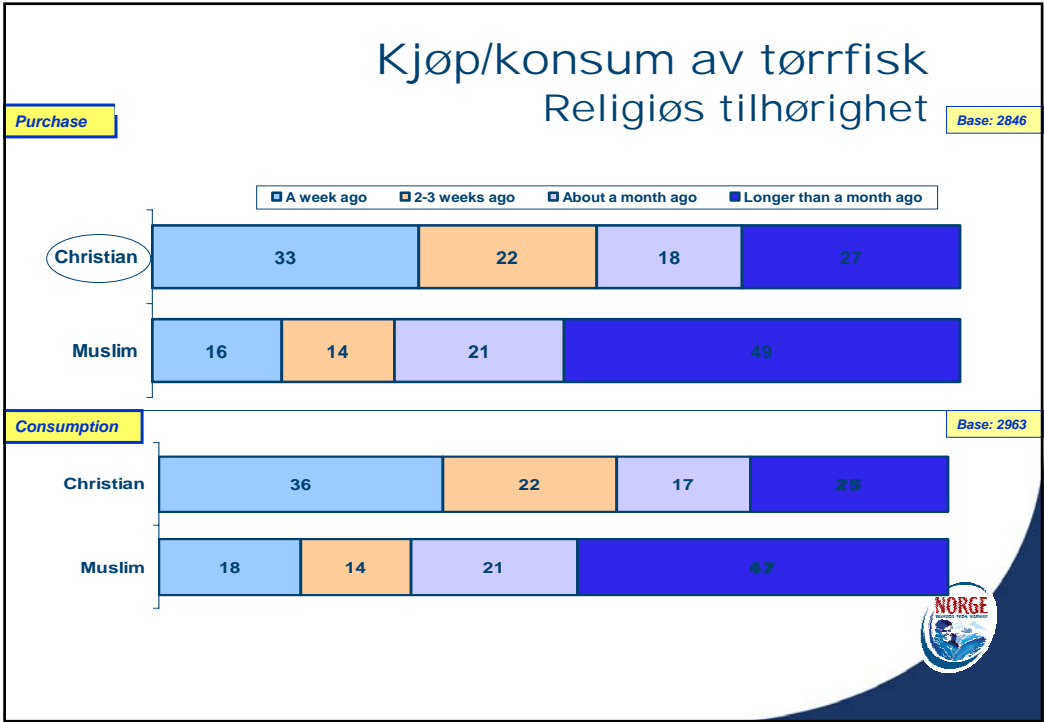


Konsum av tørrfisk Månedlig husholdningsinntekt



Kjøp/konsum av tørrfisk Etnisk tilhørighet





Oppsummering omnibus

2/3 kjenner til tørrfisk – høyere enn forventet

6 av 10 har spist tørrfisk

Størst kjennskap og konsum i sørøst (lbo)

Størst kjennskap og konsum blant kristne

MEN: også konsum i nord og blant muslimer!



*Insights into the Nigerian
stockfish market*

December 2004

Project 'Pacific'
Usage & Attitude Study

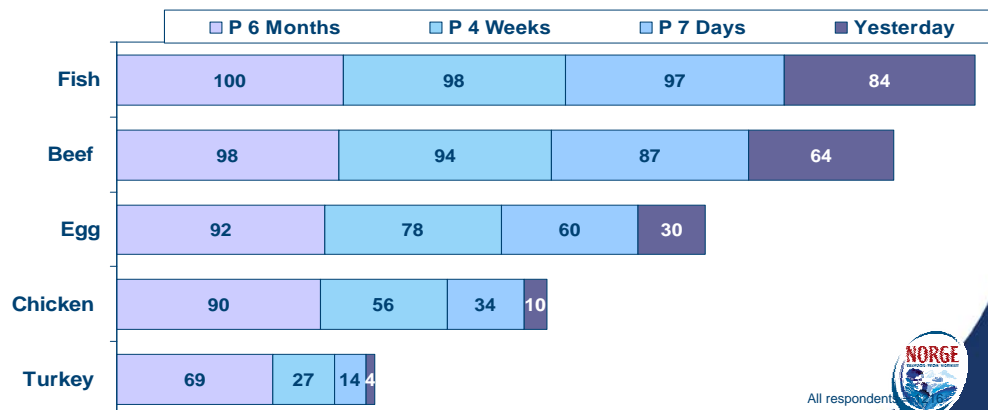


6 byer i 3 områder valgt ut



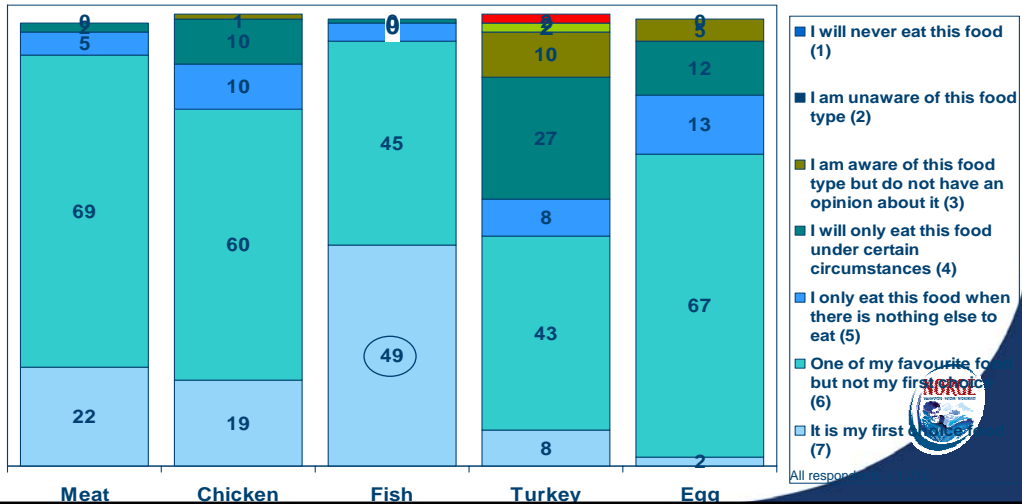
Konsum av proteiner

Which of the following meat types have you consumed in the



Konsumentpreferanse

Which of the following statements would you use to describe



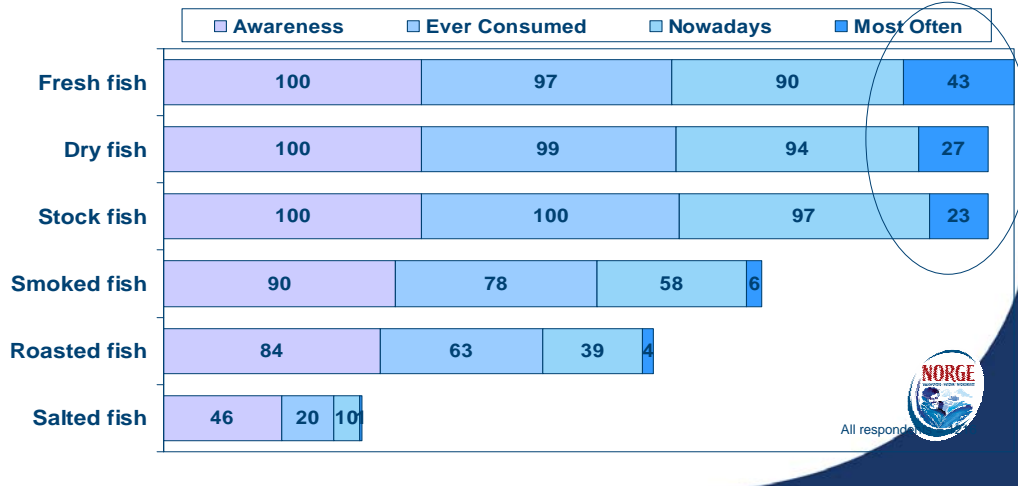
Årsak til førstevalg

Why do you say is your first choice of food?

	Fish	Meat	Chicken	Turkey	Egg
	598	266	225	95	25
	%	%	%	%	%
More protein	32	27	17	10	48
Has a unique taste	31	38	52	31	16
Nourishes the body	22	16	19	10	16
More affordable	22	11	11	1	8
More readily available	6	10	4	1	-
More delicious taste	5	7	13	32	-

Kjennskap og konsum - fisketype

Which of the following types of fish have you.....?



Årsak til førstevalg

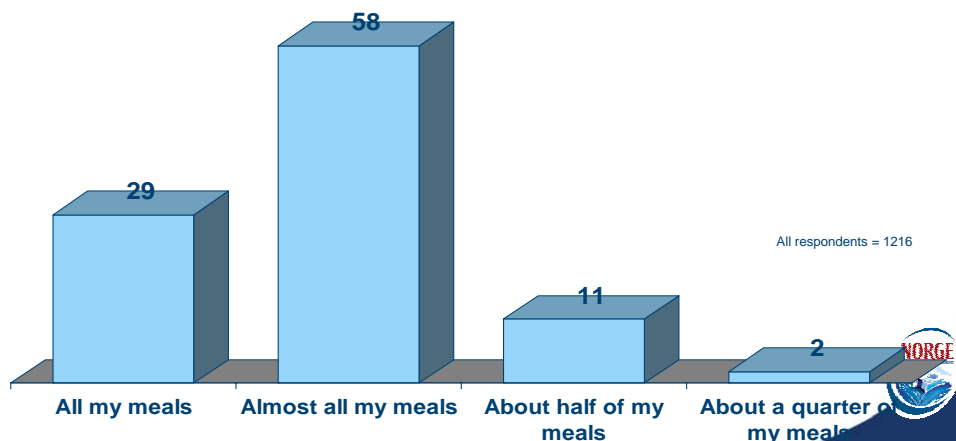
Why do you sayis your first choice of food.?

Perceived unique taste, as well as pleasant aroma (for Stock fish) are the major appeal for Stock and Dry fish. While Fresh fish is preferred mainly for its perceived nutritional value.

	Dry Fish 165	Stock Fish 175	Fresh fish 258
It has a unique taste	57	58	36
It nourishes the body	13	9	27
Contains more protein	5	9	29
Pleasant aroma	16	27	7
More affordable	16	2	14
More delicious	7	17	5
Readily available	10	2	10
Better preservation	15	4	0
Pleasant flavour	7	7	3
Texture	4	5	7
Easier to cook	7	2	5
Makes the body fresh	1	0	9
Contain less/no fat	4	2	5

Bruksfrekvens for fisk

How regularly do you include fish in your meals



Konsumfrekvens

How often do you consume.....?

Fresh fish is more of an every day food, while about ¼ of all consumers use Stock fish at least once a week.

All respondents = 1,216

	Dry	Stock	Roasted	Fresh	Smoked	Salted
Everyday	22	11	5	29	5	11
4-6 times a week	18	15	10	17	11	8
2-3 times a week	31	28	25	22	25	29
Once a week	16	24	26	16	23	20
2-3 times a month	8	13	21	9	21	14
Once a month	3	10	14	7	15	18

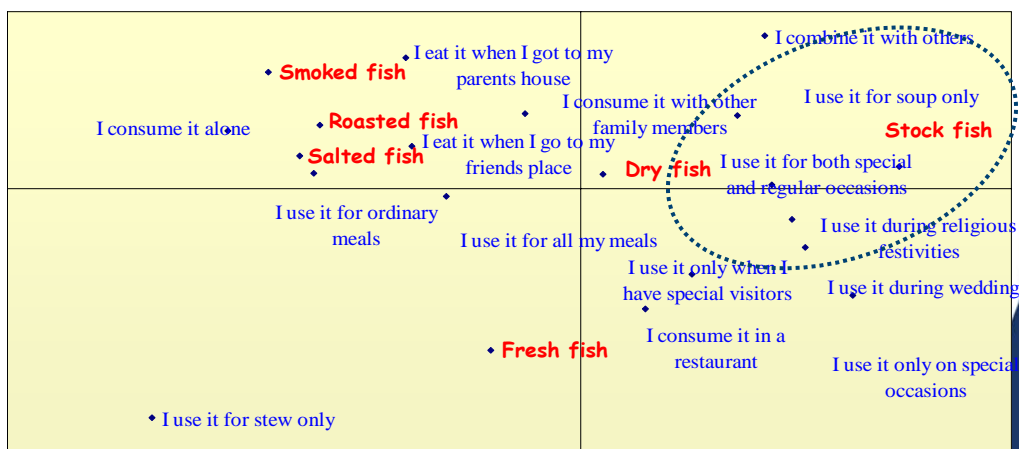
Bruksområder

Which of the different types of fish does each statement apply to?

	Dry fish	Stock fish	Fresh fish	Smoked fish	Roasted fish	Salted fish
I use it for all my meals	58	40	52	24	18	7
I use it for stew only	27	21	57	21	16	7
I combine it with others	70	80	41	31	20	7
I eat it when I go to my parents house	30	37	28	25	18	7
I consume it with other family members	65	77	65	43	27	11
I use it for soup only	44	61	37	21	16	9
I use it during weddings	32	47	38	11	11	5
I consume it alone	30	31	36	25	26	6
I use it for both special and regular occasions	50	72	56	21		6

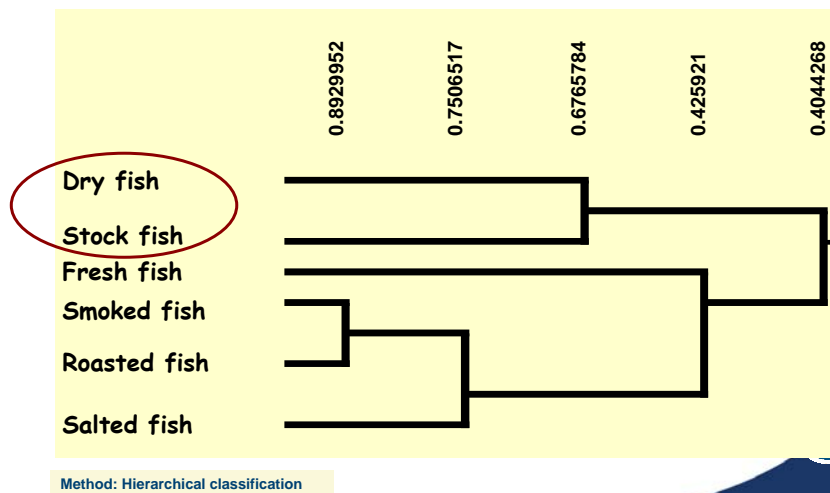
Bruksområder

Which of the different types of fish does each statement apply to?



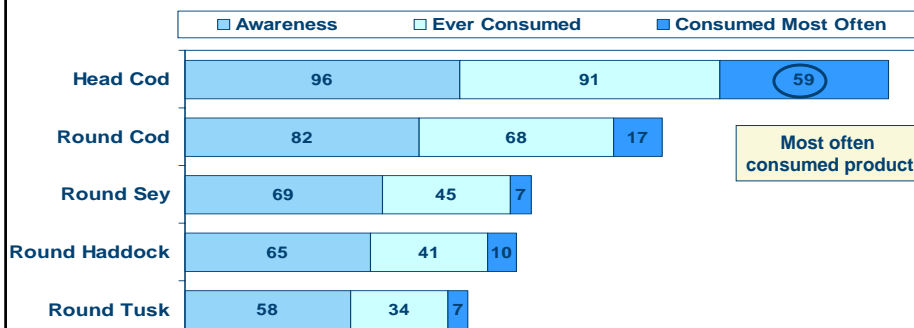
Method: Binary Correspondence Analysis

Bruksområder – potensiale for substitusjon



Kjennskap og bruk av tørrfisk

Which of the following types of stock fish are you/have.....?



All respondents

Konsumfrekvens - tørrfisk

When last did you consume.....?

Head cod enjoys more frequent usage, ie. more than half (58%) of all consumers claimed to have consumed it within a week, while for the other types of stock fish, they are less frequently consumed.

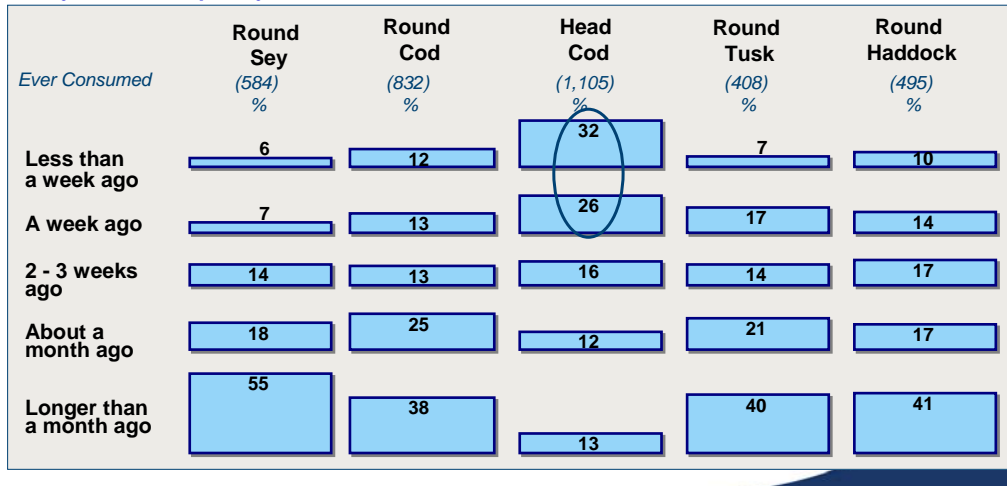


Image assosiasjon

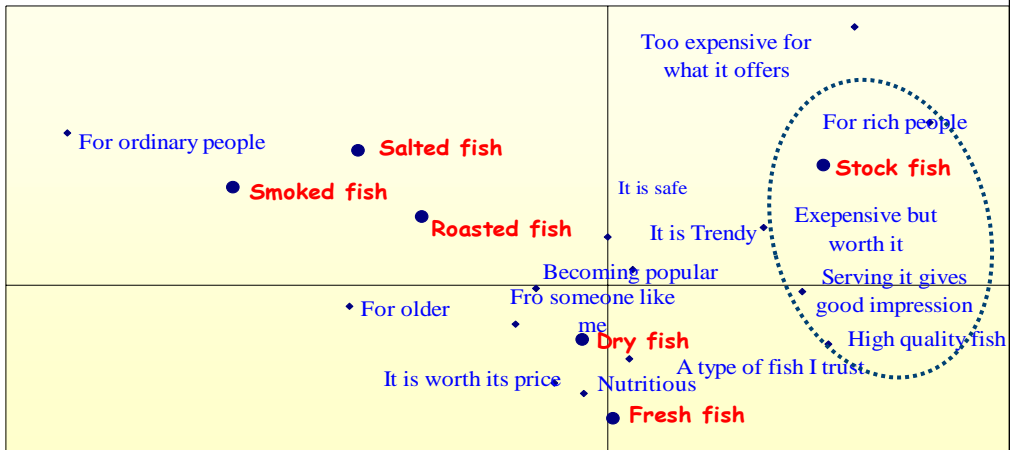
	Dry fish	Stock fish	Fresh fish	Smoked fish	Roasted fish	Salted fish
Expensive but worth it	45	63	43	18	13	5
For someone like me	64	60	67	34	26	11
For rich people	32	78	40	12	26	8
It is trendy	49	58	54	27	21	8
For ordinary people	44	24	44	54	30	14
Becoming popular	53	57	58	31	23	9
It is safe	68	69	53	26	23	9
For older people	47	35	50	36	19	9
Too expensive for what it offers	25	56	23	13	12	4
A type of fish I trust	58	64	65	27	18	8
Nutritious	56	63	80	28	24	11
Serving it gives good impression	46	76	60	18	17	5
It is worth its price	48	49	60	26	17	6
High quality fish	52	78	65	16	16	6



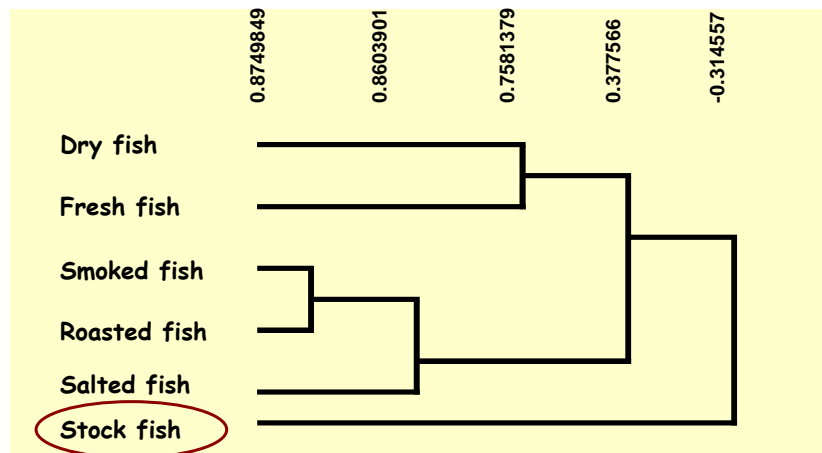
Image assosiasjon

Which of the different types of fish does each statement apply to?

The various types of fish are differentiated in image. Stock fish is seen more as a high quality product for rich people, it is expensive but worth its price. Its perceived higher cost therefore gives a good impression when it is served.

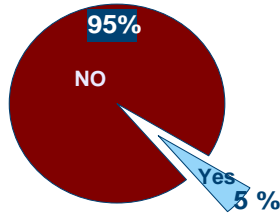


Tørrfisk: unik posisjon i markedet

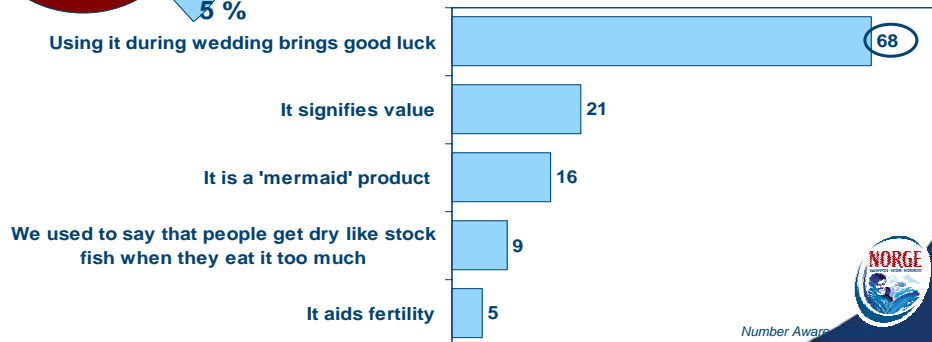


Assosiasjoner til myter

Are you aware of any myth associated with stock fish?



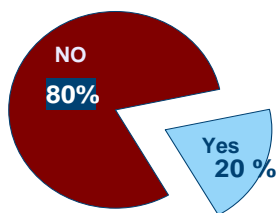
Very few consumers associate stock fish with any particular myth. However those who do, believe that stock fish brings good luck to a marriage.



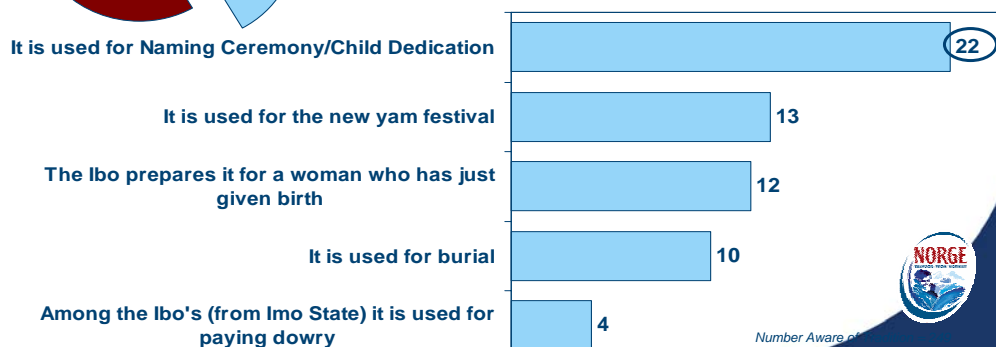
Number Aware of

Assosiasjoner til tradisjoner

Are you aware of any tradition associated with stock fish?



A fifth of all consumers were able to associate stock fish with some traditions. These traditions revolve mainly around celebration.



Number Aware of

Tradisjon - handelsaktører

Are you aware of any tradition associated with stock fish consumption?

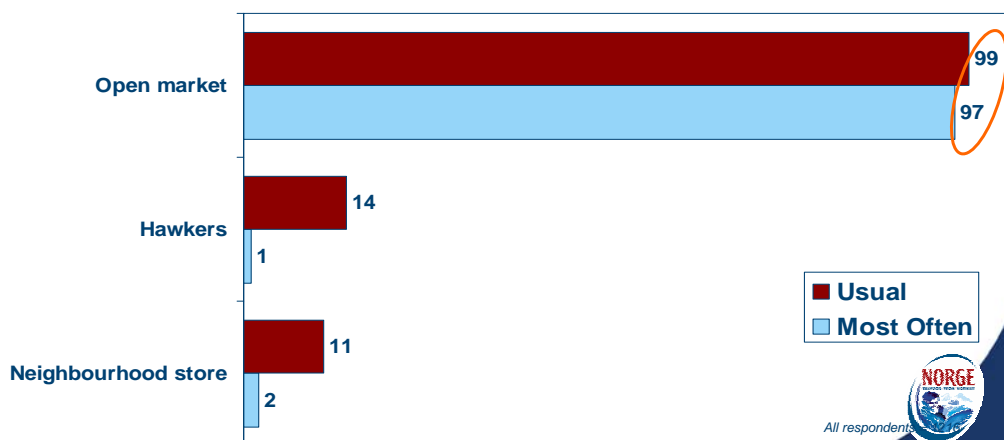
All respondents = 302



Innkjøpssted

Where do you usually/most often buy your stock fish?

For the various types of stock fish, the open market emerges as the most patronised outlet for purchase.



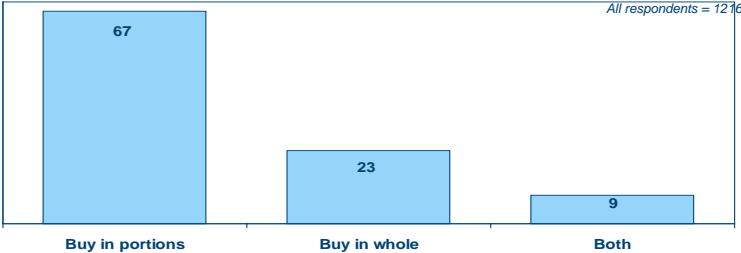
All respondents



Produktform ved kjøp av tørrfisk

How do you usually buy your stock fish?

2/3 of consumers buy their stock fish in portions



Kjøpsfrekvens

And how often do you buy stock fish?

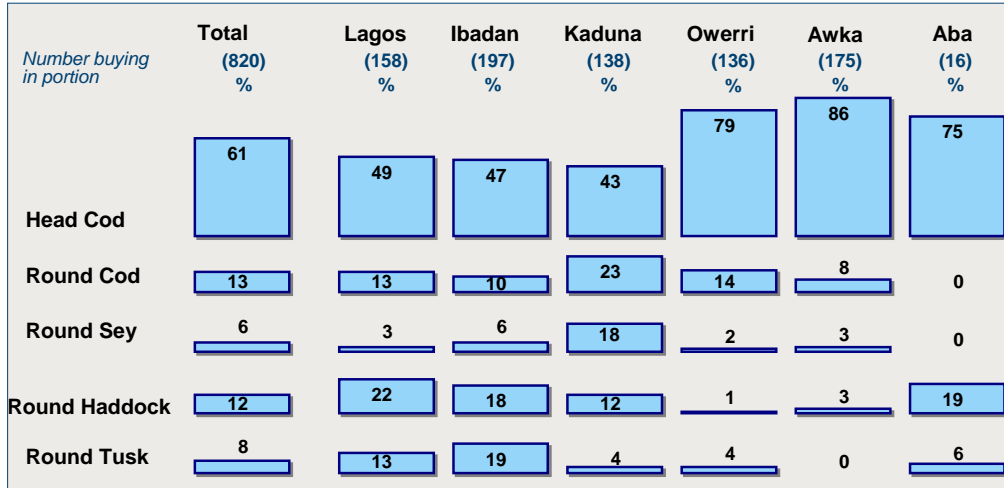
Stock fish is usually bought at least once a month, although more often in Awka and Aba (Ibo region)

All respondents	Total (1216)	Lagos (200)	Ibadan (211)	Kaduna (202)	Owerri (199)	Awka (204)	Aba (200)
	%	%	%	%	%	%	%
Every day	4	1	1	1	1	0	24
4- 6 times a week	1	0	2	0	2	0	1
2- 3 times a week	13	3	6	7	14	15	33
Once a week	26	9	32	24	14	48	28
2- 3 times a month	23	31	22	19	40	19	7
Once a month	29	49	30	47	28	13	8
Less often	4	9	6	2	3	5	1

Produktvalg ved kjøp

Which type do you regularly buy?

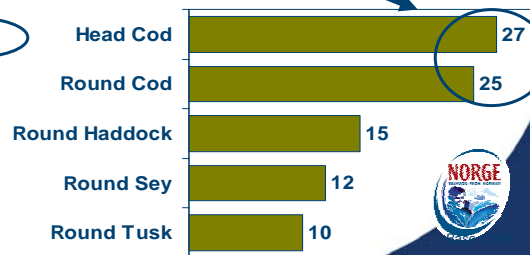
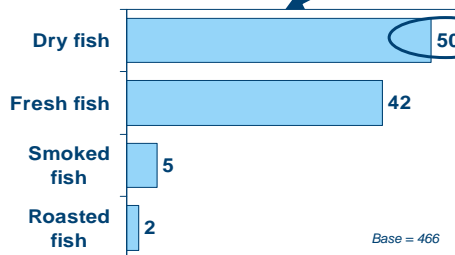
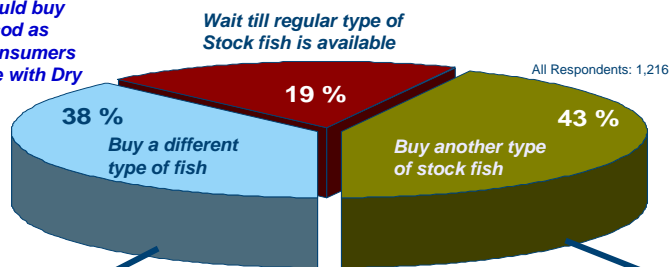
Head cod is the type of stock fish usually bought



Substitusjon

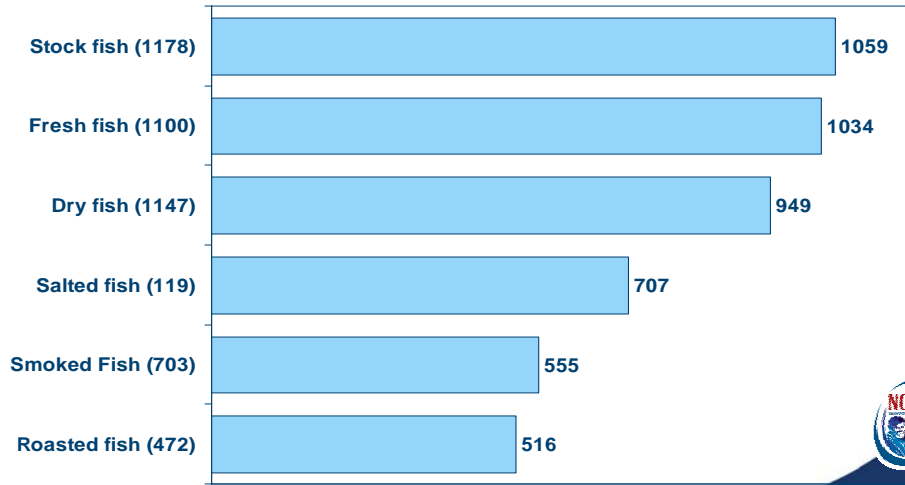
If your regular type of stock fish is not available at your usual place of purchase, what would you typically do?

While consumers would buy Head cod or Round cod as substitutes, some consumers would also substitute with Dry fish instead



Månedlig forbruk per husholdning

*Figures in Naira



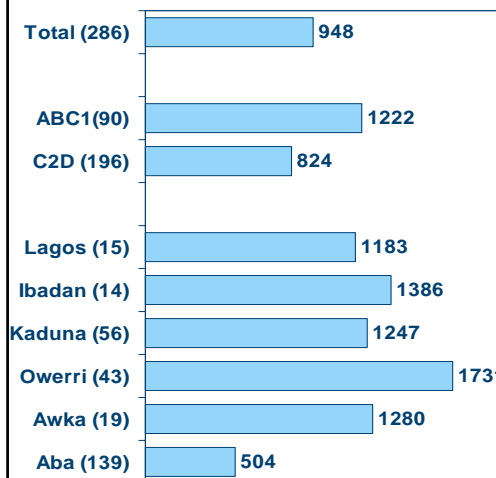
Q12



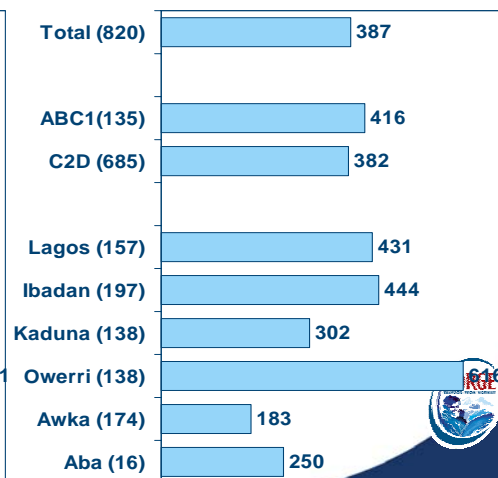
Forbruk per innkjøp

*Figures in Naira

Among those who buy Whole

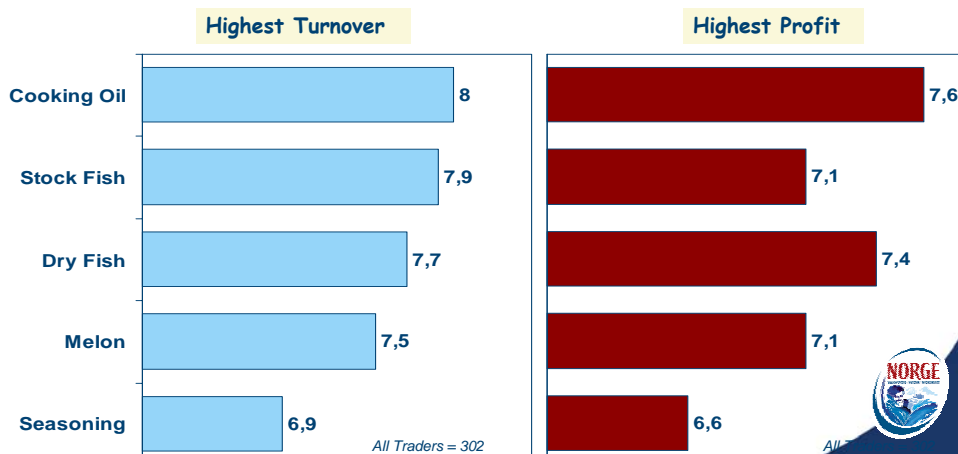


Among those who buy in Portion



Trade: Turnover vs profit

Cooking oil, stock fish and dry fish recorded the highest sales turnover. In terms of profitability, cooking oil emerges top. While Dry fish brings in more profit compared to Stock fish.



*Data is in mean scores where '1' = Lowest turnover/profit, and '10' = Highest turnover/profit

Sales vs Profit of stock fish

Which of the following stock fish types do you sell more? Which one brings in the most profit?

Traders claimed to sell more of Head cod as it brings in the most profit. Although they also claimed to sell a significant proportion of Round cod, the profit generated from its sales is not as high as the recorded sales level.

