

SUPERMARKETS OUT OF AFRICA!

Food systems across
the continent are doing
just fine without them



Matilda Moses sells tomatoes in Tudu Market, part of a sprawling district of open-air and covered markets in Accra, Ghana.
Photo: Yepoka Yeebo

Africa's food systems are a final frontier for multinational food companies and retailers. Most Africans still consume a healthy diet of traditional foods, supplied by millions of small vendors and small farmers across the continent. But this is slowly changing as global food companies and retailers adopt new strategies to expand their presence on the continent, led by the aggressive actions of some multinational supermarket chains. The livelihoods of millions of small vendors and local farmers are at risk, as are people's health and the continent's diverse traditional food cultures. While African governments do little but facilitate this expansion of foreign supermarkets, small vendors, farmers and urban consumers are coming together to defend their local food systems.

It is July 2018 and the small vendors of the bustling Gueule-Tapée market in Dakar, Senegal are outraged. They have just heard that the local mayor plans to demolish their market and build a four story shopping mall in its place. To make matters worse, the media is reporting that part of the mall would be occupied by the French supermarket giant Auchan.

"They may walk over our dead bodies but we won't let it happen," warns Mbaye Ndiaye, the president of the market's management committee.¹

The Gueule-Tapée vendors quickly organise a sit in, with each vendor sporting a red T-shirt marked with the slogan: "Auchan dégage!" (Auchan get out).

The "Auchan dégage" slogan is actually borrowed from another group of vendors who launched a campaign a couple of weeks prior at the Castor market in another part of Dakar. They were fed up with how the new Auchan stores were taking away their customers, with unjustifiably low prices on some food items.

"Auchan is even selling small bags of *Daakhaar* (ginger) and pretty much all other spices sold in our market. So we have lost all our customers. All of them have been taken by Auchan. At this rate, it will not just be Senegal's small vendors who will go out of business but also the markets and, after that, the economy of the

whole country," said Leyti Sène, the General Secretary of the newly formed *Auchan dégage* collective.²

"We are ready to fight," says Mohamed Moustapha Leye another *Auchan dégage* collective member. "This is about our survival. Even the women vendors here selling small items have lost all their clients."³

Auchan is not the first or the only supermarket chain to try and expand into West Africa. But it is trying out a new strategy. The other foreign retailers operating in the region, such as Carrefour and Casino, have focused on selling imported, luxury foods to a wealthy elite that makes up no more than 5-10% of the population. They moved into the wealthier neighbourhoods offering a selection of items and prices that mirrors the strategy of their European stores. While these retailers have been able to take some market share away from small vendors in African cities, it has never been significant.

"We are not elitist, but very qualitative," explains Gilles Bin, director of foods for Mercure International, which is Casino's franchise partner for its African retail

1. "Marché Gueule Tapée : «le Maire Va Passer Sur Nos Cadavres Si...»," Sen360: 5 July 2018: <https://news.sen360.sn/societe/marche-gueule-tapee-le-maire-va-passer-sur-nos-cadavres-si-1081395.html>

2. "Contre la colonisation du marché sénégalais: «Auchan dégage» lancé par les commerçants de Castors," Senxibaar, 26 June 2018: <http://www.senxibaar.com/actualite/contre-monopolisation-marche-senegalais-auchan-degage-lance-commerçants-de-castors/>

3. Olivier Liffra, "Sénégal : Auchan accusé de nuire au petit commerce," Jeune Afrique, 4 July 2018: <http://www.jeuneafrique.com/588593/economie/senegal-auchan-accuse-de-nuire-au-petit-commerce/>

operations. “We cater to the needs of the middle and upper classes, who wish to find the same products in our stores that they find in France.”⁴

Auchan has a different strategy. In Senegal, the company has established 25 discount supermarket and convenience stores across the country, targeting popular urban neighbourhoods that other foreign retailers have avoided. Auchan is openly going after customers that are currently served by small, local food vendors, and the company says it will make profits through high volume sales, not margins.

“Our wish is to provide stores that are modern, clean, and air-conditioned, that guarantee food safety and offer prices in line with those of local markets,” says Laurent Leclerc, managing director of Auchan’s Senegal operations. “If we can do this, we will get all the customers of Senegal!”⁵

Auchan is already moving to expand into neighbouring Mauritania and Ghana with the same strategy, and has inspired other foreign retailers to follow suit. Recently, Casino started to roll out its own discount stores in Senegal, through its Leader Price chain.

But Auchan’s aggressive moves have generated a backlash. Small vendors are the first to feel the effects and have initiated protests, and this has quickly melded into a much larger rejection of the foreign takeover of the country’s food system.

People are rightly concerned that this invasion of supermarket chains will ruin the livelihoods of small vendors, destroy markets for local farmers and encourage people to abandon traditional foods for “cheap” processed foods. It is also obvious to people that these foreign companies will drain the money generated by the country’s food economy into the pockets of their shareholders and those of the multinationals that supply the foods they stock on their shelves.

Government authorities do not seem to grasp the scale of the problem. In Senegal and other African countries now being targeted by multinational retailers, there is a glaring absence of regulations to protect people from these powerful entities. It is telling that one of the main demands of the *Auchan dégage* collective is simply

that their government presents some evidence that it has at least assessed the impacts of large supermarkets.

The sad reality is that African governments are much more interested in regulating and criminalising the small-scale markets and street vendors who provide the continent with the vast majority of its food. If a supermarket tsunami is about to land on the shores of the continent, African governments are totally unprepared. The people are going to have to rise up to defend their food systems, as they are doing in Senegal.

Supermarkets struggle with their invasion of Africa

The “supermarket wave” has yet to wash over sub-Saharan Africa, as it has in other parts of the world. After decades of trying, supermarket chains have only managed to conquer a big chunk of food retail space in South Africa and, to a lesser extent, some of its neighbouring countries. They have made some gains in a few North African countries, but their share of the overall food market remains small there too.

By and large, with the exception of southern Africa, supermarkets have failed to penetrate deeply into Africa’s food markets, and have been relegated to the elite margin of society. They have not been able to compete with the continent’s dynamic people’s markets, which are often referred to as “informal” markets.

The vast majority of Africans still go to buy their foods at traditional open-air markets and small street-side stalls. Outside of South Africa and Kenya, these local markets and small vendors accounts for 80–90% of all food sales.⁶ Even in Kenya, which has one of the most developed supermarket sectors on the continent, supermarkets only control 5% of sales of fresh fruit and vegetables.⁷ In Côte d’Ivoire, a leading francophone Africa supermarket destination, supermarkets account for only 10% of overall food sales, with some studies saying that it is only 2–3%.⁸

4. “Spécial Afrique : entretien avec Gilles Blin, directeur alimentaire de Mercure International, affilié Casino et U,” *Linéaires*, 3 February 2016: <http://www.lineaires.com/LA-DISTRIBUTION/Les-actus/Special-Afrique-entretien-avec-Gilles-Blin-directeur-alimentaire-de-Mercure-International-affilie-Casino-et-U-47970>

5. Bintou Bathily, “Afrique subsaharienne : quand Auchan se mesure aux petits marchands,” *Jeune Afrique*, 2 July 2015: <http://www.jeuneafrique.com/mag/241295/economie/afrique-subsaharienne-quand-auchan-se-mesure-aux-petits-marchands/>

6. AT Kearny, “Retail in Africa, Still the Next big thing,” 2015:

<https://www.atkearney.com/documents/10192/6437503/Retail+in+Africa.pdf/b038891c-0e81-4379-89bb-b69fb9077425>

7. Hungry Cities, “The Urban Food System of Nairobi, Kenya,” Report No. 6, 2017: <http://hungrycities.net/wp-content/uploads/2017/11/HC6.pdf>

8. Marie-José Neveu Tafforeau, “Grande distribution : quelles opportunités pour les filières agroalimentaires locales ? Enquête en Côte d’Ivoire,” *FARM*, March 2017: http://www.fondation-farm.org/zoe/doc/notefarm10_grdedistri_mars2017.pdf

Table 1 shows the main multinational supermarket chains operating in Africa.

Supermarket chain	Subsidiaries	Home country	Countries	Partners	Notes
Choppies	Ukwala (Kenya)	Botswana	Botswana, Kenya, Tanzania, Mozambique, South Africa, Zimbabwe, Zambia		Ukwala is 75 percent owned by Choppies, a Botswana-based supermarket chain, whose stock is listed on both the Botswana Stock Exchange and Johannesburg Stock Exchange, with 157 stores in Africa. The remaining 25 percent shareholding is held by Export Trading Group
Prosuma/Casino	Bonprix, Hayat, Miniprix, Casino Mandarine, Trade Center, Sococo, New Cash Ivoire, and Leader Price	Côte d'Ivoire	Côte d'Ivoire		Prosuma is owned by families of CI businessmen Sakhr Fakhry et Abou Kassam and, since 1998, Mercure International of Monaco (MIM). Prosuma has had a partnership with Casino since 2016.
Système U	Super U	France	Benin, Cameroon, Togo	Mercure International, also partner to Casino (Cameroon), Erevan (Benin)	
Auchan	Atac and Citydia (Senegal), Citydia (also in Ghana), Magasin Général des frères Bayahi (Tunisia)	France	Mauritania, Senegal, Tunisia	Ulysse Hyper Distribution owned by Groupe CHAIBI/UTIC (Tunisia), Limam Ould Ebnou, ex patron de Mauritanie Leasing, transformée en Banque Populaire de Mauritanie (Mauritania)	UHD in Tunisia is also the partner for Carrefour. Auchan pulled out of Morocco in 2007 when it sold its 49% stake in Mariane. In 2017 Auchan purchased the stores of the retailer Citydia from Lebanese businessman Adel Attvé,
Carrefour	Atacadão (Morocco), Label'Vie (Morocco), Metro Maroc	France	Algeria, Cameroon, Côte d'Ivoire, Egypt, Kenya, Morocco, Tunisia	Ulysse Hyper Distribution owned by Groupe CHAIBI/UTIC (Tunisia), in West Africa Carrefour is expanding through a partnership with Toyota's CFAO. In Kenya and Egypt, its partnering with Majid Al Futtaim, which has exclusive license for East Africa.	Carrefour acquired Metro Maroc in 2010. Carrefour opened a hypermarket in Algiers in 2015 after a previous failed joint venture with Arcofina
Casino	Géant, Monoprix, Leader Price	France	Cape Verde, Côte d'Ivoire, Djibouti, Guinea, madagascar, Mauritania, Morocco, Togo, Tunisia, Senegal, Cameroon, Gabon and DR Congo	Groupe Mabrouk (Tunisia), Mercure International (Côte d'Ivoire, Senegal, Cameroon, Gabon and DR Congo). Leader Price stores in Morocco and Senegal with OCS Holding of France	Casino launched its e-commerce Cdiscount through a partnership with Bolloré, but it never took off. Collapsed within a couple of years. Leader Price is its discount store.

Supermarket chain	Subsidiaries	Home country	Countries	Partners	Notes
Metro	Kheir Zaman (Egypt)	Germany	Egypt, Kenya	Mansour Holdings (Egypt)	Kheir Zaman is a discount food chain ("Kheir Zaman chain in 2006 which offers a variety of food products at affordable prices to satisfy the lower income segment of the consumers") In October 2017 the company ran out of funds and many stores are now closed. The few that are still open have no fresh food; - meat, fruit and vegetables, dairy or bakery products - and what is left of the dry grocery and non food stock is not being replenished.
Nakumatt	Payless (Uganda)	Kenya	Kenya, Uganda, Rwanda and Tanzania		
Tuskys		Kenya	Kenya, Uganda		Tuskys is a wholly Kenyan, privately held company owned by seven children of Joram Kamau, the founder of the business who died in 2002
Uchumi		Kenya	Kenya, Tanzania, Uganda		In October 2015, the store chain closed down all its stores in Uganda and Tanzania, citing unprofitability. Company is part owned by Kenya's Ministry of Trade.
Spar		Netherlands	Angola, Botswana, Cameroon, Mauritius, Mozambique, Namibia, Nigeria, South Africa, Zambia, Zimbabwe	Artee Industries Limited (Nigeria), L'Atrium SA, a joint venture between two existing family owned companies (Deelite Sarl and Groupe ARNO) (Cameroon), Webcore (Angola)	Spar's partner in Angola is Webcore (see below)
Continente		Portugal	Angola		Continente is owned by Sonae Distribuição, the largest retailer in Portugal
Teixeira Duarte Group	MAXI, Bompreço	Portugal	Angola		Big Portuguese conglomerate
Pick n Pay	Boxer	South Africa	Botswana, Madagascar, Mozambique, Zambia, Zimbabwe, Lesotho, Namibia, Mauritius, South Africa		

Supermarket chain	Subsidiaries	Home country	Countries	Partners	Notes
Shoprite	Checkers, OK Foods, USave	South Africa	Angola, DRC, Ghana, Lesotho, Madagascar, Malawi, Nigeria, Namibia, South Africa, Swaziland, Uganda, Zambia, Mozambique		Shoprite left Egypt after just five years, citing restrictive market conditions. Zimbabwe's turbulent economy proved too much for Shoprite's strategy and it closed shop in Bulawayo in 2013. A year later, it threw in the towel in Tanzania, saying the country largely favored market food shopping over a formal retail establishment.
Woolworths		South Africa	Mozambique, Namibia, South Africa, Zambia		Woolworths has a presence in 11 countries outside of South Africa. According to Disberry, only about 20% of Woolworths' African operations are food stores, while the majority sell clothing. In November 2013, Woolworths announced that it would be pulling out of its three stores in Nigeria, a mere year and a half after it first entered the market.
Distribuidora Internacional de Alimentacion SA (DIA)	Citydia	Spain	Côte d'Ivoire, Ghana, Guinea-Conakry, Nigeria	Mata Holding (Côte d'Ivoire), First Master Retailers (Nigeria)	Dia is a discount supermarket chain that has franchised its Citydia supermarket stores in several African countries, including Côte d'Ivoire, Ghana, Guinea, Nigeria, and Senegal. Its stores in Senegal were recently taken over by Auchan.
Webcore Group	InterMarket	Switzerland	Angola		Webcore Group is a food commodities trader that also owns AngoAlissar, the largest importer of foods into Angola

Supermarket chain	Subsidiaries	Home country	Countries	Partners	Notes
Walmart	Massmart divisions include: Massdiscounters - Game (South Africa, Botswana, Ghana, Malawi, Mozambique, Namibia, Nigeria, Tanzania, Uganda, Zambia and Kenya); Masswarehouse- Makro (South Africa), The Fruitspot (South Africa); Masscash- (South Africa); Botswana, Lesotho, Mozambique, Namibia, and Swaziland), Jumbo Cash and Carry (South Africa and Botswana), Trident (Botswana); Cambridge Food (South Africa); Shield (South Africa, Botswana, Lesotho, Namibia, and Swaziland)	US	South Africa, Botswana, Ghana, Lesotho, Malawi, Mozambique, Namibia, Nigeria, Tanzania, Swaziland, Uganda, Zambia and Kenya		Massmart is 51% owned by Walmart and 21% by Aberdeen Asset Management PLC. Masscash consists of a Wholesale Division with cash and carry food and cosmetics businesses, and Retail food outlets which target the lower LSM groups. Massdiscount was an electronics and furniture store, but has moved into foods.

Source: Perqin, August 2017

<http://docs.preqin.com/reports/Preqin-Special-Report-Natural-Resources-Top-100-August-2017.pdf>

Table 2. Contributions of street foods to daily adult energy intake in a selection of African cities and countries¹

City or Country	Percentage daily energy intake (EI) from street foods
Abeokuta, Nigeria	50.3 % EI for males; 48.3 % EI for females
Ougadougou, Burkina Faso	46 % EI
Nairobi, Kenya	27-36 % EI for males; 13-22 % EI for females
Uganda	22.4-25.6 % EI
Bamako, Mali	18.3% EI
Cotonou, Benin	40 % EI for children
Nairobi, Kenya	13.4-22.4% EI for children
Bamako, Mali	18.3 % EI for children
Rural areas of Kenya	13.5-20.8% EI for males; 12.8-17.3% EI for females

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1. https://www.cambridge.org/core/services/aop-cambridge-core/content/view/2B44AB4E6EF5D992DAD8AEE39B5E5F0F/51368980013001158a.pdf/nutritional_contribution_of_street_foods_to_the_diet_of_people_in_developing_countries_a_systematic_review.pdf



July 2018: Small vendors of the Gueule Tapée market in Dakar, Senegal, demonstrate against the municipality's plans to demolish their market and build a shopping mall in its place. Part of the mall would be occupied by the French supermarket giant Auchan. Photo: Dave Design.

When it comes to prepared foods, the overwhelming choice among Africans is to buy from street food sellers, not retail stores. Street foods are among the highest sources of energy and protein for people in many parts of Africa, including for children (see Table 2). In Nigeria, for instance, people rely on street foods for over half of their total daily protein intake.⁹

Even in an urban center like Maputo, Mozambique, where there are numerous supermarkets, over 90% of households purchase foods through small vendors at least once a week, and many on a daily basis.¹⁰ The same goes for Nairobi, one of the top African urban destinations for supermarkets; more than 80% of the foods

purchased in the city are from small vendors.¹¹ In Accra, where supermarkets are also rapidly expanding, a recent survey found that 73% of respondents still prefer to buy their foods from traditional markets, whereas only 8.7% prefer supermarkets.¹²

What the available research shows is that people mainly shop at supermarkets for bulk staple items and processed and packaged foods, and they do so infrequently — only once or twice a month. Most Africans purchase food on a daily or near daily basis, and they continue to rely on small shops and local markets for these purchases, even in southern Africa, where the level of supermarket penetration is quite high.¹³

9. Nelia Patricia Steyn, "Nutritional contribution of street foods to the diet of people in developing countries: a systematic review," *Journal of Public Health Nutrition*, 17 (6): 2013: https://www.cambridge.org/core/services/aop-cambridge-core/content/view/2B44AB4E6EF5D992DAD8AEE39B5E5F0F/S1368980013001158a.pdf/nutritional_contribution_of_street_foods_to_the_diet_of_people_in_developing_countries_a_systematic_review.pdf

10. Abel Chikanda and Inês Raimundo "The Urban Food System of Maputo, Mozambique," *Hunry Cities Report No. 2*, 2016: <http://hungrycities.net/publication/hcp-report-no-2-urban-food-system-maputo-mozambique/>

11. Hungry Cities, "The Urban Food System of Nairobi, Kenya," Report No. 6, 2017: <http://hungrycities.net/wp-content/uploads/2017/11/HC6.pdf>

12. Alexandra Therien, "The Impact of the Rise of Supermarkets on Household Urban Food Security: A Case Study of Accra, Ghana," Thesis presented to The University of Guelph, January 2017: https://atrium.lib.uoguelph.ca/xmlui/bitstream/handle/10214/10248/Therien_Alexandra_201702_MA.pdf?sequence=1

13. See African Food Security Urban Network (AFSUN): <https://www.afsun.org/>

Why is this happening? Part of the reason is the proximity of small shops and markets, and the small quantities that they offer. This is key for clients on a tight budget who have little access to storage space and refrigeration at home. Researchers say that the access to credit offered by local vendors is also important. But another major component is price. Local vendors and markets tend to sell cheaper than supermarkets, even in South Africa, where the formal retail sector is highly developed.

A study in Durban, South Africa found that the average price of products in supermarkets was 76% higher than from small vendors. Price differences were “particularly acute in fresh produce.” For a basket of nine staple goods including onions, tomatoes and potatoes, consumers paid 112–125% more in a supermarket than from small vendors.¹⁴

Undermining Africa's food systems

The other advantage that the people's food markets in Africa have over supermarkets is their connections to small farmers and local food suppliers. Supermarkets are, for the most part, unable and unwilling to procure their foods from these local supply chains. They impose standards and demands that are totally out of sync with the small farmers who supply 80 percent of the food produced on the continent. These farms tend to produce traditional food crops based on local seed varieties, which may appeal to local consumers but do not meet the supermarket's notion of “quality.”

Some supermarkets have tried to develop local supply chains by getting farmers to grow food for them, according to their standards. But there's been little success. Casino's partner Mercure International recently tried to develop a local sourcing programme for its Prosuma supermarket chain in Côte d'Ivoire, involving a detailed contract and the provision of seeds and chemical inputs. It failed with 90% of the participating farmers.¹⁵

Small local food companies also have a hard time complying with the various standards and requirements of supermarkets, such as labelling and packaging or delayed payment schemes or fees that suppliers have

“Casino's DRC store imports all its fresh fruit and vegetables from France and South Africa!”

to pay to get their products on supermarket shelves.¹⁶ Instead, the supermarkets are stocking imported brands from the multinational food companies they are already know.

“They judge us on pricing and branding and they forget that we are new entrants. Also, you are competing with global brands because the market is liberalised. We are competing with American Garden, Heinz, products from Kenya. Remember, some of these products have been around for over 50 years,” says Dorothy Kimuli, the owner if the Ugandan company producing Kim's Chilli Sauce.

The *Association citoyenne de défense des intérêts collectifs* (ACDIC) did a survey of products stocked on the shelves of both foreign and domestic supermarkets in Cameroon's capital, Yaoundé. They found that local products accounted for only 2% of the total.¹⁷ Another study of national and foreign-owned supermarkets in Ghana found that imported products outnumbered local ones by more than four to one.¹⁸

Casino admits that the majority of what it sells at its African supermarkets are imported, accounting for as much as 80% of the products at its store in the

14. : C. Skinner and G. Haysom, “The informal sector's role in food security: A missing link in policy debates? Working Paper 44. Cape Town: PLAAS, UWC and Centre of Excellence on Food Security, 2016: <http://www.plaas.org.za/sites/default/files/publications-pdf/WP44%20SkinnerHaysom.pdf>

15. Marie-José Neveu Tafforeau, “Grande distribution :quelles opportunités pour les filières agroalimentaires locales ? Enquête en Côte d'Ivoire,” FARM, March 2017: http://www.fondation-farm.org/zoe/doc/notefarm10_grdedistri_mars2017.pdf

16. See for example, Reena das Nair, “How SA's big supermarket chains keep out small suppliers,” Fin24, February 2017: <https://www.fin24.com/Opinion/how-sas-big-supermarket-chains-keep-out-small-suppliers-20170203>

17. Omer Mbadi, “Cameroun : face à Carrefour, les supermarchés fourbissent leurs armes,” Jeune Afrique, 19 July 2017: <http://www.jeuneafrique.com/mag/455320/economie/cameroun-face-a-carrefour-supermarches-fourbissent-leurs-armes/>

18. USDA GAIN Report, “Ghana”, 22 May 2017: https://www.pma.com/-/media/pma-files/retail-foods-report-_accra_ghana_5222017.pdf?la=en

DR Congo. Incredibly, Casino's DRC store imports all its fresh fruit and vegetables from France and South Africa!¹⁹

Carrefour is one of the supermarkets that claims to be making a lot of effort to source locally, and it now has contracts with 180 local suppliers for its large Abidjan hypermarket. But this still accounts for only 10% of its overall sales.²⁰

The supermarkets do understand, however, that their reliance on imports makes it hard for them to reach the average African consumer. When asked if they are considering opening their discount Netto grocery stores in Africa, the general manager of the French retailer Les Mousquetaires replied: "Surely not the Netto stores. Given the weight and cost of imported products, a discount store cannot compete with the prices in the informal sector in Africa."²¹

So how is Auchan doing it? Auchan's discount supermarket strategy in Senegal coincides with and depends upon a parallel expansion of foreign-processed food brands into Africa and the emergence of a small number of large, African-based food processing companies. Auchan's discount Atac stores in Senegal stock plenty of Nestlé processed foods, as well as products supplied under contract by fast-growing national processed food companies like Patisen, Saprolait, Finamark, and Kirène. (See Box: Auchan's "food baskets") For poultry, they are negotiating with Sedima, the country's largest poultry producer, even as they are rumoured to be behind the government's recent decision to lift barriers on frozen chicken imports.²²

When supermarkets like Auchan talk about local supply chains in Africa, what they really mean is the transplantation of the chains that they have developed elsewhere with their large multinational food company partners. For them, the existing systems and distribution networks that currently provide Africans with their food needs are of little interest. Take, for instance, this response by the head of the French retailer Système U's African operations to a question about the corporation's reliance on imports. "Local sourcing is developing in certain African countries, but local food production remains greatly insufficient, despite the establishment of a few factories by multinational companies," he said.²³

Shifting diets towards highly processed foods

It is well documented that supermarkets encourage the consumption of "ultra-processed foods"-- packaged foods like soft drinks and biscuits that are high in salt, sugar and vegetable oil.²⁴ It is also known that the consumption of these foods is a cause of numerous health problems, most notably the increased levels of obesity and type 2 diabetes now affecting much of the world.²⁵ Africa has been less affected because of the persistence of traditional foods and diets, and the low levels of consumption of highly processed foods. As a whole, dietary patterns in Africa rank healthier than those in North America, Europe and other parts of the world where supermarkets exercise high levels of control over retail food sales.²⁶

But this is changing, and, as the presence of supermarkets and multinational food companies expands

19. Julien Cléménçon, "Distribution : MIM, de l'ambition en rayon pour l'Afrique de l'Ouest, Jeune Afrique, 7 March 2012: <http://www.jeuneafrique.com/142721/economie/distribution-mim-de-l-ambition-en-rayon-pour-l-afrique-de-l-ouest/>

20. Marie-José Neveu Tafforeau, "Grande distribution :quelles opportunités pour les filières agroalimentaires locales ? Enquête en Côte d'Ivoire," FARM, March 2017: http://www.fondation-farm.org/zoe/doc/notefarm10_grdedistri_mars2017.pdf; "Quand Carrefour aide les filières locales," Les Échos, 22 December 2015: https://www.lesechos.fr/21/12/2015/LesEchos/22091-067-ECH_quand-carrefour-aide-les-filieres-locales.htm#I3OycdOKloZBwI5X.99

21. "Thierry Vetter, directeur général de Geprocor, filiale export des Mousquetaires", Les Linéaires, 5 February 2016: <http://www.lineaires.com/LA-DISTRIBUTION/Les-actus/Special-Afrique-Thierry-Vetter-directeur-general-de-Geprocor-filiale-export-des-Mousquetaires-47994>

22. Bintou Bathily, "Afrique subsaharienne : quand Auchan se mesure aux petits marchands," Jeune Afrique, 2 July 2015: <http://www.jeuneafrique.com/mag/241295/economie/afrique-subsaharienne-quand-auchan-se-mesure-aux-petits-marchands/>

23. "Yves Petitpas, président de U Export, en charge des magasins U dans les Dom-Tom et à l'étranger," Les Linéaires, 4 February 2016: <http://www.lineaires.com/LA-DISTRIBUTION/Les-actus/Special-Afrique-Yves-Petitpas-president-de-U-Export-en-charge-des-magasins-U-dans-les-Dom-Tom-et-a-l-etranger-47975>

24. See for example, PP Machado et al., "Price and convenience: The influence of supermarkets on consumption of ultra-processed foods and beverages in Brazil," Journal of Appetite, September 2017: <https://www.ncbi.nlm.nih.gov/pubmed/28526478>

25. See the investigative report by The New York Times, "How Big Business Got Brazil Hooked on Junk Food," 16 September 2017: <https://www.nytimes.com/interactive/2017/09/16/health/brazil-obesity-nestle.html>

26. Fumiaki Imamura, Renata Micha, Shahab Khatibzadeh, Saman Fahimi, Peilin Shi, John Powles, Dariush Mozaffarian, "Dietary quality among men and women in 187 countries in 1990 and 2010: a systematic assessment", Lancet Glob Health 2015;3: e132-42: <https://www.thelancet.com/action/showPdf?pii=S2214-109X%2814%2970381-X>

“As a whole, dietary patterns in Africa rank healthier than those in North America, Europe and other parts of the world where supermarkets exercise high levels of control over retail food sales.”

across the continent, Africans are consuming more and more of these dangerous processed foods.

South Africa's experience with supermarkets is a cautionary tale for other African countries. Supermarkets began to expand in South Africa in the 1990s; today they control 50–60% of retail food sales, by far the highest figure of any African country. Researchers say this growth of supermarkets laid the foundations for a boom in the consumption of ultra-processed foods, like soft drinks and biscuits, that has taken place over the past few decades. The per capita consumption of packaged foods and soft drinks increased by over 50% over this period while a diet based on healthy foods, like fresh fruits and vegetables, has become unaffordable to the average South African.²⁷

There is evidence that supermarkets are already generating similar impacts as they expand to other parts of Africa. One recent study of consumers in Ghana found that a driving factor leading people to shop at supermarkets was the access to and affordability of processed foods, which is what supermarkets focus on selling. The author of the study warns that supermarkets are encouraging dietary shifts away from fresh fruits and vegetables to processed foods high in fats.²⁸ Similarly, researchers alarmed by the growing levels of obesity and type 2 diabetes in Kenya caused by the increased consumption of highly processed foods say the “supermarketisation” of the country's food systems is to blame.²⁹

27. Lisa-Claire Ronquest-Ross, Nick Vink, Gunnar O. Sigge, “Food consumption changes in South Africa since 1994,” *S Afr J Sci.* 2015;111(9/10), Art. #2014-0354: <http://dx.doi.org/10.17159/sajs.2015/20140354>

28. Alexandra Therien, “The Impact of the Rise of Supermarkets on Household Urban Food Security: A Case Study of Accra, Ghana”, Thesis presented to the University of Guelph, January 2017: https://atrium.lib.uoguelph.ca/xmlui/bitstream/handle/10214/10248/Therien_Alexandra_201702_MA.pdf?sequence=1

29. Kate Lyons, “Supermarkets are creating an obesity crisis in African countries, experts warn,” *Guardian*, 3 October 2017: https://www.theguardian.com/global-development/2017/oct/03/supermarkets-creating-obesity-crisis-african-countries-experts-warn-middle-class-malnutrition?CMP=tw_t_gu

Auchan's “food baskets”

The Auchan family “food baskets” (“Panier alimentaire” in French), promoted by Auchan at discount prices at its Atac stores in Senegal, are composed almost entirely of processed foods and dry goods supplied by multinationals and big Senegalese food companies. Its “Classique Simple” basket contains a bag of broken Royal Umbrella Thai rice (via the Charoen Pokphand Group of Thailand), a litre bottle of vegetable oil (via Groupe Avril of France), a 1-kilo box of sugar cubes (via the French-owned Groupe Mimran), a container of Nescafé (via Nestlé) and 2 bags of powdered milk (also via Nestlé). With the “Classique Plus” basket, customers get an additional packet of chocolate powder (via Cadbury Schweppes) and 60 Maggi bouillon cubes (via Nestlé), as well as a pot of chocolate spread by Patisen, a multinational food company based in Senegal, and a can of tomato paste from SOCAS, a French-Senegalese owned company that is the country's main tomato processor. The “Classique Plus” basket also contains one 5-kilo bag of onions, the only fresh vegetable in any of its food baskets.

See: <https://afrimarket.sn/auchan.html>

Open door for supermarkets, police repression for small vendors

The farmers, fisher people, pastoralists, farm workers, small vendors and processors that provide the continent with the vast majority of its food should be applauded. Despite all the hurdles that come with operating in a context of deep structural poverty, they supply Africans with some of the healthiest diets on the planet. The food systems that they have built and sustained are also the most important sources of employment and livelihoods on the continent, especially for women. This includes in urban areas. In Nairobi, for instance, the

leading income-generating activity for women in poor communities is selling fruit and vegetables.³⁰

Despite the critical role that people's food systems play in providing Africans with food and livelihoods, they are under constant attack by governments.

"So as I hurry on my way out of town, these Kampala Capital City Authority guys come from behind me one pushes me so hard I stagger a bit and unleash a mscheew [jeer]! Kumbé, [meanwhile] they are going after vendors. Upturned a jiko [charcoal stove] pouring charcoal and a few roast gonja [plantain], poured beans and peas here, upturned someone's sweets and mandazi, cheei, hawkers running helter skelter, really wreaking havoc, those bad men... I rushed ahead of them and begun warning every hawker within sight that the bad guys are coming for them. Wueh, you should have seen how those hawkers are prepared, they scattered within seconds with their goods safely packed away! And the smile on my face as I warned more and more! That was my duty to the nation!"

Posted to Facebook by Juliet Nabwire of Kampala, Uganda (2 March 2018)³¹

Across Africa, in cities like Kampala, Uganda, small vendors are facing growing persecution for selling foods on city streets and business districts. The Kampala officials say they are only trying to reduce "chaos and congestion" and they claim that they will provide traders with "alternative organised spaces" located outside the central areas. But the alternative spaces that are proposed charge high fees and are located too far from customers, leaving the traders little choice but to keep going back to the city centre where they face constant harassment from Kampala's police.³²

30. C. Skinner and G. Haysom, "The informal sector's role in food security: A missing link in policy debates? Working Paper 44. Cape Town: PLAAS, UWC and Centre of Excellence on Food Security, 2016: <http://www.plaas.org.za/sites/default/files/publications-pdf/WP44%20SkinnerHaysom.pdf>

31. Slightly modified from the original to make language understandable to an international audience.

32. Amos Ngwomoya, "Minister Kamya wants vendors off city streets in 2 months," Daliy Monitor, 2 October 2016: <http://www.monitor.co.ug/News/National/Minister-Kamya-wants-vendors-off-city-streets-months/688334-3401414-hlo74v/index.html>

Nairobi and Lagos have also enacted similar bans on "informal" vendors within main commercial areas and have tried to relegate city traders to alternative areas — Nairobi through a series of measures over the past 15 years and Lagos through a sudden total ban on street hawking imposed in 2016. Accra, for its part, launched a "decongestion exercise" this year to clear small traders off streets and pavements downtown.³³ Food vendors in these cities are thus in the same position of having to operate illegally, in constant danger of being targeted by the police.³⁴

Yet, while small food vendors in Africa have to navigate an increasing array of laws and regulations, there are few such obstacles hampering the growth of supermarkets on the continent.

Decades of structural adjustment programmes imposed by international development banks and foreign donors have left sub-Saharan African countries with fewer legal restrictions on foreign investment than any other region.³⁵ A recent study of 24 sub-Saharan African countries by the World Bank found that more than half had very few or no restrictions on foreign investment, including in retail.³⁶ The laws on local content and procurement that exist in other parts of the world are absent or not enforced in Africa. And there are few if any legal protections for local food companies that sell to powerful multinational retailers. In Uganda, for instance, when the two big Kenyan retailers Nakumatt and Uchumi collapsed in 2017 and 2018, they had more than \$180 million in debts; their small Ugandan suppliers found themselves with no legal redress to recover the amounts they were owed.³⁷

33. Nellie Peyton, "Ghana's market women score win against forced eviction," Reuters, 20 September 2018: <http://www.thisisplace.org/i/?id=560a9056-ea46-4a87-b4ca-d343dd47932c>

34. Hungry Cities, "The Urban Food System of Nairobi, Kenya," Report No. 6, 2017: <http://hungrycities.net/wp-content/uploads/2017/11/HC6.pdf>; Emmanuel Akinwotu, "From hawkers to criminals: how the Lagos ban on street selling hurts the city," Guardian 3 August 2016: <https://www.theguardian.com/cities/2016/aug/03/hawkers-criminals-lagos-ban-street-selling>

35. World Bank, "Investing Across Borders," 2010: <http://iab.worldbank.org/~media/FPDKM/IAB/Documents/Overview-IAB.pdf>

36. World Bank, "Starting a Foreign Investment Across Sectors," November 2013L <http://iab.worldbank.org/~media/FPDKM/IAB/Documents/FDI-Starting-a-Foreign-Investment.pdf>

37. "Allan Olingo, What next for troubled Uchumi and Nakumatt?", The East African, 22 September 2017: <http://www.theeast-african.co.ke/business/What-next-for-troubled-Uchumi-and-Nakumatt/2560-4107908-105g73z/index.html>



Kampala Capital City Authority workers forcibly removing a street vendor in the city centre on 25 October 2016, during a crackdown in which over 20 food vendors were arrested and had their property destroyed or confiscated. (Photo: Kenneth Kazibwe/ChimpReports)

In Senegal, where the national laws are completely ill-equipped to deal with the current aggressive expansion of European retailers, the country's Council of Ministers agreed to move forward with a decree to regulate supermarkets on August 1, 2018. But social movements are skeptical. The decree was developed behind closed doors a month prior, and in mid-September the government was still refusing to make the text of the decree public.³⁸

38. FRAPP, "Transformons « Auchan dégage », « Non au APE », « France dégage » en vote contre le système et Macky (communiqué)", 12 September 2018: https://www.impact.sn/Transformons-Auchan-degage--Non-au-APE--France-degage-en-vote-contre-le-systeme-et-Macky-communique_a10768.html

Senegal's social movements also point out that their government has recently signed an Economic Partnership Agreement (EPA) with the European Union that plays directly into the hands of European retailers. The agreement, involving several West African countries, forces Senegal to gradually remove all barriers to the entry of the cheap, subsidised European food products that dominate the shelves of European retailers.³⁹ Such EPAs with the EU are just one of many bilateral or

39. FRAPP, "Transformons « Auchan dégage », « Non au APE », « France dégage » en vote contre le système et Macky (communiqué)", 12 September 2018: https://www.impact.sn/Transformons-Auchan-degage--Non-au-APE--France-degage-en-vote-contre-le-systeme-et-Macky-communique_a10768.html

“While they may use their deep pockets to draw in customers with loss leaders, in the long run they are more expensive than open air markets and streetside stalls, making it more difficult for people to access healthy foods.”

multilateral trade liberalisation agreements or regional trade deals bearing down on African countries, forcing them to open their borders to food imports and making it easier for supermarket chains to expand their supply chains into new territories.

The creation of the Southern African Development Community (SADC) Free Trade Area in 2008, for instance, enabled the South African supermarket giant Shoprite to expand out of its home market. It now has 308 grocery stores on the continent outside of South Africa, 90 per cent of which are in SADC countries.⁴⁰ In 2009, the first year the SADC trade area came into effect, SADC preferences saved Shoprite an estimated US\$12 million on shipments of South African products to its stores in other SADC countries.⁴¹

40. Shoprite Business Overview: https://www.shopriteholdings.co.za/content/dam/MediaPortal/LatestIntegrateReport/IR2017/3_5932_Shoprite_IR_2017E_Distribution_Of_Operations_%26_The_Group.pdf. See also GRAIN, “Colonialism’s new clothes: The EU’s Economic Partnership Agreements with Africa,” 21 August 2017: <https://www.grain.org/article/entries/5777-colonialism-s-new-clothes-the-eu-s-economic-partnership-agreements-with-africa>

41. Nick Charalambides, “What Shoprite and Woolworths can teach us about Non Tariff Barriers in Southern and Eastern Africa,” South African Institute of International Affairs, October 2013: https://www.researchgate.net/publication/272151268_What_Shoprite_and_Woolworths_can_teach_us_about_Non_Tariff_Barriers_in_Southern_and_Eastern_Africa

Supermarkets out!

It would be dangerous to assume that the current low rate of penetration by supermarkets into African food systems means that they are uninterested in expanding into the continent, or that they are content to only serve the 10% of African consumers able to shop for luxury imports at glitzy shopping malls. Some of the major supermarket chains, and the multinational food companies that supply them, are increasingly targeting Africa’s large urban poor populations for growth, as is evident with Auchan in Senegal.

Laurent Leclerc, Auchan’s Senegal director, is convinced that multinational supermarkets like his will soon take over from small vendors in supplying the bulk of Africa’s food supply. Africa’s small vendors, he says, “will still occupy a place providing convenience services to customers who step out of their homes to get a product that they forgot to buy for the meal they are preparing that evening, or for a container of gas.”⁴² But supermarkets will, in his view, soon be in control of organising food retail across the continent.

It is important for Africans to realise that their food systems are at risk. When supermarkets expand into new countries, they destroy local food systems, driving small vendors and food processors out of business and severing the linkages small farmers, pastoralists and fisher people have developed with urban markets. They undermine local food cultures, encouraging a shift from traditional foods made with whole ingredients to empty-calorie, highly processed foods. And while they may use their deep pockets to draw in customers with loss leaders, in the long run they are more expensive than open air markets and streetside stalls, making it more difficult for people to access healthy foods.

This is what supermarket promoters call “development” and the “modernisation” of food systems. They insist that they are merely using the free market to help people cope with the high costs of living.⁴³ But the reality is that African governments have a choice. They can allow the big global supermarket chains to make use of their political, legal and economic advantages to take over local food systems, or they can implement some

42. ‘Laurent Leclerc, Directeur d’Auchan Senegal “ On dérange les commerçants mais...” Senpresse, 15 July 2018: <http://senpresse.com/societe/103-societe/2769-laurent-leclerc-directeur-d-auchan-senegal-on-derange-les-commerçants-mais>

43. Kamagaté Issouf, “Lutte contre la cherté de la vie : Des supermarchés dans la mouvance,” Fratmat, 4 November 2016: <https://www.fratmat.info/index.php/economie/item/35251-lutte-contre-la-cherte-de-la-vie-des-supermarchés-dans-la-mouvance>



Sit in organised in July 2018 by the “Auchan dégage!” collective in Dakar, Senegal. Photo: Dave Design.

simple measures to protect local food systems and enable them to thrive.

One place to start is with tariffs that protect local farmers and processors from the dumping of subsidised, low-quality food imports. Take dairy for instance. With the end of the EU quota regime for dairy and with dairy consumption slumping across much of Europe, European dairy companies are unloading their excess production in Africa, mainly in the form of powdered milk that they then reconstitute with vegetable fats.⁴⁴ European powdered milk exports to Africa have tripled since 2009, with devastating impacts on local producers.

“There is outright dumping of European milk on the African market,” complains Adama Diallo, the president of the National Union of Small Dairies and Local Milk Producers of Burkina Faso (UMPL-B).⁴⁵

44. “Cécile Barbière, “Au Sénégal, la production laitière cherche sa voie,” EURACTIV, 27 September 2018: <https://www.bilaterals.org/?au-senegal-la-production-laitiere&lang=en>

45. Cécile Barbière, “Comment l’UE exporte sa crise du lait vers l’Afrique,” EURACTIV, 1 March 2018: <https://www.euractiv.fr/section/agriculture-alimentation/news/comment-lue-exporte-sa-crise-du-lait-vers-lafrique/>

The situation is particularly dire for local dairy producers in West Africa, where members of the Economic Community of West African States (ECOWAS) have an agreement with Europe to keep tariffs on milk powder imports to no more than 5%. The situation will worsen once the EPA signed by these governments with the EU comes into effect and the duties are reduced to zero.

As the Kenyan experience has shown, strong tariffs are necessary to protect African dairy producers and vendors from powdered milk dumping. With such tariffs, local production can thrive, providing urban consumers with a safe, nutritious, and much higher-quality than the processed dairy products being pushed by multinational companies in Africa.⁴⁶ The same is true with other food items such as meats and grains. The case of poultry in Côte d’Ivoire is another clear example of where tariffs have been decisive in supporting local production and supply.⁴⁷

46. GRAIN, “The great milk robbery,” 7 December 2011, <https://www.grain.org/article/entries/4426-the-great-milk-robbery>

47. See “Poulet ivoirien : la filière se remplume,” France Info, 1 May 2018: https://www.francetvinfo.fr/sante/alimentation/poulet-ivoirien-la-filiere-se-remplume_2732591.html



A shopping mall in Kampala, 2018. Multinational supermarkets tend to open in shopping malls in Africa alongside multinational fast food restaurants like KFC.

African governments must also stop harassing the so-called “informal” sector. These vendors, who are mostly women, need to be respected and supported for the work they are doing in supplying people with quality food and ensuring the livelihoods of African small farmers. It is encouraging to see that women vendors in some cities are organising to fight against government repression. In June 2018, 2000 women street vendors in Madina, a suburb of Accra, refused to comply with an eviction order, saying they would not leave the space they were occupying until the city council provided them with a new, safer working space accessible to their customers. After months of campaigning, the city council finally agreed to provide them with a new space, complete with toilets, streetlights, storage, a market office, a security post and a daycare centre.⁴⁸

Africans are going to have to push their governments in this direction. The *Auchan dégage* movement in Senegal is an inspiring example of how small vendors, farmers and urban consumers can come together to defend local food systems and oppose the expansion of supermarkets and multinational food companies. As we see there, such campaigns must involve direct actions targeting supermarkets and supporting local foods, but also connections with larger movements against the EPAs and other structural forces that perpetuate Africa’s colonial domination.

48. Photo available here: <http://www.thisisplace.org/i/?id=560a9056-ea46-4a87-b4ca-d343dd47932c>



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GRAIN

Girona 25 pral., 08010 Barcelona, Spain

Tel: +34 93 301 1381, Fax: +34 93 301 16 27

Email: grain@grain.org

www.grain.org