

PROMOVE Comércio

Mozambique

Export Market Analysis

Webinar

30. November 2021

Wolfgang Wiegel

United Nations Industrial Development Organization (UNIDO)



The Export Market Analysis:

- Which target market ?
- Which segmentation ?
- Which channel ?
- Which products ?
- Which client value ?

**Your products
are demanded in
EU markets**

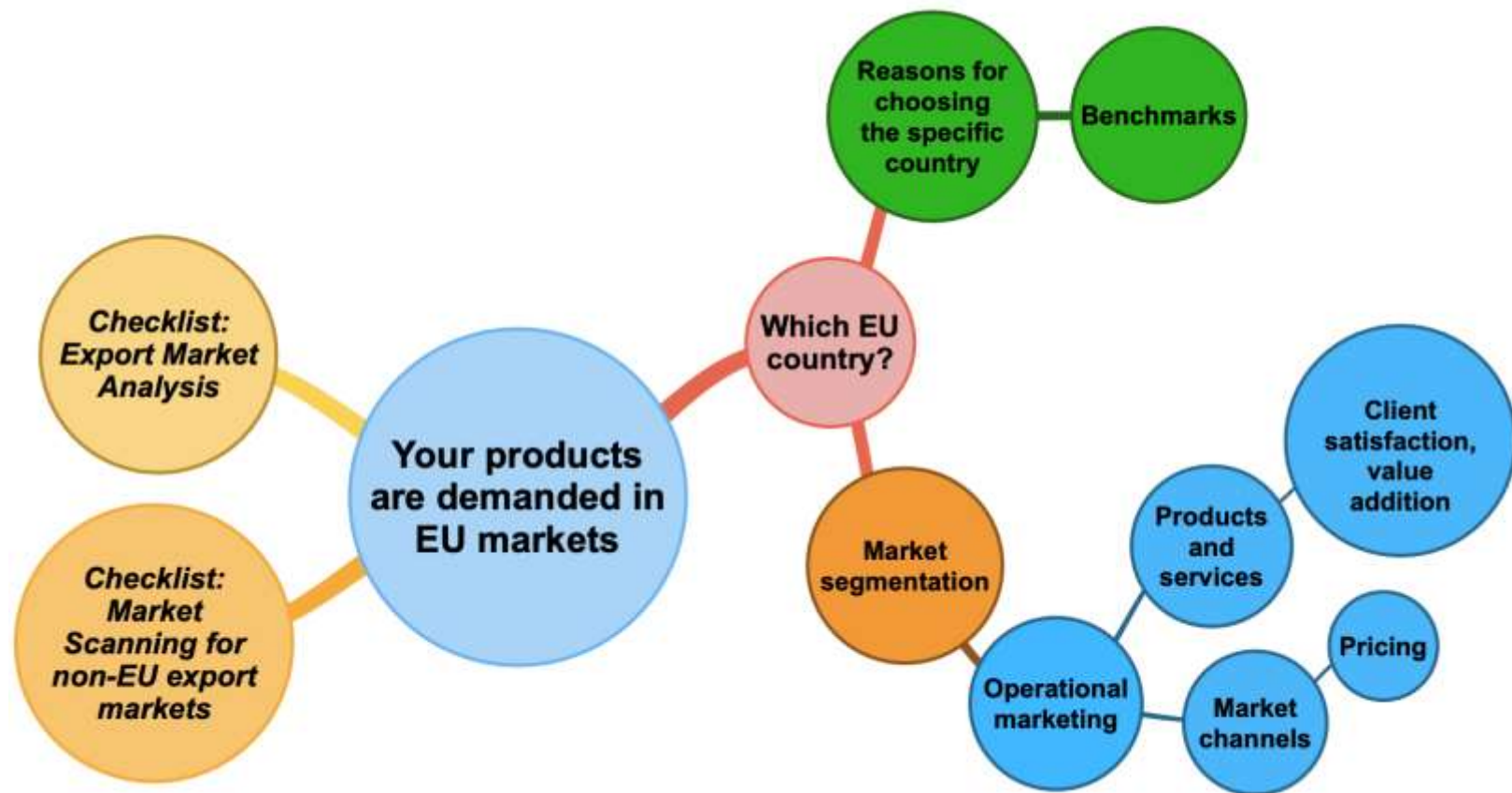
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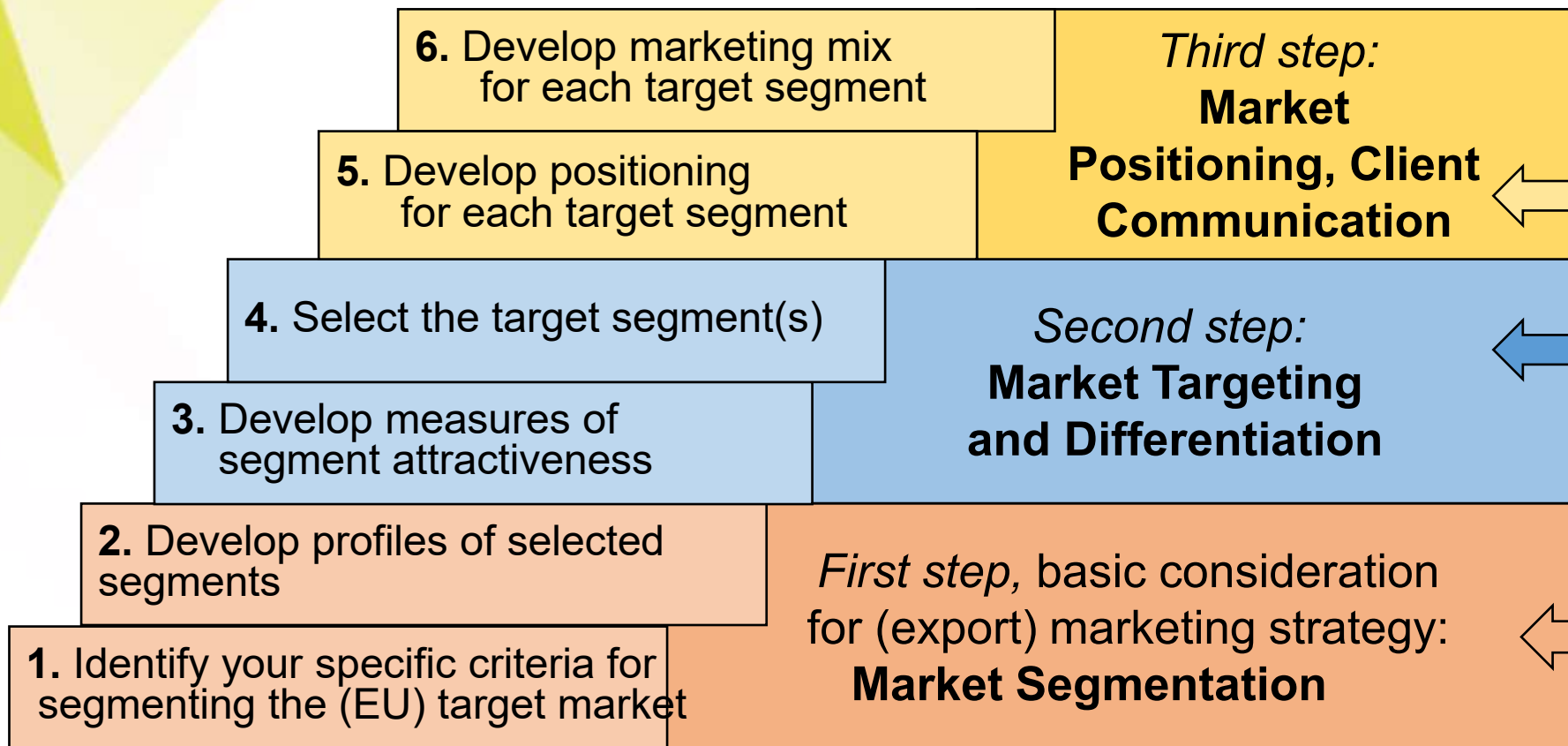


The Export Market Analysis:

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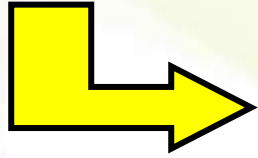


Information – Strategy – Operationalization

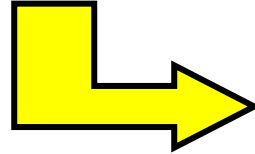


From Screening to Monitoring

MARKET SCREENING



MARKET RESEARCH



MARKET MONITORING

Who is responsible in your company?

- (Export) Marketing department and trained marketeers in your company
- Contracted external market research consultants (national or international)

Many resources available:

- Regular market feedback from importers and trade partners, sales staff
- Internet research and export help websites
- Regular market presence and trade fairs
- Sector institutions, BDS services and networking platforms,
- International chambers or importers' sites, B2B sales platforms

Market Screening and Scanning

General framework conditions	Export marketing conditions	Product requirements	Cost – Benefit optimization
<ul style="list-style-type: none"> <input type="checkbox"/> <i>Political conditions, trade policy and agreements</i> <input type="checkbox"/> <i>Legal (import) restrictions</i> <input type="checkbox"/> <i>Country credit worthiness, /country rating</i> <input type="checkbox"/> <i>Monetary risks or other hindrances</i> <input type="checkbox"/> <i>Tariff and non-tariff barriers</i> 	<ul style="list-style-type: none"> <input type="checkbox"/> <i>Price and quality level of national industry</i> <input type="checkbox"/> <i>Competitive situation</i> <input type="checkbox"/> <i>Sales options</i> <input type="checkbox"/> <i>Market potential</i> <input type="checkbox"/> <i>Market development</i> <input type="checkbox"/> <i>Transport costs</i> 	<ul style="list-style-type: none"> <input type="checkbox"/> <i>Legal requirements</i> <input type="checkbox"/> <i>Safety / Health</i> <input type="checkbox"/> <i>Warranties</i> <input type="checkbox"/> <i>Packaging</i> <input type="checkbox"/> <i>Labeling</i> <input type="checkbox"/> <i>Product safety</i> 	<ul style="list-style-type: none"> <input type="checkbox"/> <i>Best fit for export product</i> <input type="checkbox"/> <i>Easy access (language, culture)</i> <input type="checkbox"/> <i>Best comparable prices</i> <input type="checkbox"/> <i>Best comparable margins</i> <input type="checkbox"/> <i>Best suitable channels</i> <input type="checkbox"/> <i>Best cost/benefit ratio</i>

Selection process

–

facing out countries

–

focusing

Screen and Research of Market Macro Data



COLLECT DATA *Market scan* *Market research and analysis*

- Macro trade data and statistics
- Overall market trends (EU 27, other European countries)
- Market briefs with specific focus (healthy food trends, organic foods)

→ [EUR-Lex, Summary of EU legislation on food safety](https://eur-lex.europa.eu/summary/chapter/3010.html)

<https://eur-lex.europa.eu/summary/chapter/3010.html>

→ [EU agricultural market briefs, organic products](https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/agri-market-brief-18-organic-imports_en.pdf)

https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/agri-market-brief-18-organic-imports_en.pdf

→ [EU information website on EU agri-food markets](https://agridata.ec.europa.eu/extensions/DataPortal/trade.html)

<https://agridata.ec.europa.eu/extensions/DataPortal/trade.html>

→ [EPA SADC agri-food trade statistics](https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/agrifood-epa-sadc_en.pdf)

https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/agrifood-epa-sadc_en.pdf

→ [EU policy EPA and SADC](https://ec.europa.eu/trade/policy/countries-and-regions/regions/sadc/)

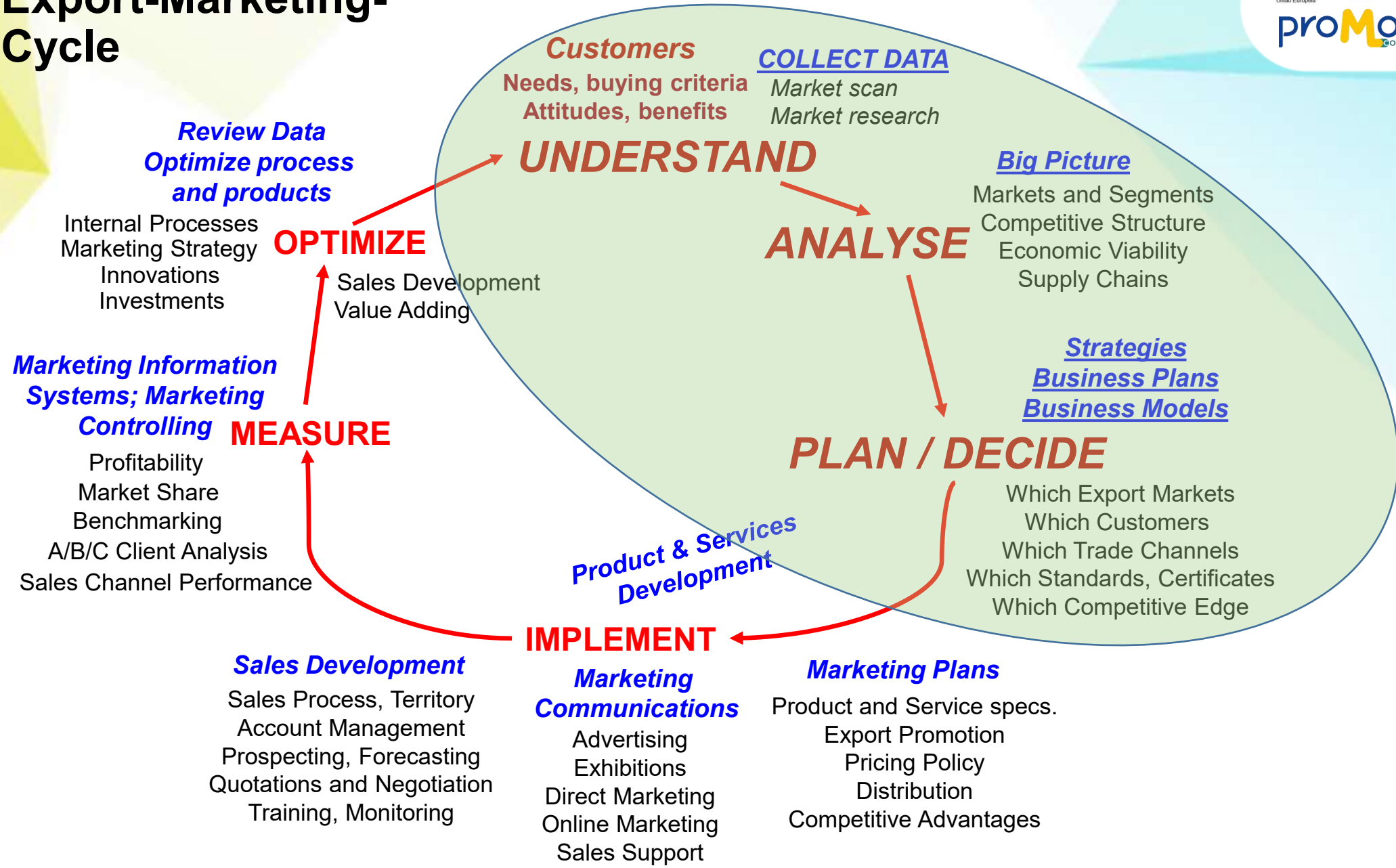
<https://ec.europa.eu/trade/policy/countries-and-regions/regions/sadc/>

→ [Eurostat – multiple EU statistics](https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Africa-EU_-_international_trade_in_goods_statistics)

https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Africa-EU_-_international_trade_in_goods_statistics

Many “macro data”
resources available
for free use
(some examples)

Export-Marketing-Cycle



Market Research – some Key Aspects



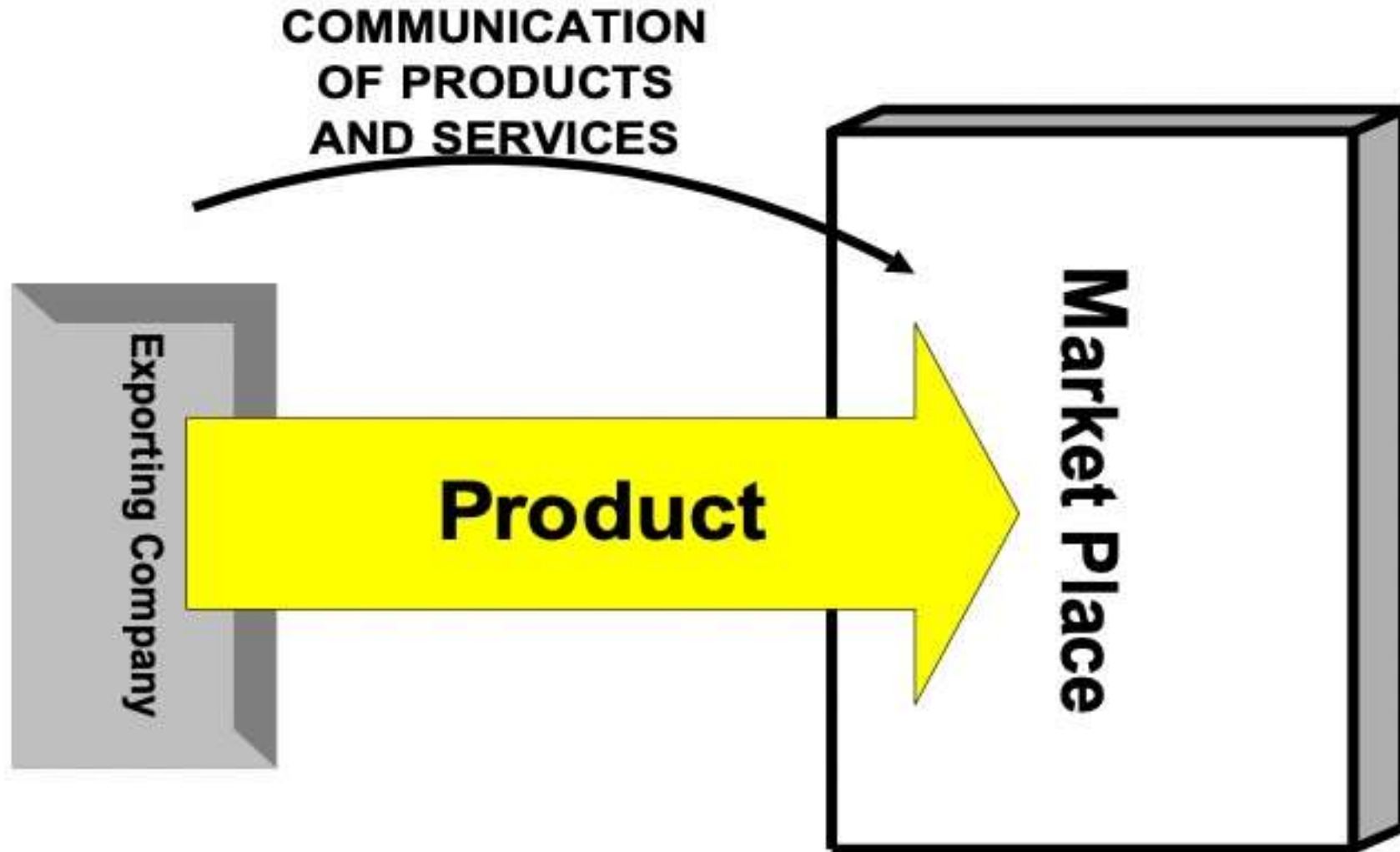
Systematic gathering of market information, its proper analysis and utilization of analysis data is key for defining a successful export marketing strategy.

It is a management responsibility to invest time, efforts and resources for finding and analysing suitable information from potential target markets.

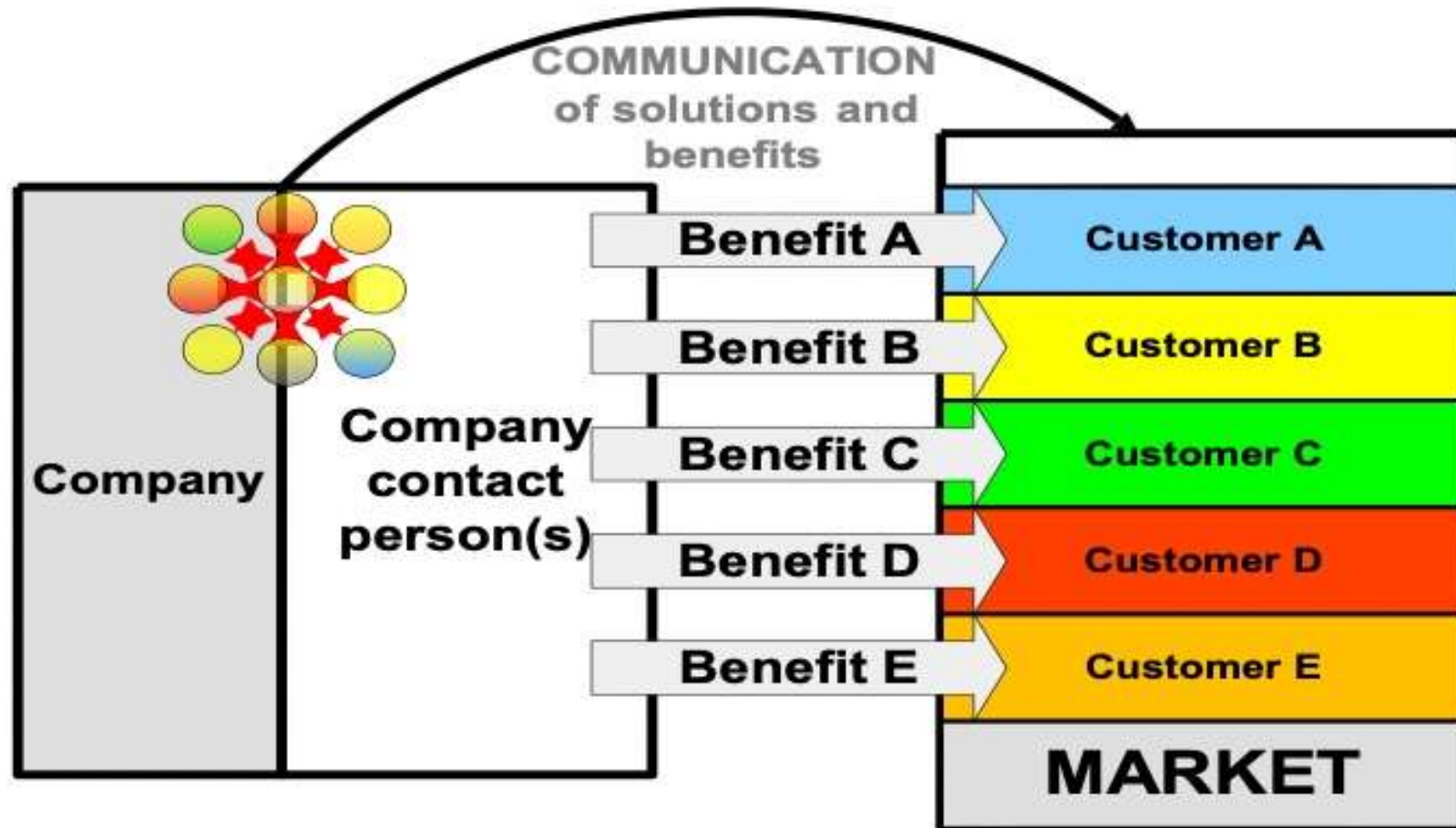
For taking informed decisions, management must have as much as possible input on market realities. A broad range of information from different sources is useful.

Decision-taking that is based on broad export market information will have impact to business results in terms of export performance, terms of sales, profitability.

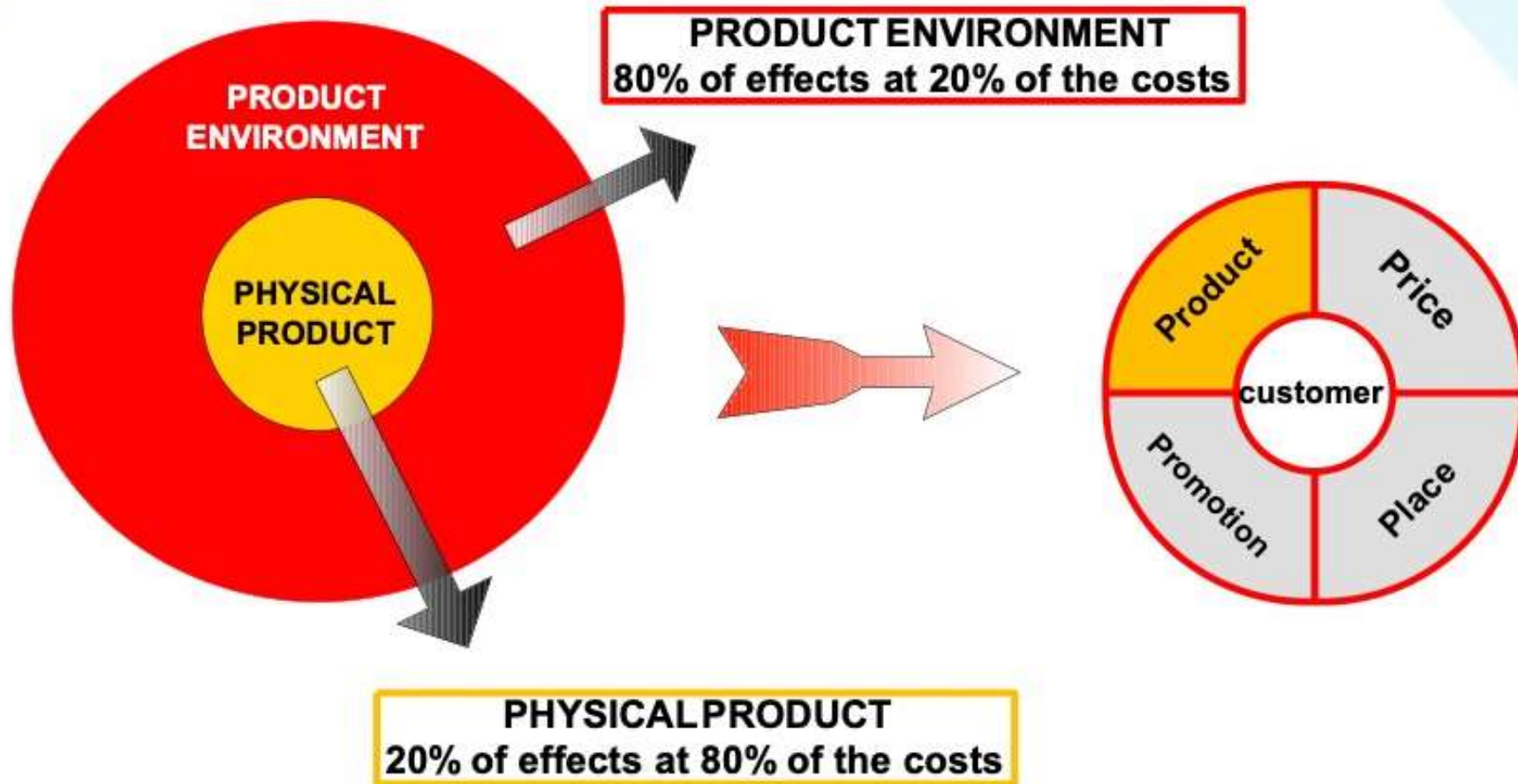
The Old Paradigm



The New Paradigm – Customer oriented Approach



Combination of Product – Product Environment – Services



Export Market Analysis

Market Profile	- Market characteristics for the products growth rates, structural changes, potential market/product segments, alternative trends at markets, Consumer trends, price segments
Competitive Profile	- Distribution methods competitors' landscape, competitive strength of main competitors, own competitive edge
Distribution Profile	- Current distribution channels and methods Optional or alternative distribution channels, Structural limitations and best fit for exporter, differentiating channel costs, Export clients' supply chain requirements, B2B contacts, trade fairs
Export country regulations	- Product related in addition: transport related, Storage related, packaging and labelling related, food safety regulations and traceability issues, quality and certification related

Market Research and Information Tools

Overview of selected primary information sources for export to the EU



The screenshot shows the ITC website with the following elements:

- Navigation menu: HOME, ABOUT ITC, GLOBAL GOALS, PROJECTS, SECTORS, MARKET INFO & TOOLS, PUBLICATIONS, EVENTS, NEWS, COUNTRIES / TERRITORIES
- Search bar: Search
- Dropdown menu for 'Market analysis tools': Market analysis tools, Market information, ITC library, E-learning
- Main content: 'About ITC' section with a video player and text describing the ITC's mission and goals.
- RECENT VIDEOS section with three video thumbnails:
 - Commercial diplomacy: Secrets of success for business growth abroad
 - Identify investment-ready small firms: SMECO 2019
 - Women Shaping Global Economic Governance: Aid for Trade 2019
- Sidebar: 'ABOUT ITC' links including How ITC works, Areas of work, Geographic focus, Working with ITC, ITC's 50th anniversary, Corporate documents, ITC Funding, and Reproducing ITC content.

MARKET INFO & TOOLS PUBLICATIONS

- Market analysis tools
- Market information
- ITC library
- E-learning

<https://www.intracen.org/itc/about/>

<https://www.trademap.org/Index.aspx>

Market Research and Information Tools

Overview of selected primary information sources for export to the EU



Home Market information Projects News Events About CBI

CBI celebrates 50 years

CBI is the Centre for the Promotion of Imports from developing countries

CBI supports the transition towards inclusive and sustainable economies. We help small and medium-sized enterprises (SMEs) strengthen their economic, social and environmental sustainability. We do this by helping them export products and services to Europe and regional markets.

- Export to Europe**
Do you want to export your product to Europe? We can help you with training and coaching.
[Learn more](#)
- Market information**
Read our market studies for information that helps you export to Europe.
[Learn more](#)
- Import opportunities**
Information and assistance for European importers who want to find opportunities in developing countries.
[Learn more](#)
- Collaborate with us**
Information for business support organisations and experts that want to work with CBI.
[Learn more](#)

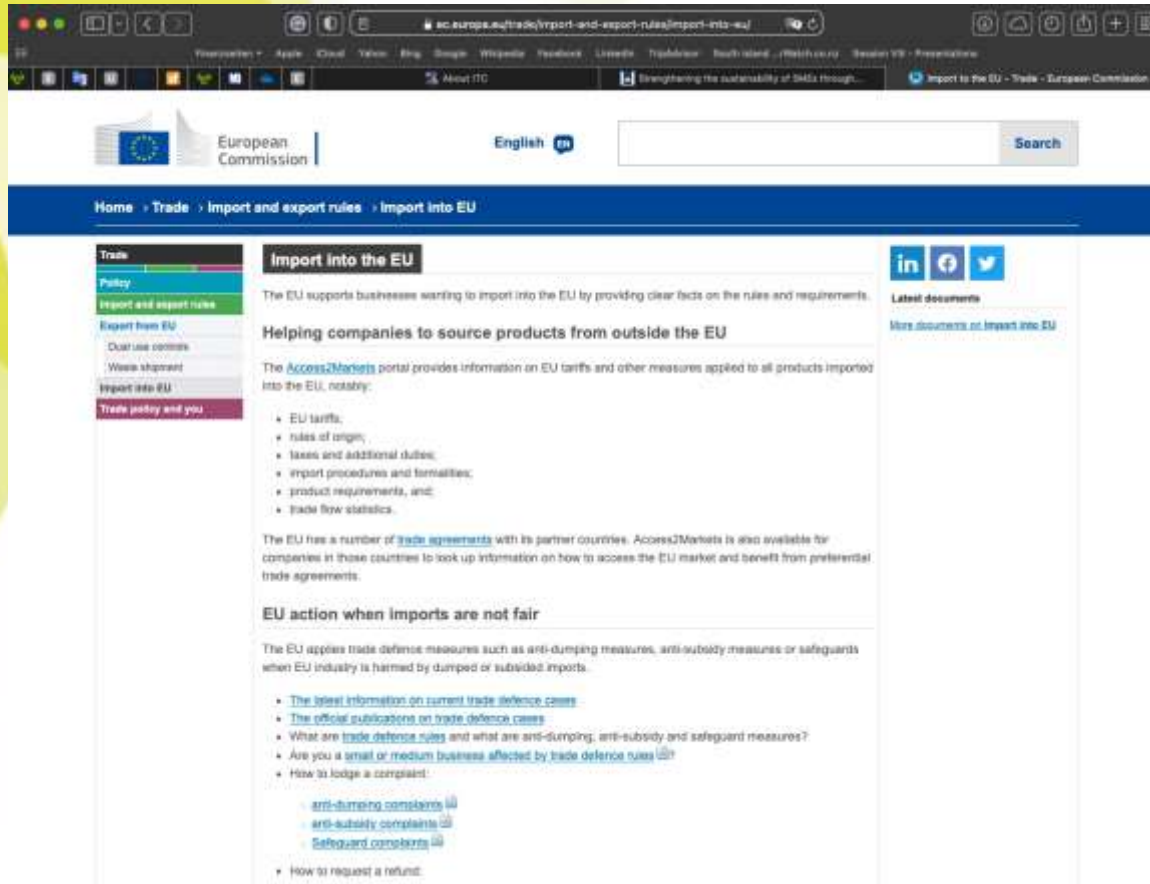
Market information

Do you want to export your product to Europe? Doing market research is the first step. To help you, we have done research on important questions about the European market. Per sector and product group, you will find important market information. Enter the European market with confidence.

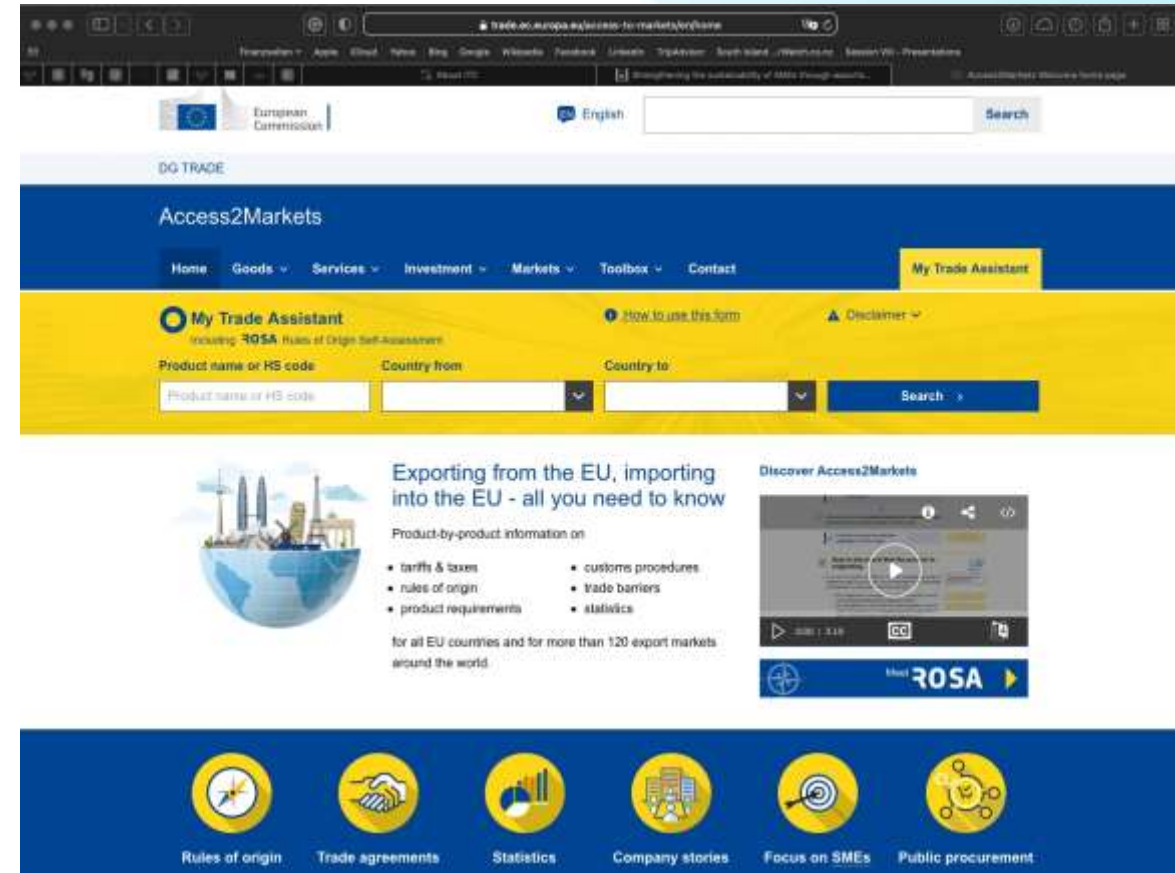
- Grains, Pulses and Oilseeds
- Processed Fruit and Vegetables and Edible Nuts
- Natural Ingredients for Cosmetics
- Coffee
- Spices and Herbs
- Apparel
- Tourism
- Fish and Seafood
- Natural Food Additives
- Natural Ingredients for Health Products
- Cocoa and Cocoa Products
- Fresh Fruit and Vegetables
- Home Decoration and Home Textiles
- Outsourcing (ITO/BPO)

Market Research and Information Tools

Overview of selected primary information sources for export to the EU



The screenshot shows the 'Import into the EU' page on the European Commission's trade website. The page is titled 'Import into the EU' and provides information on the rules and requirements for importing goods into the EU. It includes a search bar, a navigation menu, and a main content area with sections like 'Helping companies to source products from outside the EU' and 'EU action when imports are not fair'. There are also social media links and a 'Latest documents' section.



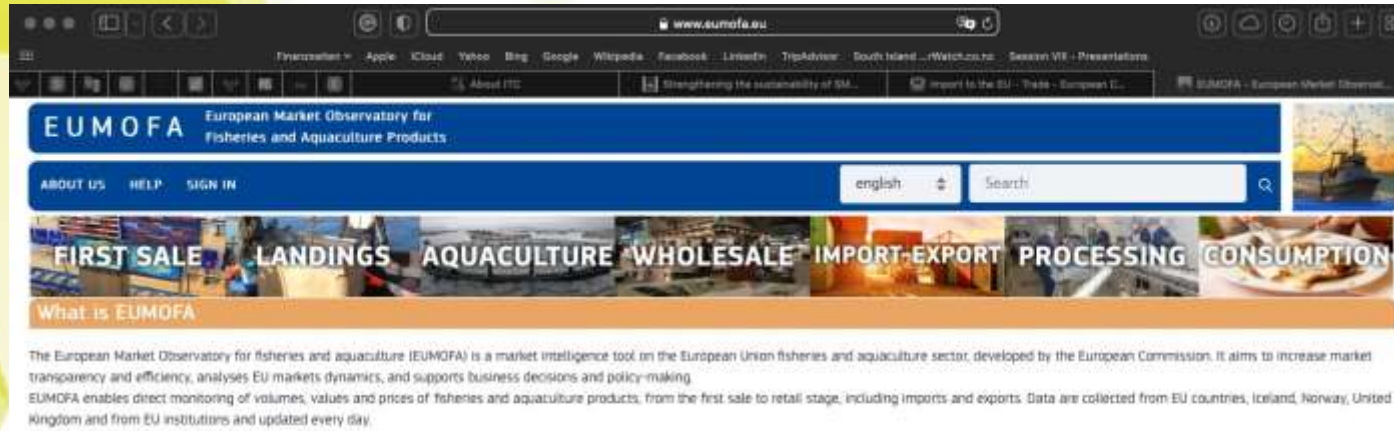
The screenshot shows the 'Access2Markets' portal on the trade.ec.europa.eu website. The page is titled 'Access2Markets' and provides information on EU tariffs and other measures applied to all products imported into the EU. It includes a search bar, a navigation menu, and a main content area with sections like 'My Trade Assistant' and 'Exporting from the EU, importing into the EU - all you need to know'. There are also social media links and a 'Latest documents' section.

<https://ec.europa.eu/trade/import-and-export-rules/import-into-eu/>

<https://trade.ec.europa.eu/access-to-markets/en/home>

Market Analysis and Information Tools

information sources for Fishery and Aquaculture Products in the EU



EUMOFA European Market Observatory for Fisheries and Aquaculture Products

ABOUT US HELP SIGN IN

english Search

FIRST SALE LANDINGS AQUACULTURE WHOLESALE IMPORT-EXPORT PROCESSING CONSUMPTION

What is EUMOFA

The European Market Observatory for fisheries and aquaculture (EUMOFA) is a market intelligence tool on the European Union fisheries and aquaculture sector, developed by the European Commission. It aims to increase market transparency and efficiency, analyses EU markets dynamics, and supports business decisions and policy-making. EUMOFA enables direct monitoring of volumes, values and prices of fisheries and aquaculture products, from the first sale to retail stage, including imports and exports. Data are collected from EU countries, Iceland, Norway, United Kingdom and from EU institutions and updated every day.



EUMOFA Observatório Europeu do Mercado dos produtos da pesca da aquicultura

SOBRE NÓS AJUDA NOVA E NOTÍCIAS

português

Visão geral do Mercado da UE

Market overview of the EU

Market overview of the EU

Perfis dos países

Perfis das espécies

Links úteis

Visão geral do Mercado da UE

Esta secção facilita informações e análises essenciais de toda a indústria europeia da pesca e da aquicultura, a nível da UE e dos Estados Membros, apresentadas através de "perfis" especializados. Também se pode obter uma lista de links úteis.

Clique nos botões à esquerda para mais informações.

EUMOFA's monitoring reports on the impacts of the COVID-19 crisis can be accessed [here](#). Starting from November, regular updates are no longer released bi-weekly, but are included in EUMOFA's Monthly Highlights.



Menu

- The EU market overview
- Data
- Studies and reports

Leave your feedback

Did you find what you were looking for?

Latest data updates

First sale Import Retail

Weekly prices

	Week 44-2021	Week 45-2021	% variation
Atlantic cod, gutted, size 1 in Thyborøn (Denmark)	€Kq	€Kq	
European hake, gutted, size 2 in Lorient (France)	3,88	3,29	-15,2%
Atlantic herring, whole, size 7a in Ventspils (Latvia)	0,29	0,28	-4,4%
Common octopus, whole in Matosinhos (Portugal)	8,78	7,75	-11,7%
Lemon sole, gutted, size 2 in Ginsted (United Kingdom)			

Latest publications

- The EU Fish Market Monthly Highlights: Portion trout in the 2021 N. 09-2021 EU
- Subscribe to the mailing list

News

- EUMOFA News Digest n.11 / 2021
- 'The EU Fish Market' 2021 edition is now online
- EUMOFA News Digest n.10 / 2021
- All news

<https://www.eumofa.eu/pt/the-eu-market>

EU Market Research Examples from Primary Sources

Many market information service links are free-of-charge



→ [ITC trade map, trade statistics for international business development](https://exportpotential.intracen.org/en/)

<https://exportpotential.intracen.org/en/>

→ [ITC Export potential for agri-food products from Mozambique](https://exportpotential.intracen.org/en/products/tree-map?fromMarker=i&exporter=508&toMarker=w&market=w&whatMarker=k)

<https://exportpotential.intracen.org/en/products/tree-map?fromMarker=i&exporter=508&toMarker=w&market=w&whatMarker=k>



→ [EU export trade Information by CBI Netherlands](#)



→ [CBI example on market Information Moringa products](https://www.cbi.eu/market-information/natural-ingredients-health-products/moringa)

<https://www.cbi.eu/market-information/natural-ingredients-health-products/moringa>

Market Visits, Trade Fairs

Direct research and visit to markets and trade fairs
(selection below)

→ **BIOFACH**, Germany
<https://www.biofach.de>



1,442 international exhibitors
15.-18.02.2022

→ **Grüne Woche**, Germany
<https://www.gruenewoche.de/en/>



International
Green Week Berlin
21–30 January 2022

1,800 international exhibitors

→ **ANUGA**, Germany
<https://www.anuga.de/>



7,972 international exhibitors
07.-11.10.2023

→ **Foodexpo**, Greece
<https://foodexpo.gr/en/>



1,350 international exhibitors

Market Visits, Trade Fairs

Direct research and visit to markets and trade fairs

→ **TUTTOFOOD**, Italy
<https://www.tuttofood.it>



1.072 international exhibitors
08.-11.05.2023

→ **SIAL**, France
<https://www.sialparis.com>



Biennial, 15.-19.10.2024
Exhibitors/visitors from over 200 countries

Market Visits, Trade Fairs



Links for EU-wide food product trade fairs

Published by:



<https://www.jetro.go.jp/en/database/j-messe/industry/agriculture/002/europe/>

**Food Processing Industries
Trade Shows in Europe
2021 - 2022**

https://www.eventseye.com/fairs/zst1_trade-shows_europe_food-processing-industries.html

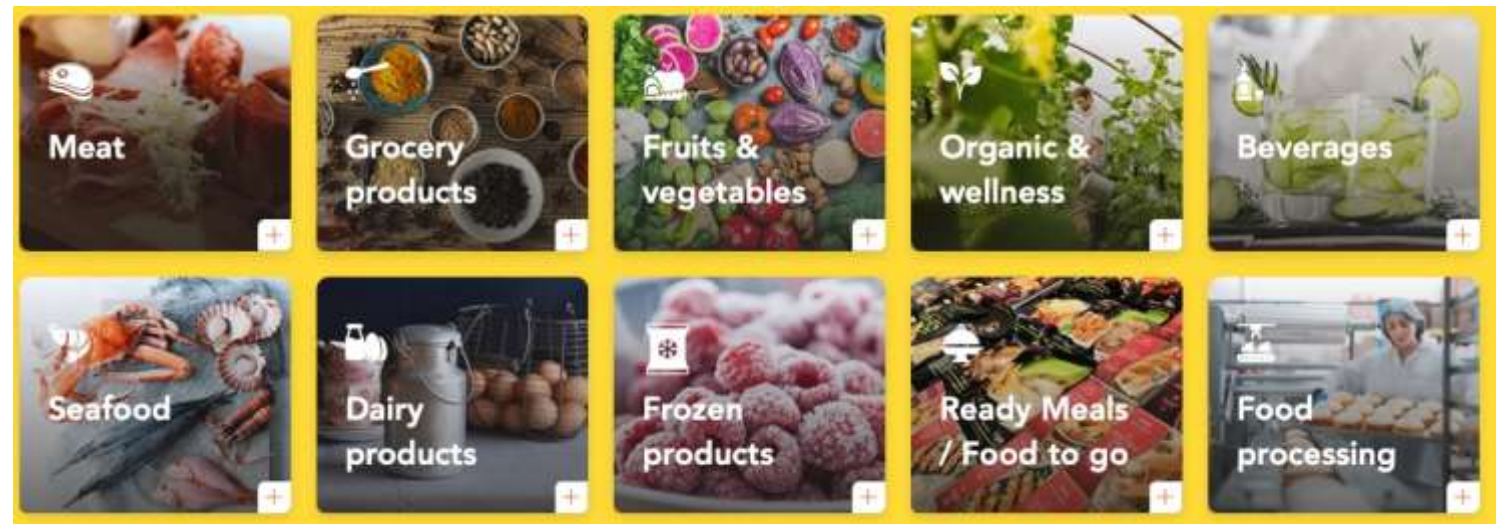
Researching Food Sector Trends

Current 7 Food Trends according to ANUGA

ANUGA is one the leading trade fairs in the EU concerning product innovations, new potentials, food trends

Alternative Meat Proteins	Free from & Health Foods	Sustainably produced or Packaged
Clean Label	Plant-Based Proteins or Foods	
Convenience & Snacking	SuperFoods & ancient Grains	

SIAL considers typical key sectors in the global food industry



EU Market Research and Analysis – Example NUTS and GRAINS



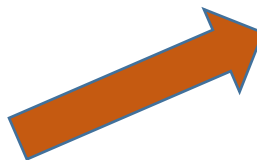
TRADE MAP

Trade statistics for international business development
Monthly, quarterly and yearly trade data. Import & export values, volumes, growth rates, market shares, etc.

Define your export product according to the HS code

The **ITC Trade Map** covers 220 countries and territories and 5300 products of the Harmonized System (HS)

<https://www.trademap.org/>



0801 - Coconuts, Brazil nuts and cashew nuts, fresh or dried, whether or not shelled or
080121 - Fresh or dried brazil nuts, in shell
080122 - Fresh or dried brazil nuts, shelled
080131 - Fresh or dried cashew nuts, in shell
080132 - Fresh or dried cashew nuts, shelled
0802 - Other nuts, fresh or dried, whether or not shelled or peeled (excluding coconuts,
080260 - Macadamia nuts, fresh or dried, whether or not shelled or peeled
080261 - Fresh or dried macadamia nuts, in shell
080262 - Fresh or dried macadamia nuts, shelled
080270 - Fresh or dried kola nuts "Cola spp.", whether or not shelled or peeled
080280 - Fresh or dried areca nuts, whether or not shelled or peeled



Aiesto

Selection

Cashewkerne
naturbelassen



Von Natur aus:

- Protein-Quelle
- Magnesium-Quelle
- Reich an ungesättigten Fettsäuren



Nährwerte

	ø/100 g	ø/Portion 30 g	% RI
Energie	2488 kJ/600 kcal	747 kJ/180 kcal	9 %
Fett	47,6 g	14,3 g	20 %
davon gesättigte Fettsäuren	9,0 g	2,7 g	14 %
davon einfach ungesättigte Fettsäuren	29,7 g	8,9 g	
davon mehrfach ungesättigte Fettsäuren	8,9 g	2,7 g	
Kohlenhydrate	19,8 g	5,9 g	2 %
davon Zucker	6,5 g	2,0 g	2 %
Ballaststoffe	5,2 g	1,6 g	
Eiweiß	20,5 g	6,2 g	12 %
Salz	0,02 g	0,01 g	<1 %

RI (reference intake) = Referenzmenge für einen durchschnittlichen Erwachsenen (8400 kJ/2000 kcal)

Mineralstoffe	ø/100 g	% NRV
Magnesium	260 mg	69 %

NRV (nutrient reference values) = Nährstoffbezugswerte

Inhalt ergibt ca. 6,5 Portionen à 30 g.
Die Analysenwerte unterliegen den bei Naturprodukten üblichen Schwankungen.

*GfK Consumer Panel FMCG, Bruttostichprobe 30.000 Haushalte (HH), Okt. 19-Sep. 20, Meistverk. (Absatz in Tonnen) in Nüsse/Kerne/Studentenfutter (n=26.434 Käufer-HH). Fortlaufend, elektronische Erfassung privaten Konsums. Repräsentiert durch Gewichtung und Hochrechn. alle HH Deutschlands (Haush.-Führung ab 16 J.).

200 g e



Vor Wärme schützen und trocken lagern.
Ungeöffnet mindestens haltbar bis:

12.07.2022
L1 258C1306 09:23

Solent GmbH & Co. KG,
David-Hanseman-Strasse 1-25,
D-52531 Übach-Palenberg

Das Verpackungsmaterial dieses Produktes wurde seit 2018 um 18% reduziert.

RICHTIG ENTSORGEN

Beutel

LDPE/OPP/PET Verbundstoff

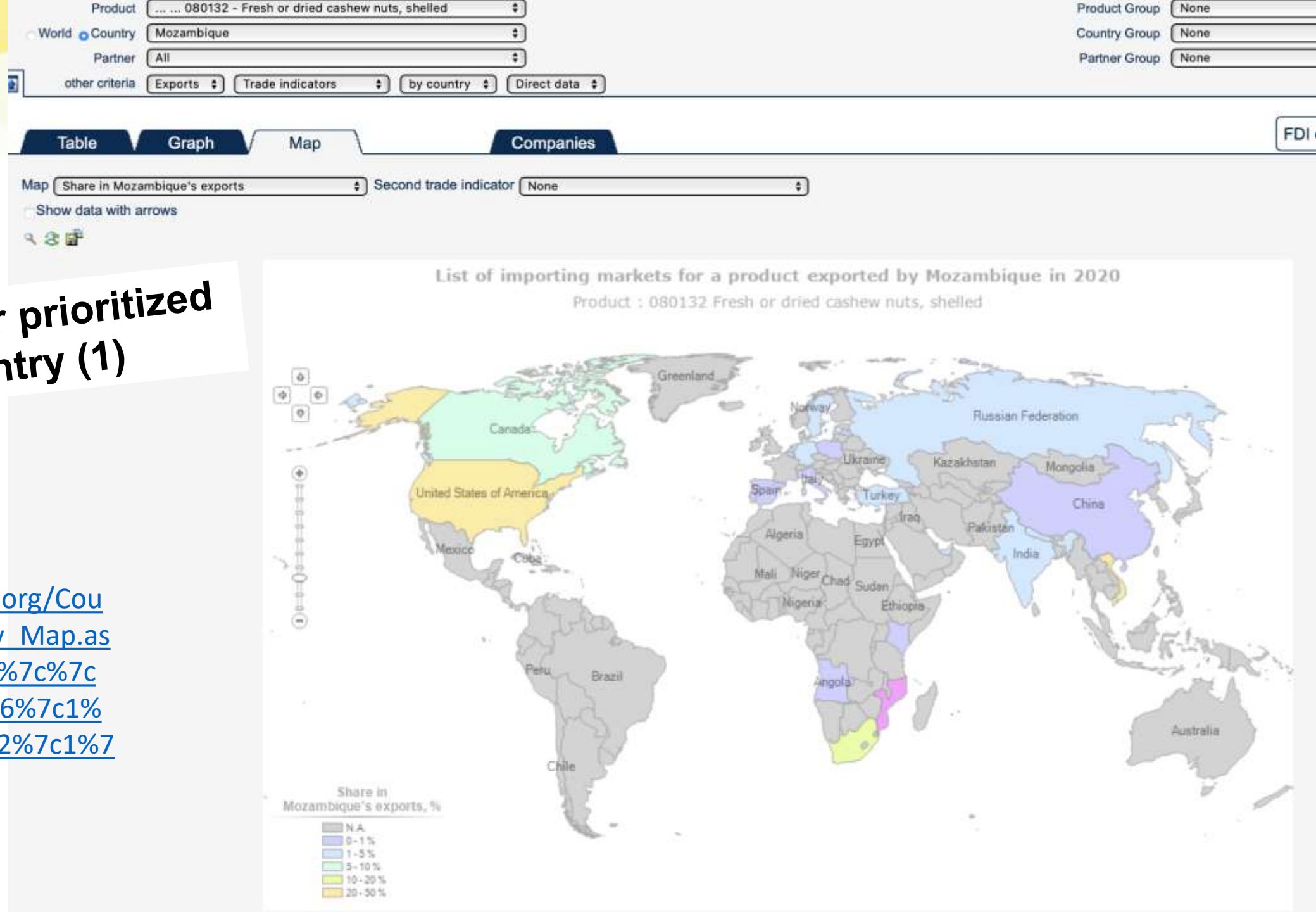
Lokale Entsorgungsmöglichkeiten beachten

Weitere Informationen finden Sie unter: lidl.de/Verantwortung

Determine your prioritized EU export country (1)

https://www.trademap.org/Country_SelProductCountry_Map.aspx?nvpm=1%7c508%7c%7c%7c%7c080132%7c%7c%7c6%7c1%7c1%7c2%7c1%7c1%7c2%7c1%7c1%7c3

Source: ITC



Determine market potential in priority markets

The European market potential for cashew nuts

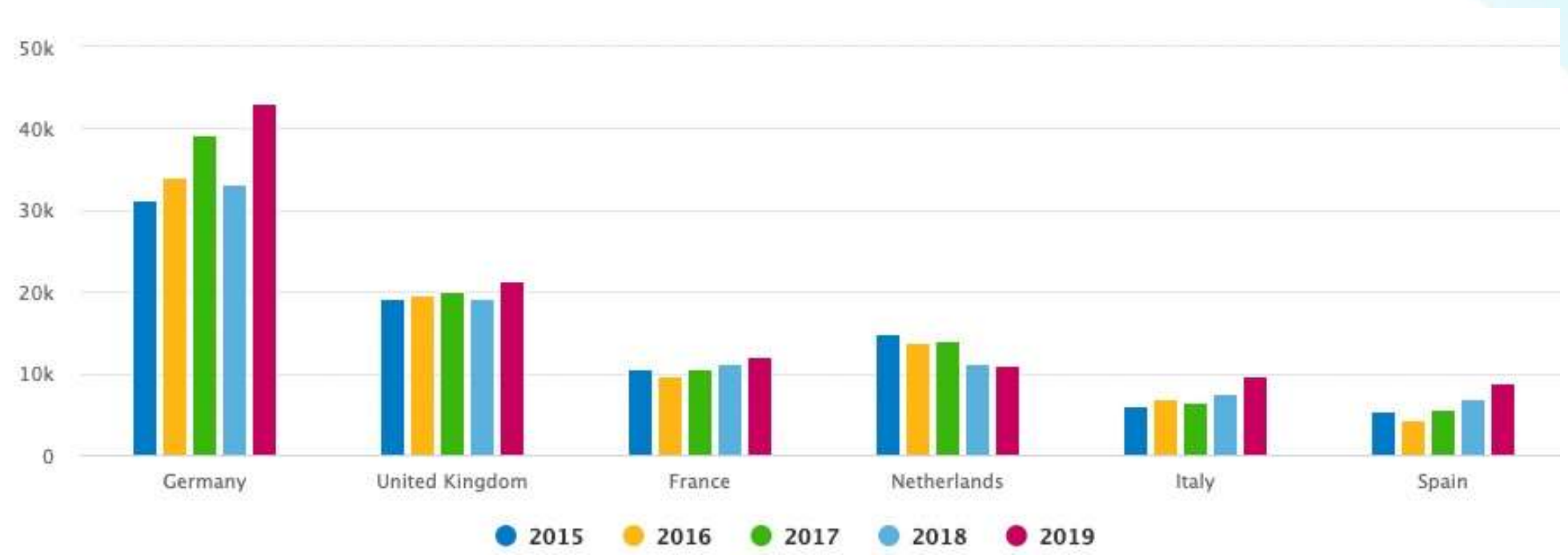
Market Information | Study published on: 2021-02-22

In the long term, the European market for cashew nuts is expected to show stable growth. This growth is likely to be driven by changes in the consumption patterns of European consumers, including the...

<https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/cashew-nuts/market-potential>

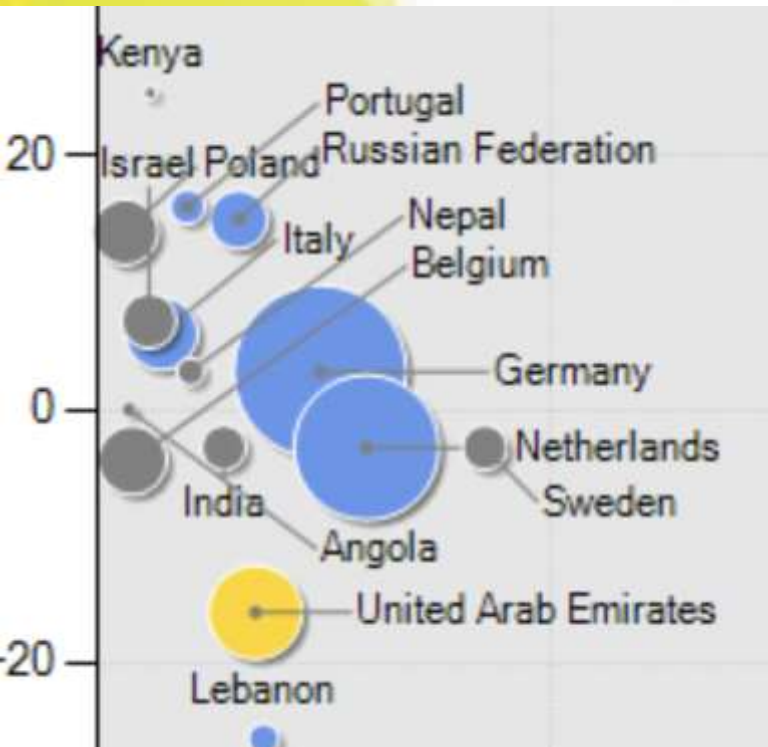
<https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/cashew-nuts/market-potential>

Main European consumers of chashew nuts

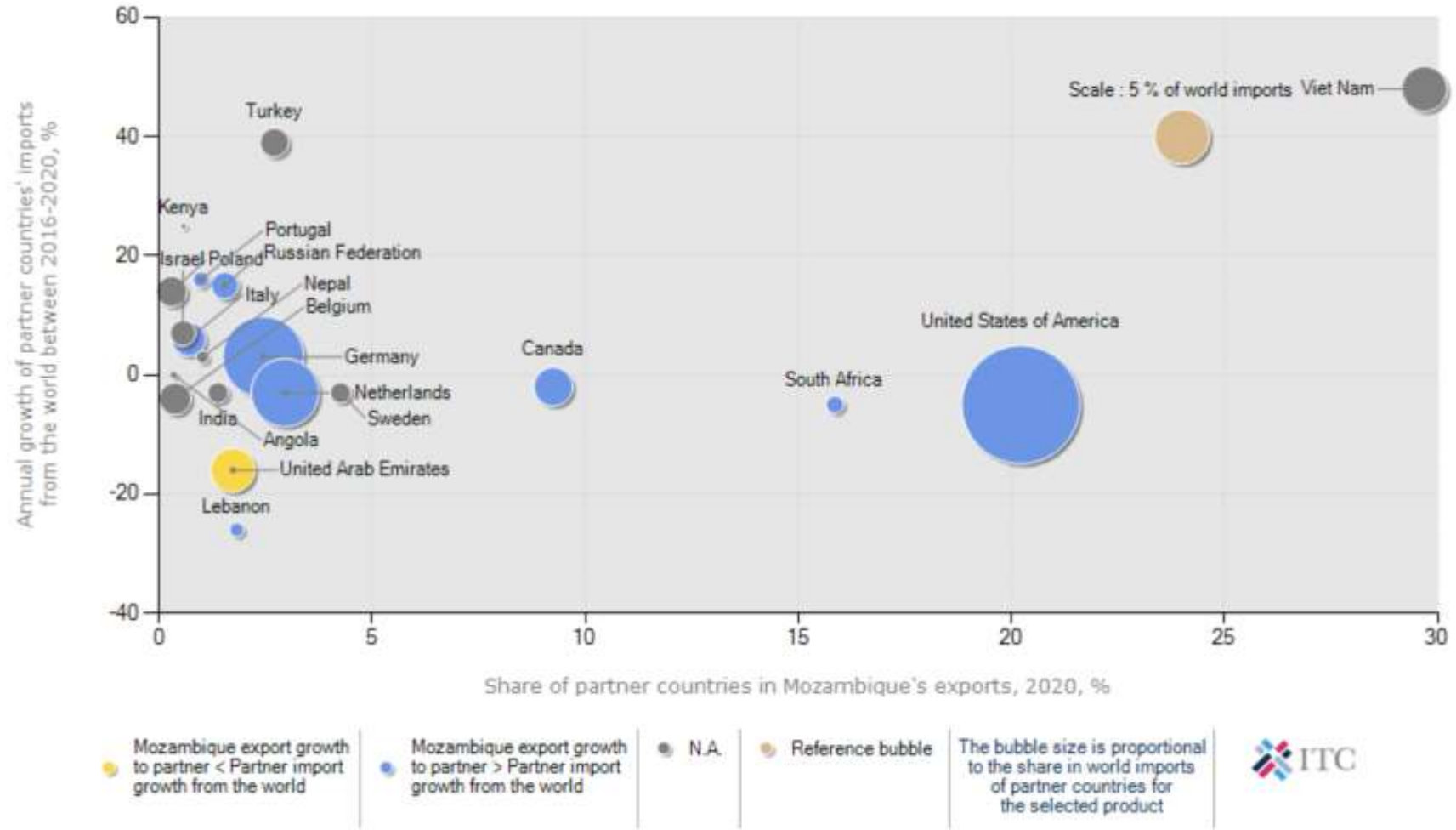


Source: CBI.eu

Compare market sizes and export potential



Prospects for market diversification for a product exported by Mozambique in 2020
Product : 080132 Fresh or dried cashew nuts, shelled



Netherlands
 Share of Netherlands in Mozambique's exports : 2.96 %
 Annual growth Netherlands's imports : -3 %
 Share in world imports : 7.99 %
 Netherlands import growth from the world < Mozambique export growth to Netherlands

Germany
 Share of Germany in Mozambique's exports : 2.45 %
 Annual growth Germany's imports : 3 %
 Share in world imports : 11.43 %
 Germany import growth from the world < Mozambique export growth to Germany

Number of importing companies in Netherlands, broken down by product categories, for the following product
Product : 080132 Fresh or dried cashew nuts, shelled

Map

Companies

Find out about importers and trade channels

<u>Product category</u>	<u>Number of importing companies available in Trade Map</u>
Berries	137
Candy, nut, and confectionery stores	89
Cashew nuts	2
Citrus fruits	144
Edible seeds	13
Fruit and vegetable markets	92
Fruit, tropical and subtropical	131
Groceries and related products, nec	6,674
Nuts, edible	140
Nuts, edible, organic	1
Nuts, processed	2
Seed fruits	140
Stone fruits	140

https://www.trademap.org/Country_SelProductCountry_Map.aspx?nvpm=1%7c528%7c%7c%7c%7c080132%7c%7c%7c6%7c1%7c1%7c1%7c1%7c2%7c1%7c1%7c3

Some EU Cashew Industry Contacts



<https://www.wlw.de/en/home>

Buyer's catalogue Germany



<https://www.zuidvruchten.nl>

Dutch Association for Trade in dried Fruit, Nuts, Spices, and related Products (Website in Dutch language only)

Source: CBI.eu

620.000 B2B-suppliers	64 industries	9 million products	5 million product videos & photos	1.4 million buyers per month
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Buyer contacts – information from buyer websites

Natural, essential oils



SO AFRICAN NATURAL OILS

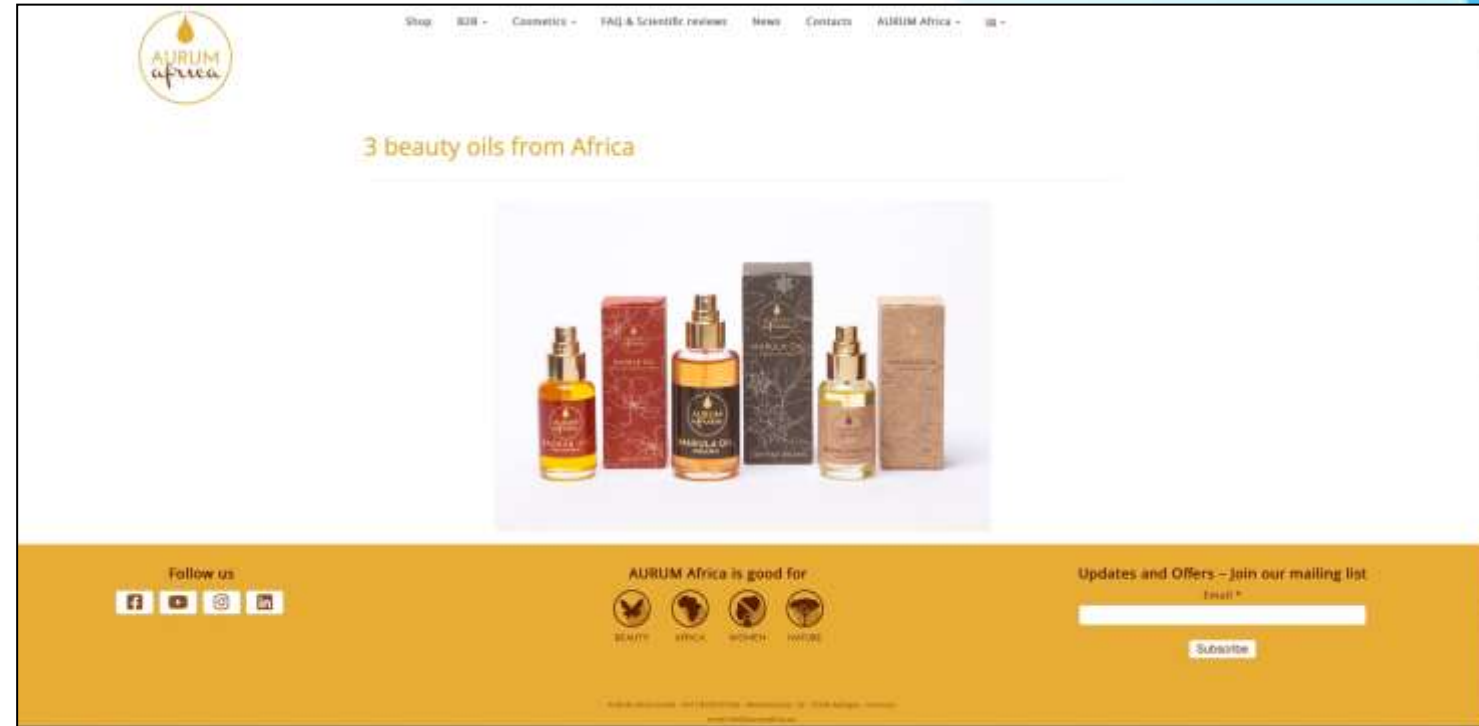
So African Natural Oils' (SANO) is a bulk supplier of quality Cold Pressed Natural Oils to the International Food & Cosmetics Industries. The company pays extra attention to operating in a sustainable and responsible manner with regard to the environment, its employees and its suppliers. The company has furthermore partnered up with municipalities, NGO's and rural based co-operatives, whereby they can benefit impoverished communities in rural areas by purchasing their wild harvested seeds and fruits.

Our range includes many indigenous African Miracle oils destined for the Cosmetics industry.



NEW
Seed Essential
Pure Elements
100% Organic
Oils Range

<https://www.soaffrican.co.za>



<https://www.aurumafrika.eu/en/3-beauty-oils-from-africa-5-3/>

More EU Market Research Data on Cashew

Tips:

- ✓ Promote the various applications and nutritional properties of cashew nuts. However, avoid health or nutritional claims that are not substantiated by scientific evidence. Check the [Health Research Database](#) of INC to find studies that have been published in scientific journals.
- ✓ Read the [CBI Market Statistics and Outlook study for Processed Fruit, Vegetables and Edible nuts](#) to learn more about general trade trends and size of specific market segments
- ✓ Check the websites of European trade shows and exhibitions to discover the newest trends. The most important trade fairs in Europe that are relevant for cashew nut trends and trade are [SIAL](#), [Anuga](#) and [BioFach](#).
- ✓ Use the online [3S Platform](#) to trace, analyse and improve cashew nut supply.

International Nut&Dried Fruit Council (INC), Spain

<https://www.nutfruit.org/health-professionals/health-research>

3 Lead-Trade Fairs on Cashew in the EU

ChainPoint - Connecting Supply Chains, Netherlands

<https://www.chainpoint.com/our-customers/3s-sustainable-cashew-supply-chain/>



Source: ChainPoint

The Most Common Mistakes Companies Make with Global Marketing

According to Harvard Business Review

<https://hbr.org/2015/09/the-most-common-mistakes-companies-make-with-global-marketing>

Mistakes may be significant to all company sizes at different levels of complexity

1. Not specifying countries
2. Not paying enough attention to internal company data
3. Not adapting sales and marketing channels
4. Not adapting the product offering
5. Not letting local teams or partners lead the way
6. Not thinking through the global logistics

Your Export Plan

Example:



[Austrade export plan template](https://www.austrade.gov.au/ArticleDocuments/1358/Austrade-export-plan-template.pdf.aspx)

<https://www.austrade.gov.au/ArticleDocuments/1358/Austrade-export-plan-template.pdf.aspx>

- I. **About the exporting Company** (domestic business overview, financial resources, staff)
- II. **Market Selection** (target markets, positioning, competitors, distribution method, sales goals)
- III. **Product** (products/services, required changes to products, production capacity)
- IV. **Pricing Strategy**
- V. **Market Entry**
- VI. **Promotional Strategy**
- VI. **Action Plan**
- VII. **Management Review and Follow-up**



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