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Thünen Institute of Market Analysis

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Consumers' preferences and consumption of dairy products in Ghana and Senegal

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- **Consumers prefer local dairy products to imported dairy products and to dairy products that are domestically processed from imported milk powder in Ghana and Senegal.**
- **Availability of local dairy products is very low resulting in a regular consumption of imported and domestically processed products.**
- **Local dairy products are seen as expensive, their safety is mostly not assured, diversity in products is low, and their processing largely remains artisanal.**
- **Imports ensure a reliable access to affordable dairy products for consumers.**
- **Food safety standards should be enforced by the appropriate authorities to address consumers' safety concerns.**

Background and aims

The end of the European Union's milk production quotas in 2015 coupled with other factors in the global milk market such as favourable prices has resulted in an expansion of European dairy companies' operations in developing nations, particularly in West Africa. The fast-growing dairy sector in this region makes it one of the most important contributors to employment and income. Various dairy products are imported by West African countries. Besides, the processing industry that relies on milk powder has seen a significant growth over the last two decades, and an increase is expected in consumer preferences for more diversified dairy products implying further growth of the sector.

This consumer analysis is part of the project "Impact of Meat and Milk Product Exports on Developing Countries" (IMMPEX). In this project, we analyse the effects of German and European exports of poultry and dairy products on the agri-food sectors and on consumers in Ghana and Senegal. The aim of the project is to develop and evaluate measures to avoid or reduce undesirable effects of these exports.

In this report, we summarize the research on dairy products in Ghana and Senegal as part of the fourth work package of IMMPEX. The focus is on consumer perceptions and preferences, as well as consumption habits with respect to dairy products in urban regions in Ghana and Senegal. We differentiate between three types of dairy products; (i) products made from fresh local milk 'local products', (ii) domestically processed products from imported milk powder, and (iii) imported products.

Methods and data

The study dwelt on both focus group discussions and household surveys. The focus groups were held with 36 participants in

Dakar and Thiès (Senegal) between February and March 2020. The household surveys occurred in March 2021 in Ghana in three cities – Accra, Kumasi, and Tamale and from January to February 2022 in Senegal also in three cities - Dakar, Thiès, and Kolda. A multi-stage sampling procedure was applied in the survey. A total of 312 and 532 households were interviewed in Ghana and Senegal respectively. The data were analysed using mixed methods including qualitative content analysis, exploratory factor analysis, and an ordered and binary logit models.

Household survey in Thiès, Senegal



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Key findings

The focus group discussions revealed that Senegalese consumers perceive local dairy products as more natural, healthier and tastier compared to imported and domestically processed products. The latter are perceived as not fresh and unnatural, i.e., adulterated with fat from vegetable sources. In contrast, participants evaluated the price, availability, diversity

and safety of local products as less favourable. Imported milk products on the other hand are available in a wide variety of forms (powdered, sweetened or unsweetened, concentrate, skimmed, whole or liquid) as yoghurts, ice cream, evaporated milk, milk powder, UHT, cheese, or butter. It also emerged from the quantitative survey that Ghanaian respondents prefer local milk and its products because they perceive them as having a high nutritional value and as being tastier, healthier, more natural, and fresher. Dairy products are generally consumed on a regular basis in both countries. In Senegal, milk and its products are a component of traditional dishes. According to results of the quantitative survey, 98 % and 76 % of households stated to consume dairy products at least 2 to 3 times a week in Senegal and in Ghana respectively. Here, dairy products are often consumed with breakfast cereals and beverages and thus included in meals.

Production of a local dairy product (Wagashi) in Ghana



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To understand consumer behaviour with regards to product origin, we focused on yoghurt for a further in-depth analysis. In both countries, yoghurt is the sole product available as local, domestic and imported. We found a significant proportion of respondents in Ghana (43 %) who have never consumed local yoghurts compared to 14 % in Senegal. Most Senegalese (43 %) consume local yoghurt occasionally. Thus, the most frequently consumed types of yoghurt are those domestically processed from imported milk powder and those which are imported. The findings show that consumption frequencies are largely driven by availability. Local yoghurts are scarce to find which is encouraging the consumption of domestic and imported yoghurt in both countries. There has never been a shortage of both imported and domestically processed dairy products on the market.

Generally, higher income increases the regular consumption of all types of yoghurt in both countries, as well as higher education in the case of Ghana. In addition, consumers who perceive local dairy products as unhygienically produced and unsafe have a lower tendency to consume local yoghurts in Ghana. However, we observe that hygiene and safety concerns do not play a role in Senegal as in Ghana which shows that Senegalese consumers may have limited knowledge about foodborne illnesses.

Furthermore, low product diversity and low value addition to local milk decreases regular consumption of local yoghurt in both countries but increases regular consumption of domestic and imported yoghurt. Low value addition includes poor and unattractive packaging, missing certification and labelling. The processing of local dairy products remains to a large extent traditional and is technically not modernised. The product range is limited to few products, such as fresh milk, yoghurt, wagashi (cottage cheese), and curdled milk.

Ethnocentric attitudes were displayed and expected to influence the choice of local over domestic and imported products. However, a significant positive influence of ethnocentrism is seen on the consumption of domestic and imported dairy products, revealing an “attitude-behaviour gap” in the purchase of dairy products in both countries. Consumers may demonstrate their preference for a specific product, however, final purchase decisions to a large extent can depend on factors such as “availability” and “affordability”. Actors in the value chain can see this as an opportunity to fill certain niches of local specialties that attract (a group of) consumers and for which those consumers are willing to pay.

From a broader lens, imported dairy products, especially milk powder, contributes to ensuring food security in Ghana and Senegal. In the case of Senegal where most traditional dishes are milk based, milk powder and its products are a supplement to scarce local milk.

Conclusion

In both countries, consumers have positive perceptions and preference for local milk and its products but primarily consume imported and domestically processed as well as imported products mainly because of low availability and higher prices.

- Imports are therefore important so that consumers have access to affordable dairy products, at least for traditional, cultural and food security reasons.
- Food safety concerns require the intervention of governments. Policies could aim at creating a quality control system in the local milk value chain and food safety standards could be enforced by the appropriate authority.
- Awareness campaigns could be organised by e.g., the government and consumer protection associations to educate and inform consumers on the indicators of contaminated food and the health risks associated with consuming them.

Further Information

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