









# PROMOVE Comércio

Mozambique

**Export Market Analysis** 

Webinar 30. November 2021

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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



# The Export Market Analysis:

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- Which segmentation?
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# The Export Market Analysis:

- Which target market?
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- Which channel?
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# Information – Strategy – Operationalization





MARKET ANALYSIS TOOLS

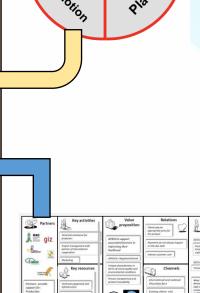
- **6.** Develop marketing mix for each target segment
- **5.** Develop positioning for each target segment
- **4.** Select the target segment(s)
- **3.** Develop measures of segment attractiveness
- **2.** Develop profiles of selected segments
- 1. Identify your specific criteria for segmenting the (EU) target market

Third step:
Market
Positioning, Client
Communication

Second step:
Market Targeting
and Differentiation

First step, basic consideration for (export) marketing strategy:

Market Segmentation



customer

# From Screening to 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
□ Political conditions, trade policy and agreements	☐ Price and quality level of national industry	☐ Legal requirements	☐ Best fit for export product
Legal (import) restrictions	☐ Competitive situation	□ Safety / Health □ Warranties	□ Easy access (language, culture)
□ Country credit worthiness, /country rating	□ Sales options	□ Packaging	□ Best comparable prices
☐ Monetary risks or other hindrances	<ul><li>☐ Market potential</li><li>☐ Market development</li></ul>	□ Labeling	□ Best comparable margins
☐ Tariff and non-tariff barriers	☐ Transport costs	□ Product safety	□ Best suitable channels
			□ Best cost/benefit ratio

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)

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

- → EUR-Lex, Summary of EU legislation on food safety https://eur-lex.europa.eu/summary/chapter/3010.html
- → <u>EU agricultural market briefs, organic products</u>
  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
- → EPA SADC agri-food trade statistics

  https://ec.europa.eu/info/sites/default/files/food-farming-fisheries/farming/documents/agrifood-epa-sadc\_en.pdf
- → <u>EU policy EPA and SADC</u> https://ec.europa.eu/trade/policy/countries-and-regions/regions/sadc/
- → <u>Eurostat − muliple EU statistics</u>
  https://ec.europa.eu/eurostat/statistics-explained/index.php?title=Africa-EU\_-\_international\_trade\_in\_goods\_statistics





#### Review Data **Optimize process** and products

Internal Processes Marketing Strategy

**Innovations** Investments

Marketing Information Systems; Marketing **Controlling MEASURE** 

**Profitability** Market Share Benchmarking A/B/C Client Analysis Sales Channel Performance

#### Customers

Needs, buying criteria Attitudes, benefits

#### **COLLECT DATA**

Market scan Market research

#### UNDERSTAND

#### **ANALYSE**

#### **Big Picture**

Markets and Segments Competitive Structure **Economic Viability Supply Chains** 

> **Strategies Business Plans Business Models**

#### PLAN / DECIDE

Which Export Markets Which Customers Which Trade Channels Which Standards, Certificates Which Competitive Edge

#### Sales Development

Sales Process, Territory Account Management Prospecting, Forecasting **Quotations and Negotiation** Training, Monitoring

**OPTIMIZE** 

Sales Development

Value Adding

#### **IMPLEMEN**

#### Marketing **Communications**

Product & Services

Development

Advertising **Exhibitions Direct Marketing** Online Marketing Sales Support

#### **Marketing Plans**

Product and Service specs. **Export Promotion Pricing Policy** Distribution Competitive Advantages

# 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.

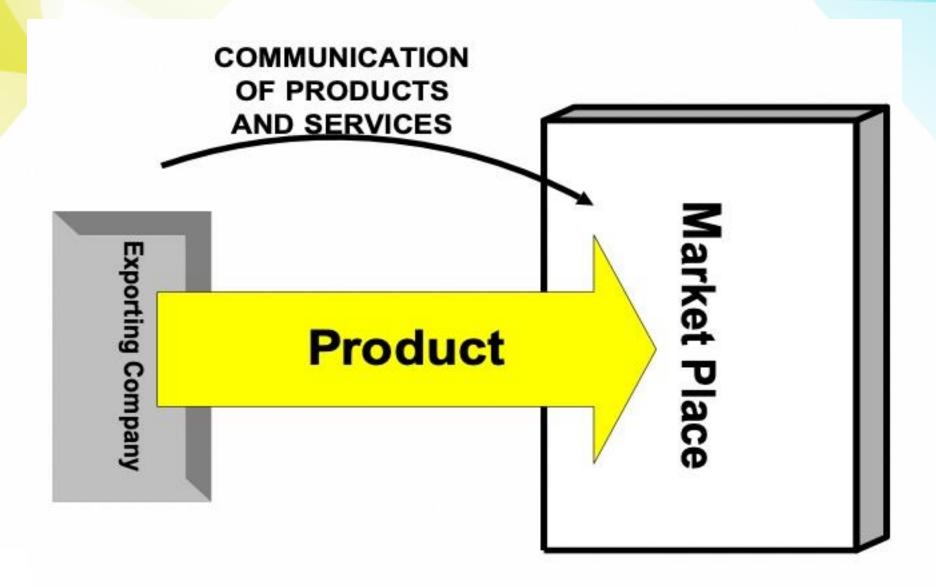
It is a management responsibility to invest time, efforts and resources for finding and analysing suitable information from potential target markets.

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.

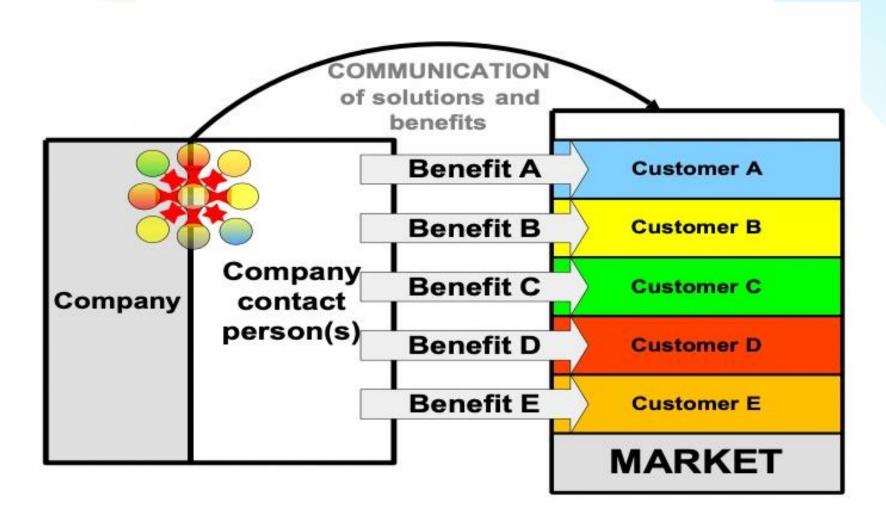
# The Old Paradigm





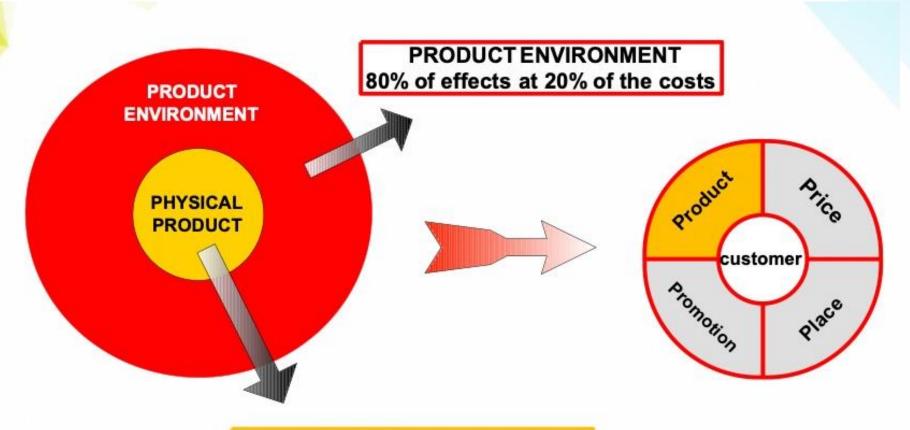
# The New Paradigm – Customer oriented Approach





# Combination of Product – Product Environment – Services





PHYSICALPRODUCT 20% of effects at 80% of the costs

# **Export Market Analysis**

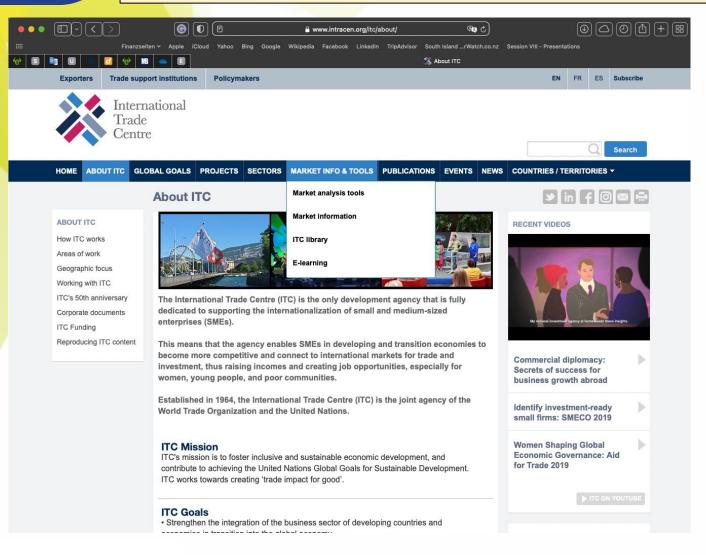


Market Profile	Market characteristics for the products growth rates, Structural changes, potential market/product segments, alternative trends at markets, Consumer trends, price segments
Competitive Profile	Distribution methods competitors' landscape, competitive strength of main competitors, own competitive 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





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

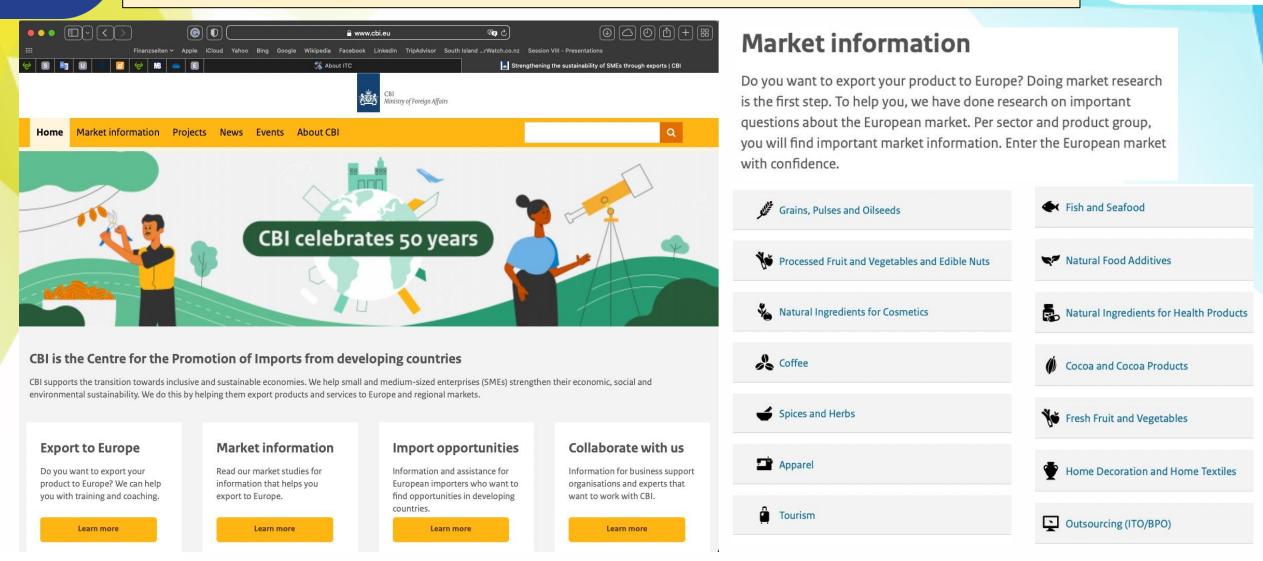
https://www.trademap.org/Index.aspx

Source: ITC

### **Market Research and Information Tools**



Overview of selected primary information sources for export to the EU

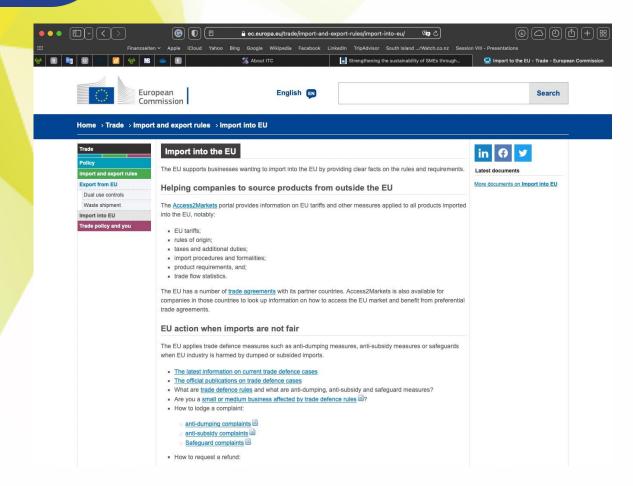


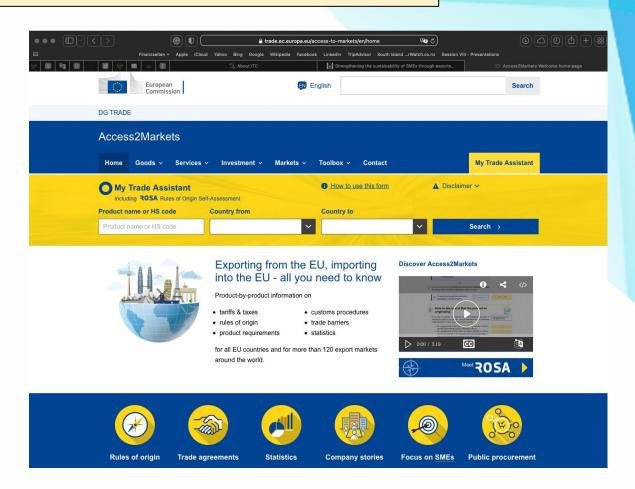
https://www.cbi.eu

### **Market Research and Information Tools**



Overview of selected primary information sources for export to the EU





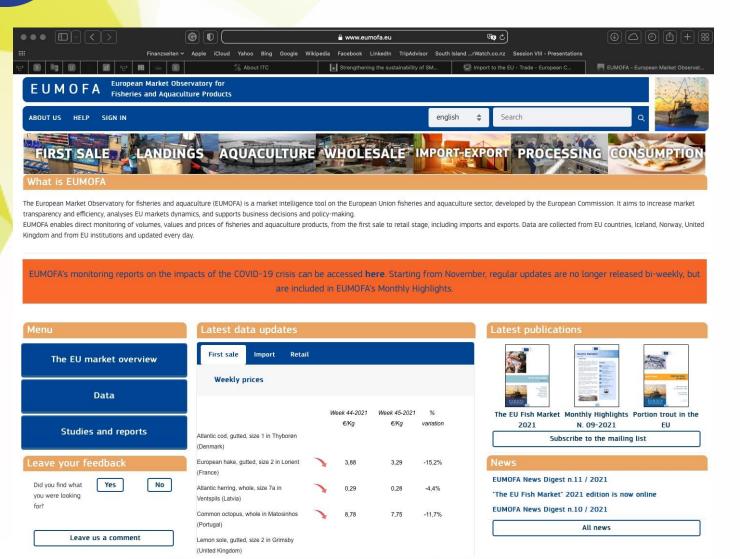
https://ec.europa.eu/trade/import-and-export-rules/import-into-eu/

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





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

Source: eumofa.eu

## **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/
- → ITC Export potential for agri-food products from Mozambique

  https://exportpotential.intracen.org/en/products/treemap?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

## **Market Visits, Trade Fairs**



Direct research and visit to markets and tradefairs (selection below)

→ BIOFACH, Germany <a href="https://www.biofach.de">https://www.biofach.de</a>





1,442 international exhibitors 15.-18.02.2022

→ Grüne Woche, Germany <a href="https://www.gruenewoche.de/en/">https://www.gruenewoche.de/en/</a>



1,800 international exhibitors

→ ANUGA, Germany <a href="https://www.anuga.de/">https://www.anuga.de/</a>



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 tradefairs

→ TUTTOFOOD, Italy <a href="https://www.tuttofood.it">https://www.tuttofood.it</a>



1.072 international exhibitors 08.-11.05.2023

→ **SIAL**, France



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

https://www.sialparis.com

## **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

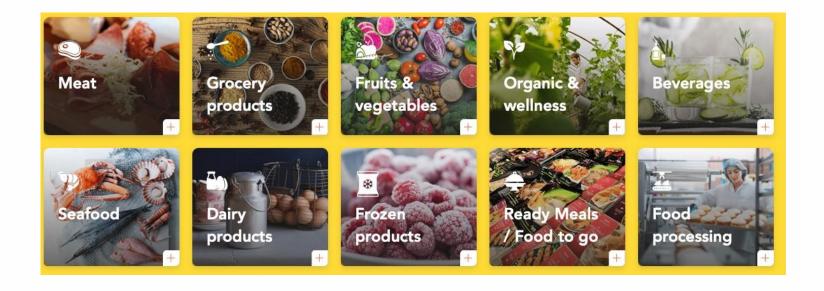


#### **Current 7 Food Trends according to ANUGA**

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 & anchient Grains	

**SIAL** considers typical key sectors in the global food industry



# **EU Market Research and Analysis – Example NUTS and GRAINS**





#### TRADE MAP

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



Zutat für asiatische Gerichte. Oder genießen Sie die naturbelassenen Casnewkerne als leckeren Snack zwisch durch.

Lipl	Nährwerte		
	ø/100 g	ø/Portion 30 g	%RI
Energie	2488 kJ/600 kcal	747 kJ/180 kcal	9 %
Fett davon gesättigte Fett davon einfach unges davon mehrfach unge	ättigte Fettsäuren 29,7 g	14,3 g 2,7 g 8,9 g 2,7 g	20 % 14 %
Kohlenhydrate davon Zucker	19,8 g 6,5 g	5,9 g 2,0 g	2 % 2 %
Ballaststoffe	5,2 g	1,6 g	270
Eiweiß	20,5 g	6,2 g	12 %
Salz	0,02 g	0,01 g	<1%
RI (reference intake) = Erwachsenen (8400 k	Referenzmenge für einen d 1/2000 kcal)		
Mineralstoffe	ø/100 g	4	%NRV
Magnesium	260 mg		69 %

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-Hansemann-Straße 1-25, D-52531 Übach-Palenberg



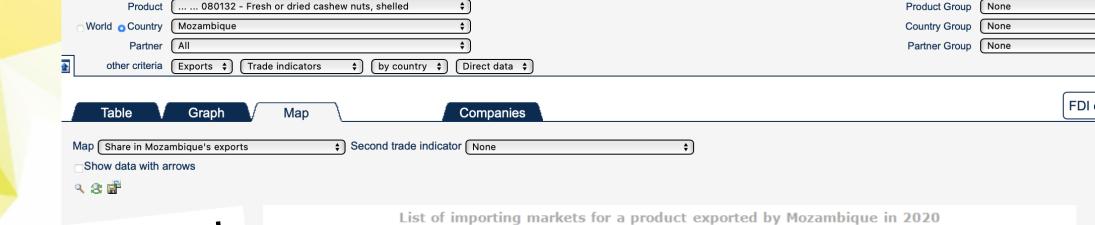






Lokale Entsorgungsmöglichkeiten beachten

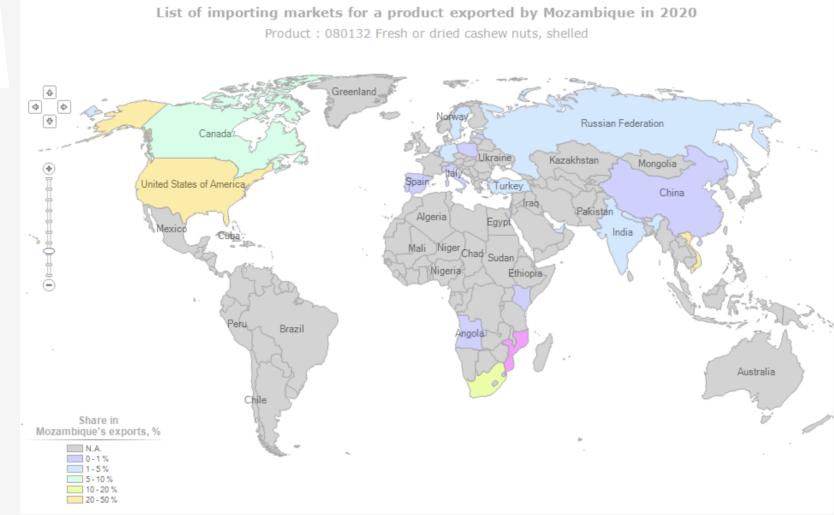
Weitere Informationen finden Sie unter: lidl.de/ Verantwortung



# Determine your prioritized EU export country (1)

https://www.trademap.org/Country\_SelProductCountry\_Map.as px?nvpm=1%7c508%7c%7c%7c %7c080132%7c%7c%7c6%7c1% 7c1%7c2%7c1%7c1%7c2%7c1%7 c1%7c3

Source: ITC



# Determine market potential in priority markets

#### The European market potential for cashew nuts

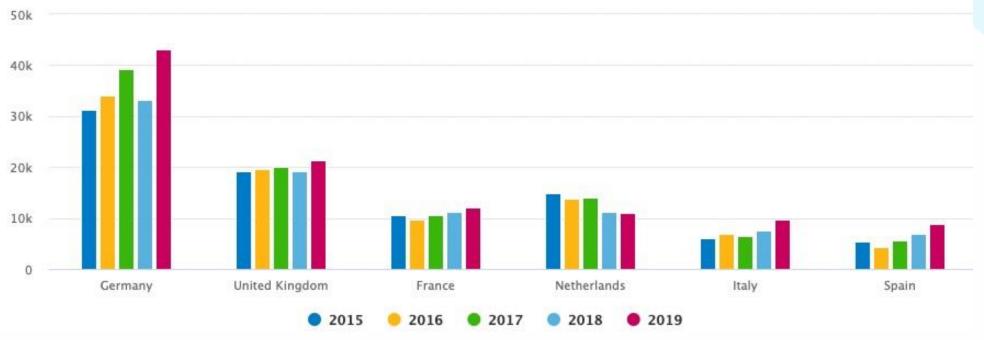
Market Information | Study published on: 2021-02-22

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

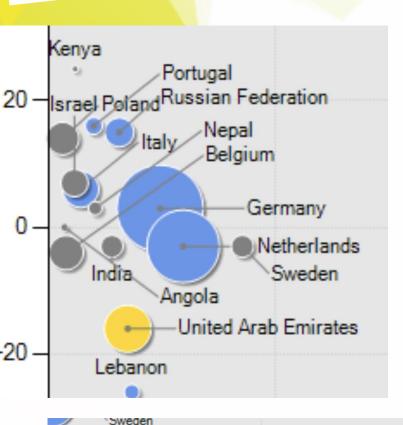
https://www.cbi.eu/market-information/processed-fruit-vegetables-edible-nuts/cashew-nuts/market-potential

Main European comsumers of chashew nuts



Source: CBI.eu

# Compare market sizes and export potential

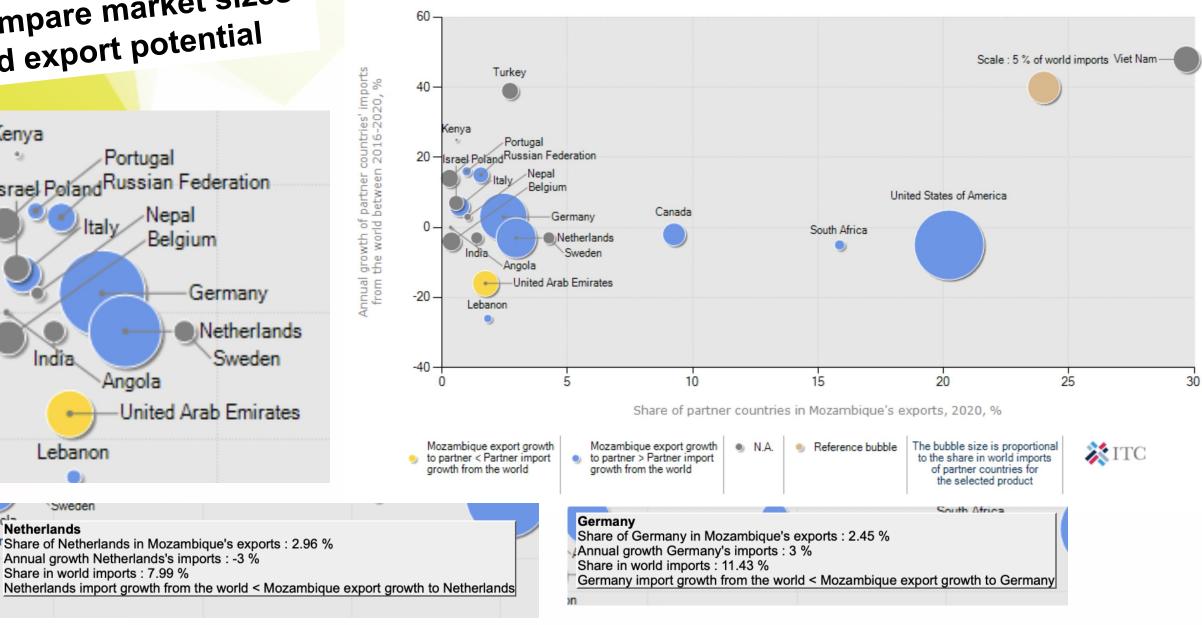


Ur Share of Netherlands in Mozambique's exports: 2.96 %

Annual growth Netherlands's imports: -3 %

Share in world imports: 7.99 %

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



Source: ITC

Netherlands

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

Map

Companies

Find out about importers and trade channels

Product category	Number of importing companies available in Trade Map
<u>Berries</u>	137
Candy, nut, and confectionery stores	89
<u>Cashew nuts</u>	2
<u>Citrus fruits</u>	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%7c6%7c1%7c1%7c1%7c1%7c1%7c1%7c2%7c1%7c1%7c3

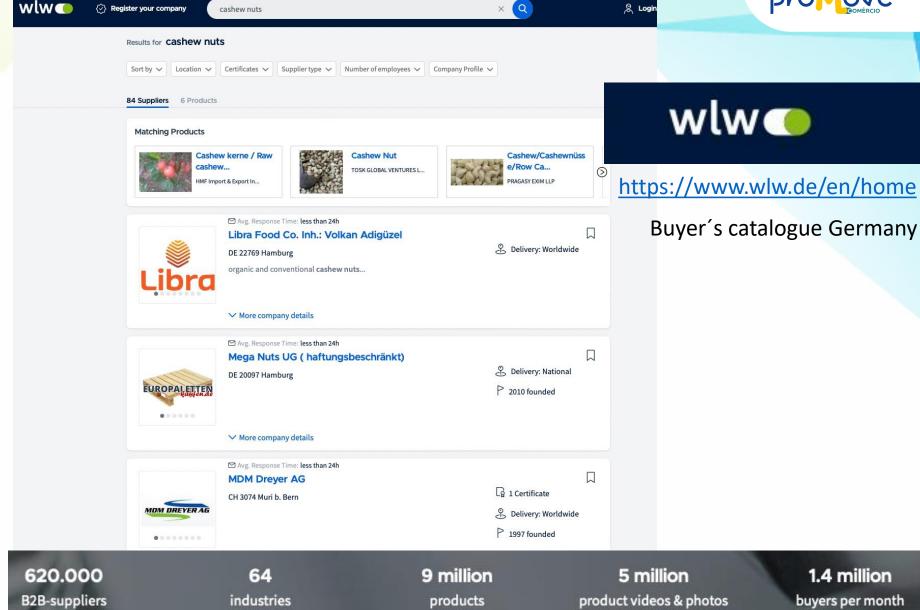
# Some EU Cashew Industry Contacts





https://www.zuidvruchten.nl

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



Source: CBI.eu

### **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.

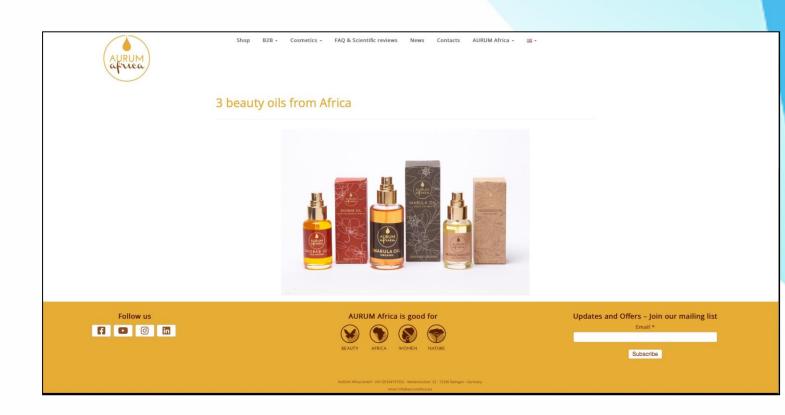
Our range includes many indigenous African Miracle oils destined for the Cosmetics Industry.



#### **NEW**

Seed Essential Pure Elements 100% Organic Oils Range

https://www.soafrican.co.za



https://www.aurumafrica.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.
- International Nut&Dried Fruit
  Council (INC), Spain
- https://www.nutfruit.org/health-professionals/health-research
- ✓ 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 ☑.
- 3 Lead-Trade Fairs on Cashew in the EU

✓ Use the online 3S Platform 

I to trace, analyse and improve cashew nut supply.

ChainPoint - Connecting Supply Chains, Netherlands

Securing Sustainable Supply

https://www.chainpoint.com/ourcustomers/3s-sustainable-cashewsupply-chain/

Source: CBI.eu 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

Source: Harvard Business Review, 2015

## **Your Export Plan**



**Example:** 



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

Austrade export plan template

- 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









THANKYOU

**OBRIGADO**