



Market opportunities and entry strategies for cassava and cassava related products in the United Kingdom

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Sierra Leone

West Africa Competitiveness Programme

About the paper

This study was undertaken by the International Trade Centre within the framework of implementing the Sierra Leone West Africa Competitiveness Programme, which is financed by the European Union under the 11th European Development Fund and implemented by the United Nations Industrial Development Organisation in partnership with the International Trade Centre.

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Introduction

The International Trade Centre (ITC), in partnership with the United Nations Industrial Organisation (UNIDO), is implementing a technical assistance project in Sierra Leone under the West African Competitiveness Programme (WACOMP). The project aims at increasing Sierra Leone's competitiveness through enhanced productivity and trade compliance in the cocoa, cassava and oil palm value chains with a view to boosting the country's integration into regional and global value chains.

The project has specific objectives of improving the performance, growth and contribution to industry, regional trade and exports of the three value chains, and improving the business climate at the national level.

Identification of international market opportunities for Sierra Leone's cassava products and developing a roadmap for product and market development to facilitate access to global markets have been an important objective of interventions under the project. This study is conducted to respond to these needs by identifying and analyzing opportunities in the United Kingdom (UK) market and proposing useful market entry strategies into the UK for Sierra Leonean producers and exporters.

Acknowledgements

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Acronyms

AGOA	African Growth and Opportunity Act
B2B	Business to Business
BRC	British Retail Consortium
EORI	Economic Operators Registration and Identification
EPA	Economic Partnership Agreement
EU	European Union
GAP	Good Agricultural Practices
GDP	Gross Domestic Product
GSP	Generalised System of Preferences
HACCP	Hazard Analysis Critical Control Points
HMRC	Her Majesty's Revenue & Customs
HS	Harmonized System
IFS	International Featured Standards
IGD	Institute of Grocery Distribution
ISO	International Standards Organisation
ITC	International Trade Centre
NPD	New Product Development
RSPO	Roundtable on Sustainable Palm Oil
SME	Small and Medium-sized Enterprise
UN	United Nations
UNIDO	United Nations Industrial Development Organisation
USP	Unique Selling Propositions
VAT	Value Added Tax
WACOMP	West Africa Competitiveness Project

Executive summary

Cassava in the UK is emerging as diverse market and on-trend in terms of consumer demands. Currently, it is a low volume crop with a niche market garnering neither major entities nor established supply chains.

Furthermore, cassava is increasingly relevant to the burgeoning health and wellness trend being adopted by a younger consumer group², as well as the Free From movement, which could see it positioned as a wheat/gluten alternative³. It also has a strong base with World Food importers, particularly African speciality wholesalers that serve an increasing diaspora market, and brings great opportunity for value addition through processing and manufacturing that has yet to be fully explored⁴.

Although cassava products require a long-term strategy, the crop stands to reap an increase in volume by developing a campaign focused on World Food niche areas. Sierra Leonean produce could also gain a competitive advantage depending on the outcome of Brexit negotiations, with free trade maintained thanks to its existing trade agreement with the United Kingdom⁷.

However, caution should be applied, as initial conversations with Sierra Leonean stakeholders reveal supply issues that need to be addressed before high volume entry into global markets. Sizeable investments are needed by producers in Sierra Leone to fix internal production challenges that currently prevent the country's potential for long-term supply into global markets at scale. Finally, the coronavirus outbreak makes building a long-term strategy a greater challenge to meet supply and demand capabilities.

The following recommendations have been made toward improving the positioning of Sierra Leone's cassava products into the UK market, as a result of the findings and analysis of this report:

- **Short-term recommendations for cassava and cassava related products**

1. Address quality issues to ensure continuity of product, including consideration of identified standards required to supply the export market.
2. Invest in packaging solutions that offer greater flexibility to the UK buyer, including sample packaging.
3. Consider subsidies and/or investment that will facilitate greater production of products at scale that adhere to international standards.
4. Begin a market readiness and access campaign, aimed at helping SMEs and exporters meet the requirements of the UK market and forming a detailed plan for market access. The campaign would include identifying key Unique Selling Propositions (USPs) of Sierra Leonean cassava that provide a competitive advantage, produce sales literature and other marketing tools (e.g. websites) to facilitate a sales campaign. Being that UK buyers are particular, incorporating training to access these specific buyers remains essential.
5. Launch a sales campaign concentrating on garri, despite its limited market size it is already produced in high volume.

- **Long-term recommendations for cassava and cassava related products**

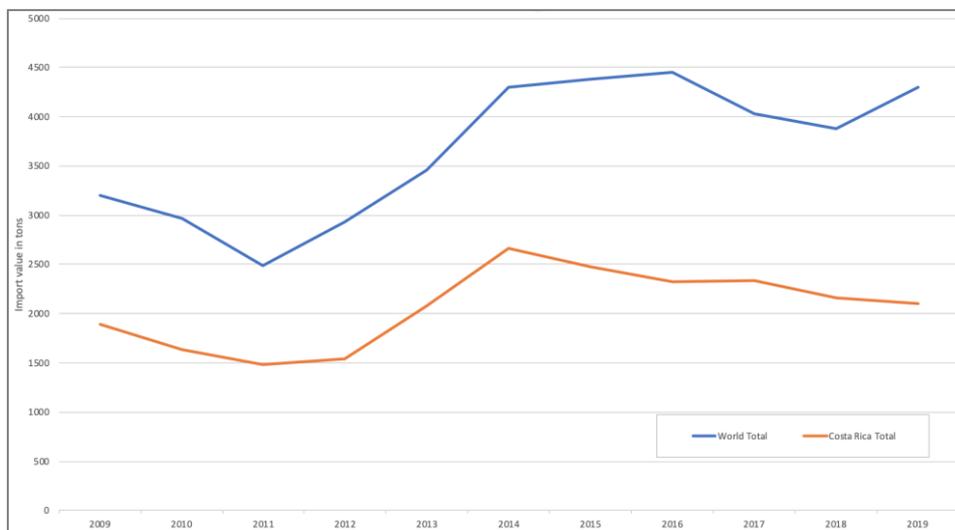
1. Employ a UK sales agent to negotiate contracts on behalf of producers as well as to execute sales and promotion aimed at the World Foods sector.
2. Consider certification schemes such as Rainforest Alliance and/or organic methodology in order to open up new markets.
3. Invest in a packing/labelling capacity to open up the private label sector.
4. Consider New Product Development (NPD) to offer more options to UK buyers in different markets and other value-added products such as frozen leaves and flour.

PART 1: THE UK CASSAVA MARKET & RELEVANT DISTRIBUTION CHANNELS

1.1. Market Overview

In 2019, the UK imported almost £4 million worth of cassava under **HS code 071410 (Fresh, chilled, frozen or dried roots and tubers of manioc "cassava")**¹, and a further £2.2 million of **tapioca starch** under **HS code 190300**. While a relatively small market, this equated to 4,295 tons of cassava, of which almost 50% was sourced directly from Costa Rica. In general, however, imports of cassava have been slowly rising over the past decade, while the percentage sourced from Costa Rica has gradually fallen as shown in figure 1. This information will be further explored in section 1.3.

Figure 1 - UK Import volumes of Fresh, chilled, frozen or dried roots and tubers of manioc "cassava" (HS 071410), in tons, 2009 - 2019



Source: UN Comtrade Statistics¹

In broad terms, historic research has pointed to three main market opportunities for cassava products in the UK²: as flour into the retail and food service industry, as starch as a raw material in the food processing industry and as chips for various purposes. While this provides a reputable guide, routes for cassava and its derivatives have become increasingly diverse due to a number of increasing and prominent UK trends, as well as its status as a relatively cheap commodity with gluten free status. Cassava starch has undergone considerable growth in the past decade, and this will be explored further in section 1.4.

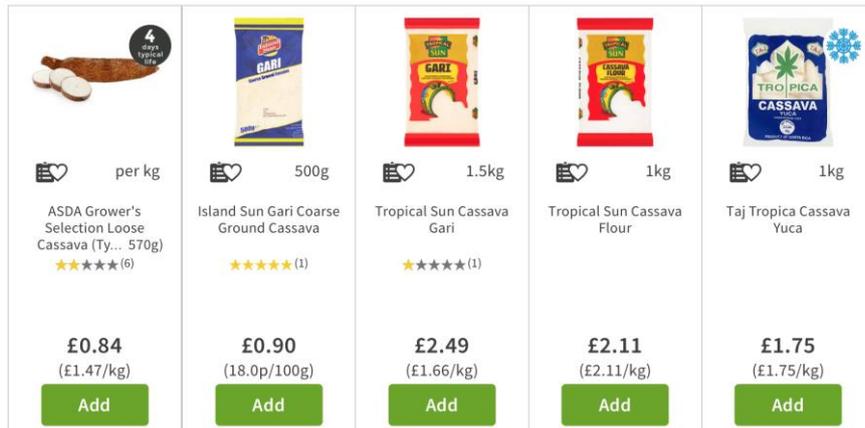
Imports for **cassava flour** are more difficult to track since they fall under **HS code 110620**, which is shared with other tubers such as arrowroot, salep, sweet potatoes and others. Import volumes have been relatively stable for many years, but this could hide fluctuation in individual products, although this is not possible to identify.

According to Market Research Future³, the European cassava market is expected to register the highest compound annual growth rate (CAGR) of any worldwide up until 2024 due to high consumption of snacks and baked products as convenience foods, with the report stating 'there is a noticeable export of cassava products such as cassava chips, cassava starch, tapioca, fresh cassava and cassava meal from Nigeria to Europe', showing market potential for value add products.

Indeed, as the free-from movement gathers pace in the UK and wellness considerations become more and more important to younger consumers in particular, the market for cassava and tapioca flour/starch is emerging, and growing. This could be supplied via the traditional retail channel or into food service, via either branded or bulk. Bulk would also be possible into the manufacturing and food processing industries, most prominently via natural product distributors who sell both tapioca and cassava and are at the forefront of health and wellbeing food trends in the UK.

Given its prominence and importance as an African staple⁴, targeting the niche world foods segment is also possible, and would lead to potential for garri alongside other produce such as dough and leaves. Leading UK supermarket, ASDA, offers fresh cassava via its online store⁵, alongside a number of other products in its world food aisle, as displayed in Figure 2. The Tropical Sun brand is owned by and sourced from Surya Foods, one of a number of world foods wholesalers in the UK who would provide the most obvious entry point for cassava exporters and would warrant further exploration.

Figure 2 - UK supermarket ASDA's online selection of cassava products



Source: ASDA website⁵

According to the 2011 UK census⁶, almost one million residents in England and Wales identified as 'Black African', with a further 166,000 'Mixed White/Black African'. This represents a considerable diaspora, and one that is growing with the Black African segment having doubled in size since the previous census in 2001. Given 98% lived in urban areas and almost 60% were in or around the London area⁷, there is an obvious target audience for traditional cassava products in the nation's capital and other cities. The majority of this audience will be reached via niche importers supplying specialist African stores.

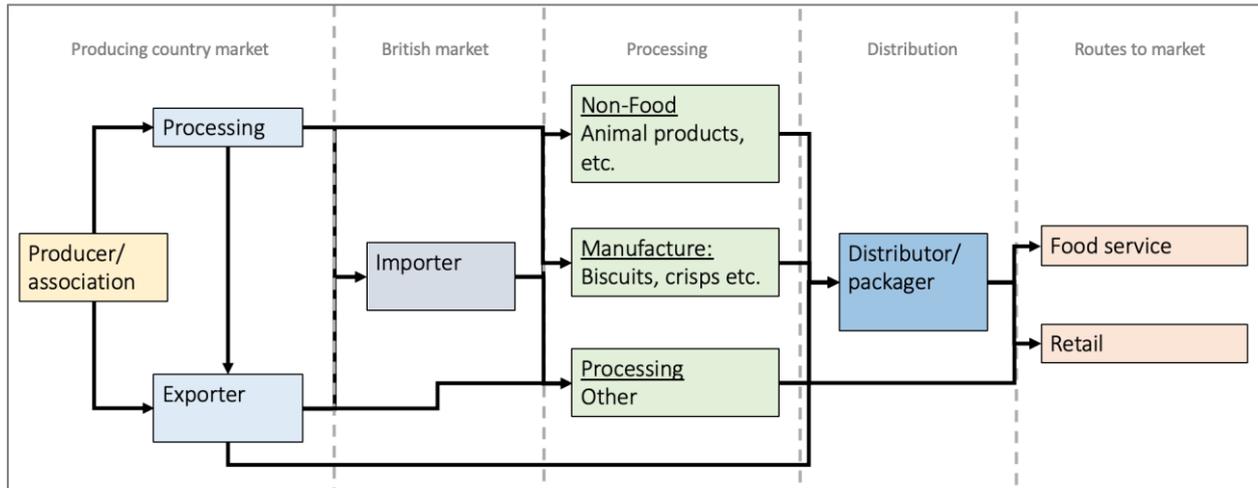
Given the cassava market is still very young in the UK outside of these niche markets, penetration into mainstream retail has not yet fully occurred. In order to identify the future of cassava in the UK, there are other markets, which can be explored as an indicator to add weight to predictions and recommendations. The USA in particular can be a good precursor for UK movements; food trends and directional changes generally tend to emerge three to five years before they embed themselves in the UK³, and these will be explored later in the report.

In terms of the wider food industry and cassava as a processing ingredient, there has recently been a surge in usage of tapioca starch in premium pet food categories. While this is still a young and evolving category, there is considerable room for growth here in supplying manufacturers via bulk wholesalers.

1.2. Market Structure and Key Players

In general, the supply chain for cassava products can be simply represented by one of the routes shown in Figure 3. While the actual situation is often more complex, it does provide an overview of common routes to market.

Figure 3 - Typical supply routes for cassava products into the UK



Source: Author

There is considerable opportunity to supply the UK direct depending on product, certainly for whole, raw products where many importers and retailers want to work as close to source as possible in order to have full control over supply chains. It is also possible that the UK distributor/packager may be supplied before the processor, with many importers also acting as bulk distributors, particularly in the world foods niche.

The main consideration for building long term value from the supply chains shown in figure three will be building value addition via increased processing within the country of origin.

The main purpose of this section is to identify key targets at each stage of the supply chain, noting key products relevant for supply, as well as requirements.

Import/distribution

UK importers operate in a number of areas, and so chosen partners will very much depend on the product being imported and its volume. As mentioned in section 1.1, the UK imported almost £4 million worth of cassava in 2019 and a further £2.2 million of tapioca starch, with a considerable proportion of this destined for sale via wholesale. There was also a further £1.5 million of flour, albeit across various roots and tubers.

In general, larger retail organizations want to buy their fruit, vegetables and other fresh food products as close to source as possible in order to maintain control and transparency. This has led to supply chain integration where producers, importers and retailers are working closely together¹. To enter the fresh supermarket sector in particular, a reliable volume and full service will be required such as packing and logistics, making it a longer-term goal for Sierra Leone.

There are also a number of smaller and niche importers who will be more familiar with cassava and its derivatives. Some specialized importers, outlined in table 2, hold an assortment of fruits and roots and some specialize in African produce, both fresh and processed. Working on smaller volumes, some of these importers can assist with access to wholesale and retail markets, offering ready-made supply chains, and can also provide packaging options allowing continued bulk supply. Private label is also an option if available. Working closely with an experienced importer/distributor can be of benefit for new exporters looking to establish links in the UK for this very reason.

Processing/manufacturing

Many manufacturers, in a similar way to larger retailers, will also look to shorten the supply chain, particularly when operating at high volumes. There is increasing demand for processing to take place in the country of origin in order to lower costs, but import volumes remain niche and low volume.

The majority of produce is sold bulk as flour/starch, and as a result the cassava manufacturing and processing industry is incredibly difficult to quantify in terms of overall market value due to its incredibly

diverse nature. Different manufacturers and producers will have different requirements in terms of product, quality and volumes to be used. A number of leading UK manufacturers and processors of cassava and cassava-containing products can be seen in table 1, with ingredients used laid out where possible.

Table 1 - A list of leading UK processors and manufacturers of cassava products.

Company	Sector	Products	Ingredients used
CoFresh	Food & Drink	Cassava chips (crisp)	Flour
Alvan Blanch	All	All	All
Bake Rite	Food & Drink	Various	Various
Isabel's Free From	Food	Bread, other baked goods	Flour
Lily's Kitchen	Animal Feed	Dog Food	Tapioca starch

Table 2 - A list of leading UK distributors and importers of cassava products

Distributor	Segment	Product
CLF Distribution	Natural and Organic	Bulk, branded & private label
Tree of Life	Natural and Organic	Bulk, branded & private label
SUMA	Natural and Organic	Bulk, branded & private label
Samways	Fine Food	Branded & private label
Wanis	World Foods	Branded & private label
CressCo	Deli & Fine Food	Branded & bulk
Cafe Deli Wholesale	Food service	Branded, bulk & private label
Bestway	Mainstream	Branded, bulk & private label
Bookers	Mainstream	Branded & bulk, frozen
Surya Foods	World Foods	Branded & private label
Jumbo	African Wholesaler	Branded, bulk & private label
Mac Philips	African Importer & Wholesaler	Bulk
Abi Global Foods	African Importer & Wholesaler	Branded, bulk & private label
Tropical Foods Logistics	African Importer & Wholesaler	Bulk
Akoma Foods Ltd	African Importer & Wholesaler	Bulk

TK Foods	African Importer & Wholesaler	Bulk
Maggie's Exotic Foods	African Importer & Wholesaler	Branded, bulk & private label
Wosi Wosi	African importer and online D2C retailer	Bulk, private label
Olaiya African Food Store Ltd	African importer and online D2C retailer	Bulk, private label
Taj Foods	Distributor	Bulk, frozen

Routes to market: Retail

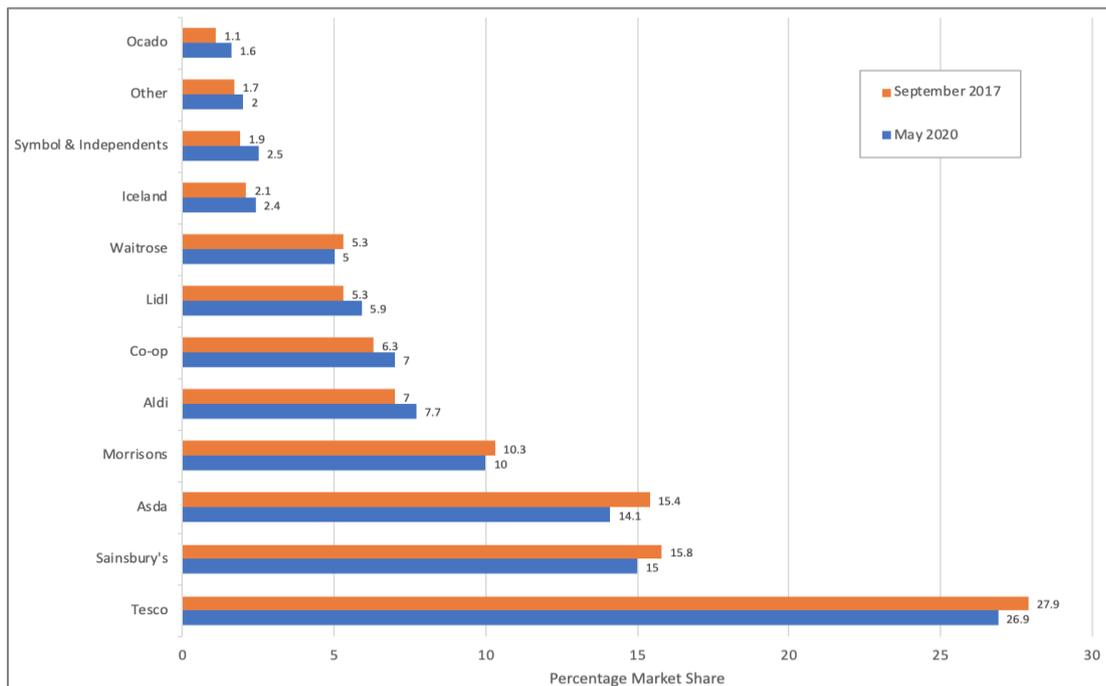
a. Mainstream Multiples

To build a full picture, while mainstream retail is yet to feature cassava heavily as a product, it is worth considering as penetrating this market will ultimately be the goal to increase volume.

Within the mainstream multiple market there are a number of dominant brands that are known worldwide: Tesco, Sainsbury's, ASDA, Morrisons and more. They have a large share of a grocery market that was valued by IGD at £193 billion pounds in 2019, and is expected to grow by a further £24.1bn, or 12.5%, by 2024².

Figure 4 shows how the chains are currently positioned within the UK market, according to recent data released by Kantar Worldpanel, and how this compares with 2017³.

Figure 4 - Market share of grocery stores in Great Britain in the 12 weeks ending 17/5/20 and 10/9/17



Source: Kantar Worldpanel³

Since the Brexit referendum in 2017 the retail landscape has become increasingly volatile; uncertainty and rising inflation has led to discounters Aldi and Lidl seizing market share from more established rivals, while online retailer Ocado and independents have increased their relative share considerably.

This trend is set to continue. According to further IGD research⁴, discounters are set to see the second greatest increase in turnover over the next five years at around 40%, just slightly behind online which is expected to grow almost 44%. Convenience outlets are also expected to see growth far quicker than supermarkets/hypermarkets at 16%, showing a considerable shift in consumer behavior.

The coronavirus pandemic and the unprecedented recession that is predicted to follow⁵ is only likely to accelerate these changes further, particularly if a second spike of the virus occurs, further impacting the economy. Long term plans therefore must take this changing landscape into consideration.

b. High-end and independent

Within the large supermarkets only a small number of cassava products are sold, and the majority of these goods come from World Food importers and distributors, as previously shown. For more speciality produce, independent health stores and other ethically-conscious multiples represent the most obvious route to market, as their consumers are aligned with their brand values and they are considerably easier to access. Many offer cassava flour and tapioca starch as a standard, and a list of leading higher-end retailers can be seen in table 3. These could potentially all be targeted with bulk, although packaging will more than likely be required to access these sales channels, as well as organic certification.

While these stores represent just 11.1% of the overall market according to data included in figure 4, this is up from 10% in 2017 (if Waitrose is excluded, this is growth from 4.7% in 2017 to 6.1% in 2020). They also hold a considerably larger portion of the free-from and speciality markets that cassava products are currently most relevant to.

Table 3 - Leading high end, independent and organic retailers in the UK

Name	Description	Location	Type
Waitrose	High-end grocery retailer	Countrywide	Multiple
Ocado	Online high-end grocery retailer	Countrywide	Online retailer
Planet Organic	Organic health chain	London	Multiple
Whole Foods	Organic health chain	London	Multiple
BuyWholeFoodsOnline	Online whole foods retailer	Countrywide	Online retailer
Hatton Hill Organic	Whole foods retailer	Countrywide	Online retailer
Holland & Barrett	Health store chain	Countrywide	Multiple
Abel & Cole	Online retailer	Countrywide	Online retailer

Source: Author

Because of the smaller nature of some of the retailers outlined in table 3, they often lack a central distribution hub and so rely on wholesalers, as listed previously, to supply their goods.

a. Niche and World Foods retailers

Many independent, speciality and world food retailers exist in the UK, particularly in London where they cater to an incredibly and increasingly diverse population⁶.

The majority of these stores are single site, family-owned affairs and will source the majority, if not all of their produce from wholesalers and distributors, the likes of which have been outlined in tables two and three. Entry into these operations is therefore key to building volume in the UK.

b. Online and direct to consumer

While a majority of goods purchased online are done so via websites of some of the high street's largest historic brands, there has been a considerable rise in online retail sales in general⁷, as well as direct to consumer schemes.

Online sales have been further boosted by the coronavirus outbreak, with all types of shops seeing record internet sales, according to the BBC⁸. At the same time, direct to consumer box-style schemes are booming. Brits are currently spending more than £2 billion every year on subscription services, with the subscription box market estimated to grow by 77% to be worth over £1 billion by 2022⁹.

Table 4 - Some leading African online retailers

Name	Website	Overview
Wosi Wosi	https://wosiwosi.co.uk	Described as the UK's Leading African Online Food Store
Afro Buy	https://afrobuy.co.uk	Online African food shop
JB Supply Store	http://www.jbsupplystore.co.uk	African and Caribbean online marketplace.
John and Biola	https://www.johnandbiola.co.uk	Online African food shop
Olumo Foods	https://www.olumofoods.co.uk/store-pickup	African specialist with Caribbean listings.
Samis Online	https://samisonline.com/?v=79cba1185463	World food specialist with four stores in North of England.
Blue Mountain Peak	https://www.bluemountainpeak.com	Established world food delivery service and wholesaler.
Ethnic Mixx	https://www.ethnicmixx.com	Individual country stores - while Sierra Leone not present this could be proposed.
Afro Carib	http://www.afrocarib.co.uk	Long-standing online African store.

Source: Author

As evidenced by table 4, there are a number of online retailers of various sizes offering African produce direct to the door. While turnover is not available as they are private companies, given their niche positioning volume of sales is likely to be low and supply chain information unavailable. Listings with such retailers can be acquired directly, and could be key in targeting diaspora in and around major cities, in particular London. Supplying such outlets initially could be a key way to testing the market and building supply chains if new to UK sales.

For ambient goods in particular, Amazon also provides an accessible entry point that could be managed from abroad. Their purchase of Whole Foods and deal with supermarket Morrisons in 2019 was a clear sign of intent to access the grocery market¹⁰, and given the ease with which listings can be achieved and managed, as well as their potential to hold stock and carry out fulfillment and access to a vast consumer base, there is potential. Any listing would not be a guarantee of sales however; various marketing activities would be required and would therefore mainly be used as a supplementary source of sales.

Routes to market - foodservice/hospitality

Foodservice and hospitality have been analyzed together for the purposes of this report because they are accessed via the same routes and supply chains.

Made up of over 362,679 outlet types¹¹, from travel and leisure hubs through to hotels, universities, pubs, bars and beyond, the food service industry is not only fragmented, but also a complex environment that meets hugely varied consumer needs, from institutional dining in hospitals and schools, through to fine dining restaurants, street food stalls and contract caterers. As a result it is dominated by wholesale, mainstream brands and private label goods, with a total wholesale food and drink value of approximately £13bn¹¹.

For cassava products, appeal will be centered around free-from and speciality caterers and/or restaurants who use cassava flour in particular as a baking ingredient, including specialist African caterers, food stalls and/or restaurants and cafes. These entities will once again buy direct and in bulk from similar wholesalers previously mentioned, although a few will buy direct from source at the high end.

It should be noted that at time of report writing the food service had been decimated by the coronavirus outbreak, and that few physical sites had opened. Given the volatility of the market therefore it is recommended that it is not targeted directly at this stage.

1.3. Points of Entry

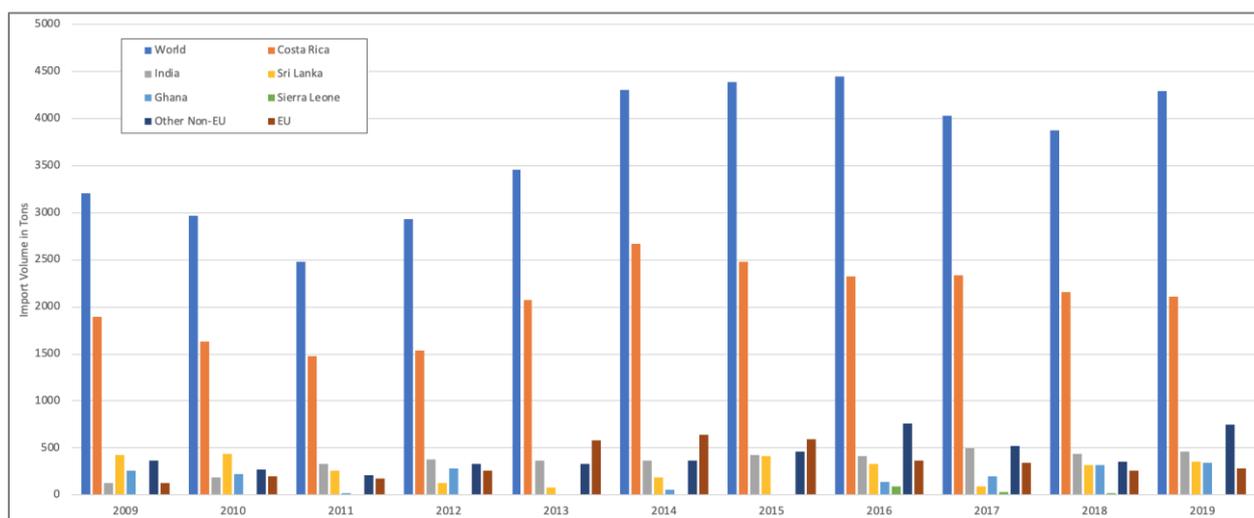
While there are limits to monitoring the import of finished goods such as cassava chips due to a lack of individual HS code, for raw and semi-finished products there is considerable insight into supply chains using UN Comtrade data¹. Each individual product and its routes into the UK will therefore be individually analyzed to build a picture of supply chains.

071410: Fresh, chilled, frozen or dried roots and tubers of manioc (cassava)

As evidenced by figure 5, imports of cassava under this code have been growing for the past decade, while trade with Sierra Leone has occurred since 2016, albeit in low volumes.

The majority of produce is sourced directly from the country of origin, with very little secondary trade via Europe since 2008 which is important to consider when building supply chains.

Figure 5 - List of supplying markets for fresh, chilled, frozen or dried roots & tubers of manioc (HS 071410)



Source: UN Comtrade¹

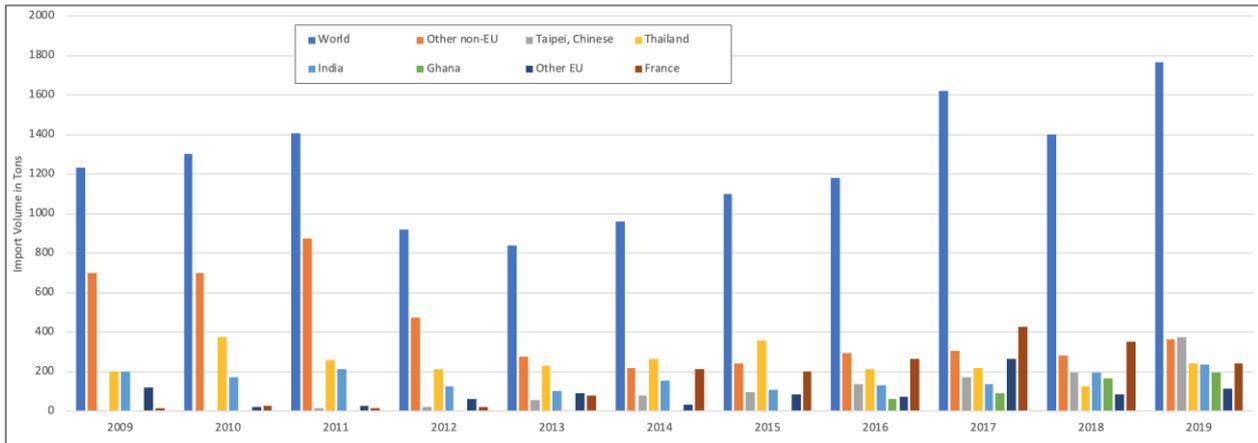
As previously noted, the majority of imported product comes from Costa Rica, although their market share is declining. Ghana represents the largest African market, while India's exports are increasing, albeit slowly.

190300 Tapioca and substitutes prepared from starch, in the form of flakes, grains etc.

As shown in Figure 6, imports under this HS code have also been gradually increasing year on year since a 2013 low. This coincides with the emergence of Chinese Taipei/Taiwan as a direct exporter, while a large proportion of the commodity moves via France, where processing/packaging will be occurring. No imports have arrived from Sierra Leone in the past decade, although Ghana has emerged in the last four years showing a small but significant demand for African produce.

While this market is considerably smaller than that of cassava, it does represent a more well-known product in Great Britain, with ‘tapioca pudding’ mentioned in many ancient recipe books and pearls featured in most supermarket baking aisles as a result². A ready-to-eat canned variety is also available from Ambrosia, a large UK pudding manufacturer³. A proportion (mainly starch) is also used in the manufacture of animal feeds⁴.

Figure 6 - List of supplying markets for Tapioca & substitutes prepared from starch (HS 190300)



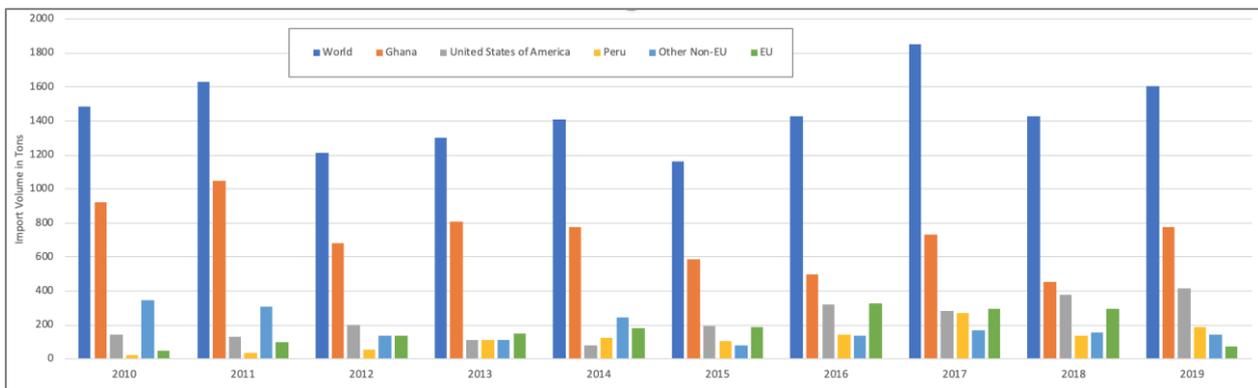
Source: UN Comtrade¹

110620 Flour, meal and powder of sago or of roots or tubers of manioc, arrowroot, salep etc.

Imports under this HS code have been relatively steady over the past decade, as displayed in Figure 6. The majority of imports are sourced from Ghana, which, in the opinion of the report authors, will be due to their milling and packaging capabilities that allow the country to fulfil contracts with specific demands, such as are commonplace with private label.

It should also be noted that this HS code combines a number of different root/tuber commodities, which may have fluctuated individually over the course of the data sample. Regardless, the dominance of Ghana is evident, as is the influence of the United States, where the cassava and free-from market is much larger.

Figure 7 - List of supplying markets for Flour, meal & powder of sago or of roots or tubers (HS 110620)



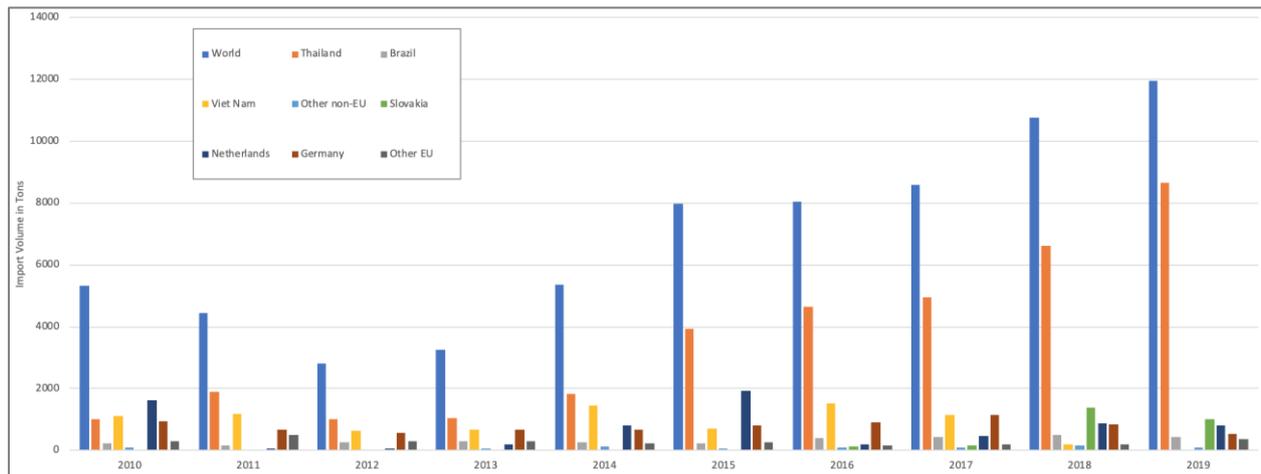
Source: UN Comtrade¹

110814 Manioc (cassava) starch

In 2019, the import value of cassava starch into the UK was almost £7.5 million, an increase of 15% from 2018. Dominated by Thailand, import origins can be seen in figure 7, but this is a market in a considerable growth stage, a feature expected to continue⁵.

The surge in the number of health-conscious consumers around the world is expected to spur demand for cassava starch, while the expansion of the textile industry could also simultaneously aid the expansion. Production of such a product could offer potential for high volumes, as could supplying producers in EU countries with raw product such as Slovakia, Netherlands and Germany.

Figure 8 - List of supplying markets for Manioc (cassava) starch (HS 110814)



Source: UN Comtrade¹

1.4. Consumer Preferences

World Foods are a growing niche

Given its importance as a staple food crop in Africa, cassava is increasingly relevant as a world food product. The market for ethnic food and drink has for some time been one of the fastest growing sectors in the UK and has enjoyed continued, strong growth. The overall ethnic foods market recorded a 32% increase in value sales between 2008 and 2013 to reach a total of £1.4 billion, and growth has continued since then. New product development, finished products and increased visibility in supermarkets have fuelled growth over the past decade¹.

West African cuisine in particular has been touted as an emerging presence in the UK for the past two years², and has seen significant interest of late, with flour alternatives in particular being highlighted as a potential boom industry for 2020 by many reputable sources³.

This growing demand could be in part due to the increasing size of the African diaspora in the UK, but does also indicate some movement towards mainstream.

The Free From movement has seen shifts in consumption patterns

Estimated to be worth £837 million in 2018, the UK free-from market has seen sales grow by 133% from 2013 to 2018⁴.

The percentage of food and drink launches featuring low/no/reduced allergen claims has increased from 12% in 2014-2015 to 16% in 2018- 2019⁵.

Gluten-free products remain the nation’s most popular type of free-from food with 27% of consumers having purchased or eaten these over a six-month period⁴. Cassava flour in particular could therefore be destined

for considerable growth in this sizable niche, although barriers do remain compared to other flours such as awareness and education of its uses.

Brits love healthy snacks.

Entrenched in British culture is the need to snack, and cassava could have a growing role in such a context. A recent survey of 2,111 consumers⁶, commissioned by The Grocer and carried out by Harris Interactive, showed younger consumers are far more regular snackers than their older counterparts. Among the 25 to 34-year-old age group, 86% said they snacked at least daily, and 21% snacked as often as three times a day. By contrast, 65% of the over-55 age group reported snacking at least once a day. Only 6% said they snacked three times a day, and 8% said they didn't snack at all.

Crisps were the fourth most popular snack variety, while health was the second-most important consideration after taste. Cassava crisps/chips, so popular in the United States, could offer innovation in this growth category.

Veganism is more than a trend in the UK

Sainsbury's Future of Food Report⁷ released in 2019 outlined its expectations that a quarter of all British people will be either vegan or vegetarian by 2025. This is up considerably from the one in eight that currently identify as so, showing the expected trajectory of this lifestyle trend. Alongside this, the same report expects half of Brits will identify as [flexitarians](#) by the same date, up from just one in five in 2019. This is based on the supermarket experiencing a 24% increase in online searches for vegan products, and a 65% increase in plant-based sales year-on-year, as customers increasingly consider a vegan, vegetarian or flexitarian lifestyle.

Younger generations drive premiumisation

Across the board younger generations are consuming less, but value higher quality and ethical produce. Surveys have shown they are also more willing to pay a premium for such produce, and try new brands and innovations, as displayed in figure 9⁸.

This lower volume, higher quality push is also driven by health and wellness considerations, which have been a key trend for almost a decade in Western markets. The food service industry shows similar patterns, although ethical considerations are less pertinent as brands have reduced visibility in terms of the end consumer.

Such premium products often find a more open sales channel via gourmet stores, organic supermarkets and Fairtrade stores, as well as World Food stores who often stock a wider range of what are still niche products compared to supermarkets⁹.

New routes into the home

Direct to consumer box-style schemes are booming. Brits are currently spending more than £2 billion every year on subscription services, with the subscription box market estimated to grow by 77% to be worth over £1 billion by 2022¹⁰.

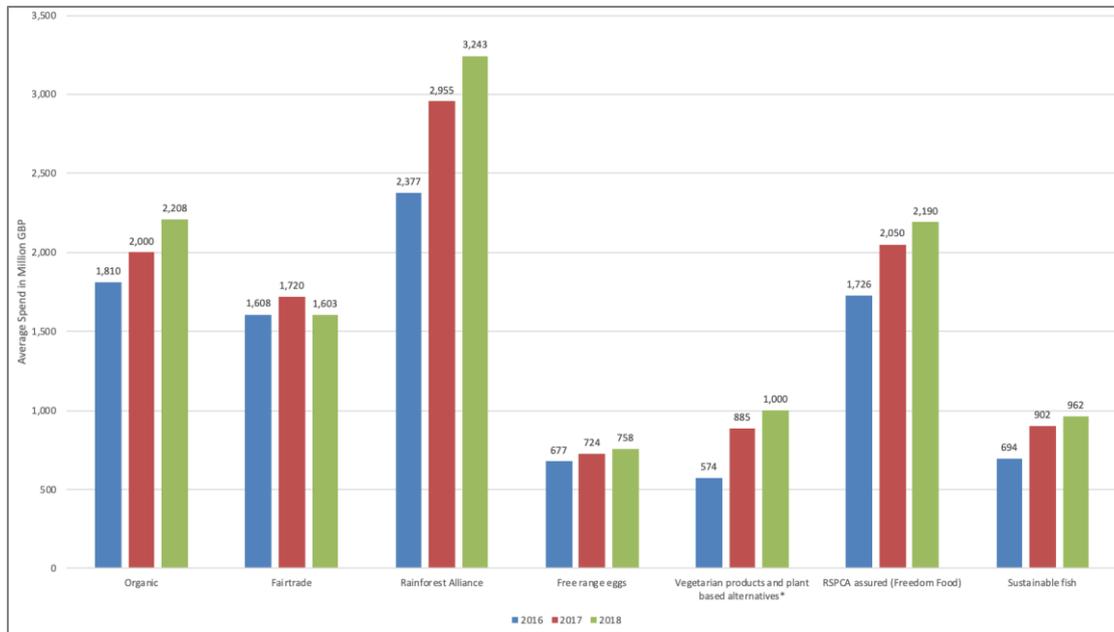
More than 1 in 4 Brits (27.4%) were subscribed to at least one subscription box service in 2018, with subscriptions most popular amongst 25-34 year olds, with over half (52.1%) signed up to at least one service¹⁰. In 2019, food accounted for 37% of all subscription boxes shipped by the Royal Mail¹¹.

Ethical consumption

To the younger generation in particular, eco is ego and there is a strong sense of support for farmers with consumers willing to pay a premium for what they consider just consumption. Ethical consumption has grown fourfold over the past two decades. According to a recent report by Ethical Consumer and The Cooperative¹², in 1999 the total size of ethical consumer markets in the UK was just £11.2bn. Today, on a conservative basis, the figure is almost four times that at £41.1bn.

A large portion of that growth is in food and drink, with an annual spend of £12bn last year compared with just over £1bn in 1999. Per household this equates to £448 per year on ethical food and drink, compared with just £48 in 1999. While there is still work to be done, it shows that UK consumers are sympathetic to ethical messaging. The increase in spend was also split widely across a number of widely available certification schemes, as displayed in figure 9.

Figure 9 - Ethical food and drink average household spending in the UK 2016-2018



Source: Tridos Bank, Ethical Consumer¹²

It should be noted there are limitations to the research that has formed figure 9; specifically that a number of products have multiple certifications, and there is no indication as to whether data of this type is merged or duplicated, for instance if an organic Fairtrade product purchase is factored into both columns. Despite this, clear trends can be observed. Given that the majority of cassava flour on sale in particular is organic, certification schemes in farming methodology should be considered for future growth. A strong story alongside the right certifications could allow Sierra Leonean produce to penetrate a number of valuable niche markets.

Brexit and Coronavirus pose a threat to consumer trends

While the ethical market has continued to grow year on year, it has done so in the context of a growing economy and rising employment levels.

The combined effect of Brexit and the Coronavirus pandemic in 2020 could have a significant effect on consumer spending. A significant and long-lasting recession is likely and it is expected to be global¹³. Previously cited research by Mintel¹⁴ revealed that cost is already a significant barrier to ethical purchasing, with seven in ten UK adults saying that eating sustainably/ethically is harder when money is tight. In the midst of a deep recession, these considerations and sympathies are likely to be tested to their limits, and any company and/or brand that can provide ethical re-assurances at a competitive price point is likely to be more successful.

1.5. Market Trends and Positioning

With the UK increasingly trend focused, any product targeting a specific niche will need to be carefully positioned in order to maximize the potential for success in a fierce and crowded marketplace. The following recommendations are based on current information, as well as existing knowledge of the UK retail market.

There are also some recommendations based on the US market, as trends here are often mirrored in the UK three to five years later.

1. Organic

Organic attracts a premium and with certain cassava products it is considered a standard, particularly in the case of flour. In many cases organic certification is displayed alongside one of the other main certification schemes; Fairtrade and/or Rainforest Alliance. Any organic produce is inevitably considered premium by UK consumers, so positioning would be similar.

As previously mentioned, the organic market has continued to grow year-on-year, and the coronavirus has led to a spike in demand for certified produce¹. While certification is expensive and a long-term project, it should be a serious consideration for any current producer looking to export to Europe and/or the UK.

2. Sustainability/Ethically focused

Fairtrade and Rainforest Alliance are increasingly popular with younger generations, and so any ethically/sustainably focused product should look to appeal to this segment with clear messaging that puts across the USPs in a succinct fashion.

Packaging should be responsible if possible; fully recyclable, biodegradable, plastic free etc. It should also have a natural feel to it, such that it conjures up images of the country of origin. Origin specific ranges are also likely to perform well under a wider sustainability umbrella.

3. Free From

Statistics in section 1.4 showed the strength of the Free From movement. Cassava flour and garri could be set to capitalize with the right message and brand positioning, although the latter is considered a staple of world food markets only and so is less accessible to a wider consumer base.

4. Health and wellness

Cassava chips (crisps in the UK) are commonplace in the USA, with an example of a leading brand displayed in figure 10. Cassava has become positioned as naturally grain free, gluten free, and nut free; all messages that would resonate with UK consumers. Quinoa and chickpea chips are staples in many UK multiple Free From aisles, so the USA situation offers considerable weight to the argument that such a product could work in the UK. Should such a product be considered a processor could be found in the UK, offering potential value addition for any producer in Sierra Leone.

Figure 10 - Examples of Cassava Root Chips available in the USA.



Source: Plant Snacks²

5. World Foods

As previously seen, West African food has become increasingly popular, with a large diaspora located in and around London, a consumer with a more varied palette than ever before, and a number of retail outlets and wholesalers able to distribute such produce. Many wholesalers, including Surya Foods previously mentioned, supply a number of supermarkets, while cassava products are also available in Bookers, a large wholesaler to convenience stores owned by Tesco.

These retail operations are backed up by an increasing number of well-regarded African restaurants, particularly in London³.

6. Frozen and long life

The pandemic has also seen considerable changes in purchasing habits, which could have a lasting effect on behavior, particularly amongst younger generations. According to research by Mintel, 37% consumers believe that, in the future, people will buy long-life food and drink (e.g. frozen products, UHT milk, tinned food) more often as a result of the COVID-19 outbreak, rising to almost half (47%) of Gen Z and Millennials (45%)⁴. At the same time, one in seven Brits (17%) has eaten more tinned food since the outbreak, rising to a quarter of Gen Z and one in five Millennials.

Sales of frozen food are also up almost 20% on last year, according to Kantar Worldpanel, showing a continuing desire to keep food well stocked. Given the continued threat of a second and even third wave of the virus and potential lockdowns that may follow, it is logical to assume that this behavior may last into the medium-to-long-term⁵. For cassava products this represents an opportunity to supply frozen chips, as already on sale via ASDA⁶.

1.6. Other Market Opportunities

1. Product diversity

While the majority of trends were discussed in the previous section, one that was missed was the non-food segment. There is opportunity to supply cassava and tapioca starch to many other industries that lie outside of the expertise of the authors of this report. These include pet food manufacturers, textiles applications and more. Should non-food applications be considered, the authors would recommend a secondary appraisal by a specialist team as it lies outside of their knowledge base.

There is also the opportunity to supply frozen produce, as outlined in the previous section. Currently cassava chips are sold frozen in a number of outlets, including ASDA and Bestway wholesale, while leaves come via specialists. Taj Foods supply the majority in 1kg bags.

2. Packaging

The UK's relationship with plastic is in transition. Increased consumer awareness regarding the environmental impact of single use in particular has led to the UK Government consulting on a plastic packaging tax¹.

Any product launched and/or imported over the next five years will therefore be expected to address these concerns, with any product ignoring this consumer preference likely to suffer. According to a survey by YouGov², half of Britons (46%) feel guilty about the amount of plastic they use, and even more (82%) are actively trying to reduce the amount they throw away.

This could provide an opportunity for cassava producers to invest into packaging innovations using different parts of the plant. This would provide a marketable story in terms of reducing waste and utilizing all parts of the plant e.g. leaves.

3. Private Label.

The UK has a high adoption rate for own-label and this continues to grow. Many natural products and world food distributors are looking to expand their ranges, as are established retail stores and supermarkets. This provides a bulk outlet, however often buyers want packaging done at source. Should this be possible, there is potential for high volume contracts supplying all manner of importers, distributors and retailers. Should packaging not be possible then packing partners could be found in the UK, or certain distributors may be able to do it on behalf of the producer.

1.7. Packaging Recommendations

Packaging recommendations are almost entirely dependent on target market. When targeting the speciality end of the market, plastic is becoming increasingly challenged in line with trends in the UK to ditch single use plastic, where possible.

Raw / Semi-Finished

Despite this, reseal-able and non-reseal-able plastic bags are common packaging options across speciality and mainstream retail.

Figure 11 - a selection of prepackaged own label cassava finished products in the UK.



Source: Various

Some natural product distributors and brands in the UK are focusing on compostable packaging in line with current trends in plastic reduction, but it is yet to be widespread. The above examples (Distributor / Retailer / Brand) may pack themselves, use a third party co-packer or receive goods that are packed at source.

Certain products may work in alternative formats. Flour could work in glass jars or cardboard boxes which are viewed more favorably than plastic packaging. This approach could be a good differentiator as plastic is increasingly less favorable, especially with customers who align with trends who could be a target for speciality / trending products.

The main take home will be that most bulk importers will have their own preferred packaging requirements. Having flexibility to allow adaptation will be key to accessing as many contracts as possible.

Summary: Currently a very plastic-centric category, but potentially due for innovation in line with packaging trends and consumer preference.

1.8. Labelling Considerations

Labelling will depend on the product, type of packaging and end usage. In general use English for labelling purposes, unless your buyer indicates otherwise. Include the following for bulk packaging:

- Product name (e.g. cassava flour)
- Batch code
- Whether or not the product is destined for use in food products
- Declaration of allergenic substances
- Name and address of exporter/country of origin
- Best-before date
- Net weight
- Recommended storage conditions

For cassava you must include preparation instructions:

- Cassava must not be eaten raw (bitter cassava);
- Cassava shall be peeled, de-pithed, cut into pieces, rinsed and fully cooked before consumption (bitter/sweet cassava);
- Cooking or rinsing water must not be consumed or used for other food preparation purposes (bitter cassava).

You must follow these legal requirements applicable to food ingredients and vegetable oils specifically:

- Traceability, hygiene and control
- Erucic acid content:
- Extraction solvents
- Food contact materials
- Food Safety Certification: In addition to HACCP, certificates such as [IFS](#) or [BRC](#) might be required by some buyers.
- Corporate responsibility and sustainable sourcing certification.

Bulk labelling is often basic and includes the key requirements (Title, contact details, batch number, expiration date, certifications, product code). An adhesive label on a plastic bag is a common application for bulk customers.

Figure 12 - an example bulk 25kg plastic bag of tapioca flour sourced from Vietnam.



Figure 13 - an example bulk 25kg paper bag of cassava flour sourced from Brazil



Samples are a must and should be labelled with 'Sample product - not for resale. This will prevent duty having to be paid on the product by the recipient. Samples need be no more than 50 - 100g, packaged neatly with a clear label and accompanied by marketing materials.

1.9. Certification Analysis

The following outlines certifications and awards that are used by profiled brands and aligned with cassava brands in general.

Table 5 - Examples of potential certification schemes

	<p>Soil Association</p> <p>As a UK organic certifier they regulate both domestic and international brands and have headquarters in Bristol, UK. One main difference between this and the EU mark below are unannounced annual audits of farmers / producers who use the certification. The logo is carried on 70% of organic products in the UK.</p>
	<p>EU Organic</p> <p>The EU standard for organic labelling is via the EU leaf. It is often used alongside the UK certifier logo such as the above. There is increasing concern of dual organic legislation becoming reality due to ongoing Brexit negotiations and questions of the use of this mark in the UK. Brands should have dual logo (UK/EU) inclusion until further notice.</p>
	<p>Fairtrade</p> <p>As a widely recognized symbol for good on the shelves, traditionally in natural product stores but increasingly in multiples, Fairtrade is seen as a powerful mark and particularly well recognized in the UK.</p>
	<p>Rainforest Alliance</p> <p>The Rainforest Alliance encourages businesses and consumers to support sustainable agriculture by sourcing or choosing products grown on certified farms. Permeating entry level products in supermarkets through to speciality products in higher end stores.</p>
	<p>Vegan Society</p> <p>The Vegan Society are the certification body in the UK for the Vegan logo, relevant to chocolate bars who omit dairy from production. As the UK moves to an increasingly vegan consumer base, the prominence of this mark should not be understated.</p>

	<p>Great Taste</p> <p>A well-recognized food and beverage award in the UK, notably for speciality and fine food establishments such as delicatessens and farm shops. Participation is via membership.</p>
 <p>compostable</p>	<p>Commercially Compostable</p> <p>For packaging to be commercially compostable it must break down to a sufficient level within 12 weeks under commercial composting methods. This is different to biodegradable which doesn't have a fixed timeline.</p> <p>In the UK, the Association for Organics Recycling works in cooperation with the German certification body Din Certco, using the stamp to the left which abides to BS EN 13432 compost ability criteria.</p>
	<p>A Plastic Planet</p> <p>A trust mark that appears on plastic free packaging and currently used by some products in the UK. An emerging certification.</p>
	<p>Carbon Trust</p> <p>The Carbon Trust Standard recognizes organizations that follow best practice in measuring, managing and reducing their environmental impact. An emerging certification.</p>

Certification Impact Scale

To further guide choices on certifications and awards, a piece of research to assess the impact of such certifications on consumers in the UK would be recommended, via a survey at a selection of natural product stores. In addition, a corporate impact scale could assess the thoughts of B2B customers.

1.10. Standards and Memberships

Standards, Certificates and Accreditations

Requirements will vary according to customer, so not all would be required simultaneously;

- Certificate of Analysis
- Ocratoxin A Analysis
- GMO Statement
- Aflatoxins Analysis
- Contaminants Analysis 2019
- Low Cadmium Content
- Acrylamide Statement
- Contaminants Statement (EU)
- Gluten Free Declaration
- HACCP Statement
- UTZ
- Organic
- Vegan
- BRC - British Retail Consortium
- IFS - International Food Standards
- FSSC22000 (Food Safety System Certification)
- SQF (Safe Quality Food Programme)
- Certificate of Origin
- GLOBALG.A.P.
- Material Safety & Data Sheet
- Product Specification (Nutritional Values)
- ISO 9001:2000 (Quality management system)

Memberships

For a cassava brand in the UK, we would recommend considering the following memberships:

Organic Trade Board (OTB): An independent trade body promoting organic practices with a wide variety of members across brands, retailers and producers.

Soil Association - Business Circle: Alongside being a certifier, the Soil Association has advanced partnerships with companies who sign up for their Business Circle initiative.

Food & Drink Federation: Representing a wide variety of food and drink businesses in the UK, they provide insight on food safety, innovation and legislative practices.

1.11. Recommended Customer Targets

The following table outlines both a short and long-term list of recommended potential customers, as well as a brief breakdown of what will be required to access them.

Short Term

Based on the research carried out initially, the main recommendation involves growing presence in the World Food sector, as this will provide initial volume without additional pressure on quality of product, or requirement for any further certifications. Once embedded in such a distributor, a partnership may be possible to add new lines/increase volume etc. This will need to be explored on a case-by-case basis. Given cassava and its value-add products are still a relatively unknown quantity in mainstream, this represents the single market available at this time.

Table 6 - List of short-term targets in the World Food sector

Name	Sector	Products	Requirements for sales process.
Surya Foods	World Foods	Bulk, branded & private label	Smaller sample bags, sales literature. Consistent quality.
Mac Philips	African Importer & Wholesaler	Bulk	As above.
Abi Global Foods	African Importer & Wholesaler	Branded, bulk & private label	As above.
Tropical Foods Logistics	African Importer & Wholesaler	Bulk	As above.
Akoma Foods Ltd	African Importer & Wholesaler	Bulk	As above.
TK Foods	African Importer & Wholesaler	Bulk	As above.
Maggie's Exotic Foods	African Importer & Wholesaler	Branded, bulk & private label	As above.
Wosi Wosi	African importer and online D2C retailer	Bulk, private label	As above.
Olaiya African Food Store Ltd	African importer and online D2C retailer	Bulk, private label	As above.

Source: Author

It may also be possible to explore partnerships with direct to consumer schemes and sites, in particular those selling African produce. The most prominent of these were outlined in table 4, section 1.2. These could be approached directly, although many will already have existing supply chains in place and so a point of difference will be required.

Long term

With Free From growing as a market and the use of flour in homes exploding thanks to the coronavirus outbreak, the natural and whole foods market represents a significant sector where value addition will be possible and cassava products show the most growth potential. It is recommended to consider Rainforest Alliance, Fairtrade or Organic certification before pursuing such avenues, as well as investment into packaging options to allow private label contracts.

Due to the independent nature of this sector, many stores are supplied by distributors/wholesalers, as with World Foods. It is therefore recommended pursuing contracts with some of these organizations, although a sales agent would be advised due to the complex nature of UK business negotiations. Recommended targets can be seen in table 7.

Table 7 - List of long-term targets in the natural and whole foods sector

Name	Type	Products	Requirements
CLF Distribution	Natural and Organic Distributor	Bulk, branded & private label	Packaging, labelling, organic cert.
Tree of Life	Natural and Organic Distributor	Bulk, branded & private label (ambient only)	Packaging, labelling, organic cert.
SUMA	Natural and Organic Distributor	Bulk, branded & private label	Packaging, labelling, organic cert.
Essential	Natural and Organic Distributor	Bulk, branded & private label	Packaging, labelling, organic cert.
Infinity Foods	Natural and Organic Distributor	Bulk, branded & private label	Packaging, labelling, organic cert.

Source: Author

1.12. Initial Recommendations

Based on initial research, the following recommendations are made to access the UK cassava market.

1. World Food importers/wholesalers represent a clear route to market

The likes of UK African wholesaler Jumbo represent an access point to a growing market in world foods here in the UK. There is considerable scope to initially access and then increase this presence with a considered sales strategy. A number of specialist importers and distributors exist in the UK, catering to a growing diaspora and an increasing demand for West African produce outside of this minority group. Direct to consumer websites should also be considered, and were outlined in the previous section.

2. Value add products open up new markets

Cassava starch represents the single largest growth market investigated while tapioca (starch and pearls) is steady and has a historic marketplace in the UK. Cassava flour, rather than garri, would allow entry into free-from, natural and organic (with relevant certification). Garri, although imported and sold, is a product limited to the African diaspora market due to a lack of awareness by UK consumers. Cassava flour would open up entry into the growing snack market, where products such as chickpea and lentil flour, as well as chips have started to infiltrate mainstream.

Diversification of product offerings will increase the scope of the target market, opening up non-food producers as well as further niche and European markets. Frozen produce should also be a consideration,

extending shelf life and so minimizing liability while targeting a market that has received a boost during the pandemic.

3. Expansion of packaging options would also remove barriers

While many importers will re-pack themselves after being supplied in bulk, being able to package on request in the country of origin will allow value addition. Simple sample packs of around 50-100g are required to instigate sales conversations, and private label contracts prefer to package at source in general.

4. Relevant certifications may allow further value addition and open up new markets

While organic certification is a lengthy and costly process, other ethical considerations such as Rainforest Alliance are a hugely popular pull for UK consumers, and that is only increasing. While this will be less relevant to a World Food producer, it should be considered in the medium to long term in order to access markets outlined in recommendation two.

There are also considerations with regards to quality. The global export market has considerable requirements when it comes to lab testing, process management etc., and these should be key when building an export strategy.

PART 2: UK CASSAVA MARKET ENTRY STRATEGIES

2.1. Stakeholder perspectives

Given the infancy of cassava as a product in terms of the UK food and drink industry, it is important that in order to build trade relations and build entry strategies producers, processors and exporters are familiar with the demands of the international export market, as well as those specific to the UK.

Furthermore, any in-country barriers to accessing that market, be it processing, certification or otherwise, must be identified, as well as potential solutions.

General Considerations

Sierra Leone gained independence from Great Britain on 27 April 1961, following British colonization in the late 18th Century¹. Its more recent history has seen a long civil war (1991 - 2002) which displaced over a third of the country's population, and the shadow of which has taken considerable time to emerge from. In March 2014, the closure of the UN Integrated Peacebuilding Office in Sierra Leone marked the end of more than 15 years of peacekeeping and political operations in the country².

The country was also hit incredibly hard by the Ebola outbreak of 2014 and 2015³, with a sharp rise in cases leading to a significant drop in gross domestic product (GDP)⁴. In 2017, increased iron ore exports, together with the end of the Ebola epidemic, supported a resumption of economic growth which the IMF had predicted to continue before the coronavirus outbreak of 2020^{2,4}.

In 2018 Sierra Leone was the 150th largest economy in the world in terms of GDP, exporting \$677M worth of goods and importing \$1.03B⁵. This resulted in a negative trade balance of -\$355M. Looking at those exports, the most exported product by value was titanium ore followed by rough wood, diamonds, aluminium and non-fillet frozen fish. Cassava exports totalled just \$15,600, all of which was exported to the United Kingdom.

Delving further into the country's economy, more than three-fifths of the population engage in agricultural production, primarily for the domestic market but some also for export¹. Cassava is an important part of this sector, and with consumption growing in both the UK and USA there is opportunity to increase export production. Production of the commodity has been steadily rising since 2002, reaching almost five million tons in 2017⁷. After rice, it represents the second most important crop to the Sierra Leonean population, according to stakeholder conversations.

In terms of trade, Sierra Leone was one of the first countries to engage with the UK in a free trade agreement post Brexit. This is important as any agreements made under current EU stipulations will be unaffected by Brexit, as long as supply chains are direct and not via Europe.

Individual conversations

Individual conversations with stakeholders at various points in the supply chain have revealed various insights into the cassava market in Sierra Leone.

1. CAC Holdings

One particularly insightful conversation with the export manager of CAC Holdings, a large processor and exporter of palm oil and garri revealed the country has been almost completely shut down by COVID-19. Production capacity has plummeted, but the company in question was looking to re-open toward the end of August.

The stakeholder felt that Sierra Leonean enterprises were currently being out-competed by other West African countries, who due to economic strength could import raw cassava to keep up with demand should there be any shortages.

The company's main outputs were cassava-based: garri, flour, dough and leaves all of which were sold bulk in 20kg bags. Capacity to pack was limited, and this would be an area they would like to expand if recommended by the report, as currently there was a reliance on Ghana for packaging.

The company currently had one UK contract to supply Jumbo, a London-based specialist African wholesaler, and at time of call had made contact with Wanis, but were unable to send samples due to a lack of packaging availability.

Volume of supply was approximately two containers per month to the UK across both cassava and oil palm, with cassava/garri selling at £11.50 per 20kg bag. There was considerable interest in increasing UK presence, and they required further market insight to understand where investment would be required to achieve this. There was also a request to understand whether moving into frozen would represent a market opportunity; supplying whole containers of leaves, dough etc. There had been previous business with the USA but this has stopped, with reasons not specified.

In the opinion of the interviewee, the main issue to achieving an increase in export volume was quality of product. The interviewer was informed the cassava being harvested was currently of poor quality, and was incredibly variable due to the processor working with a large number of individual and small hold farmers who produced crops of varying quality. Currently shipments are certified with standards and quality by the board before they leave the country, with the processor and/or farmers holding no recognized individual marks.

The need for continuity in the UK market will therefore be investigated and explored in full, as will the necessity of certifications.

2. Lion Food

Conversations with the manager of Lion Food, a large agro-processor, revealed that the company was making steps towards accessing the export market, including implementation of ISO 9001 for quality management, a key standard for such activities.

When it came to cassava, like CAC they bought cassava directly from farms to convert to garri, maintaining traditional methods and were responsible for one of the key Sierra Leonean brands. White, brown and yellow varieties of garri were available. They were investing in packaging equipment as a way to maintain quality, and had a large facility in Freetown. High quality packaging was currently purchased from the UK.

The company was currently selling solely on the Sierra Leonean market, and at this time were unable to meet demand, producing 10 tons of garri per 90 days in sealed 10kg pouches.

In a bid to expand, the stakeholder had sent samples to the UK to access the considerable Sierra Leonean community, but to no avail. There were plans in motion to work with Amazon, both in the UK and USA, in order to get them holding product and supplying direct. There were logistical challenges associated with exporting to the UK. The costs of shipping changed overnight, while foreign exchange was difficult and could take days. There was a perceived need for something resembling an AGOA agreement, such as that available with the United States, that addresses the imbalance with new competitors such as China.

3. Village Hope Inc.

A not-for-profit agro-processor founded in 2008, conversations revealed that business direction had shifted over the last few years to more profitable crops than cassava such as cocoa, honey and cashew that allowed them to pay farmers a better wage.

Despite this, there was a large processing plant under the direction of the company, primarily producing garri for the domestic market. There was some export to Guinea, but far less since border closure. Flour was possible, but in order to make it a reality changes would be required, which would be expensive and require training.

The stakeholder was clear about the challenges of cassava export. Traditional methods were not possible for large scale production, particularly when it came to flour, which required a flash drier at an approximate cost of \$100,000. The company was exploring grants that could make this a possibility in 2021.

The company was adamant they could meet the demands of any export contract with a reliable supply, but could only give pricing based on volumes required.

4. Village Hope Inc - Northern Sierra Leone

A conversation with a manager of a large processing factory in northern Sierra Leone, affiliated with but not part of Village Hope Inc., identified considerable challenges to accessing the export market, particularly in the north of the country.

The factory was producing 10 tons of garri every day, selling 70kg or 50kg bags to the local market. 70kg typically sold for \$60. In their opinion, they were a long way from being able to access the export market.

The main challenges in the north were both agricultural and market-based. Seeds were difficult to obtain, particularly those of improved varieties that were pest and drought resistant. Local farmers sold product on the market rather than to factories, as they were able to make more with additional labor.

Farming and processing of cassava remained an incredibly manual process and therefore high cost. Tractors were unavailable to move product which made large-scale farming impossible and limited production to small holders, who outcompeted large factories by processing manually and undercutting price-wise on the local market.

Government lockdowns as a result of COVID-19 had also closed markets, meaning no way of selling product.

5. Institutions - Njala University

Conversations were also held with academics involved in the cassava supply chain. There was an identified need for a more sustainable supply chain, with traditional farming methods presenting a considerable bottleneck. This could be overhauled if mechanization was introduced to overcome the demands of certain processing requirements such as peeling, transporting etc.

Farmers also need the correct crop varieties based on demand. Currently there is a market-driven scenario, driven by supply of the domestic market, which had a tendency to be volatile. Given cassava was a one year crop, farmers planted based on immediate demand which led to a very short-term market. There was a need to plan better to meet the demand of a new market, but this could only be invested into with a guaranteed supply. If this could not be acquired then farmers would be forced to continue supplying low-value, short-term domestic markets.

Improvement on quality and on standards was necessary to access export markets, with the interviewed stakeholder involved in the drafting of a general standard; ECOVA, that were proposed to govern garri production.

In the stakeholder's opinion the three top value addition cassava products worth investment were garri, flour and starch, which following considerable research had most potential⁹. A flour policy was coming in from the government to make bread using cassava flour, brought about by an over-reliance on wheat imports. Currently, they were recommending a composite of wheat and cassava.

Another potential for value addition were cassava chips; sliced fresh tuber which was then dried and could be used to make flour, or milled into another secondary product. Given cassava's water content being over 70% this may be one way to access an export market, although it would entail much value addition occurring outside of the country. Currently drying occurred naturally; mechanism would be required if this was to become a more voluminous activity.

The stakeholder was also of the opinion that there were two frontiers in the UK market relevant to Sierra Leonean cassava:

1. Cassava leaves, in particular to the growing community in London.
2. High quality garri, to the same market.

There was also a recommendation for Village Hope; their mode of processing is a USP and would add value in the competitive export market. Cassava was processed within 24hrs and tubers used were at least one year old which gave a high quality, low fiber paste.

6. Institutions - Sierra Leone Agricultural Research Institute

The interviewee outlined that garri was the most produced cassava product, and that while most was sold domestically some was moving out of the country into sub-regions.

In 2018, cassava flour was promoted as a joint project with bakers. Training was supplied, but a lack of machinery (flash drier) and market meant that it quickly faded. If flour was to be produced on a larger scale, there must be a market for it. Production was currently very low, and would continue on a small scale unless exports were targeted.

Going back to garri, production was so high because the market was there. It is a staple in all homes, and as a result is a quick moving product domestically. Quality control remains a very big problem, mainly because much of the economy revolves around sales by individual households, who were able to keep prices very low and undercut larger processing plants but followed their own methods.

From a production perspective, transporting the raw, bulk tuber is a problem. Distance from farm to processing plant is often high, and with a lack of machinery large volumes are near impossible, as is efficient preservation in transit. Labor intensive peeling was also a barrier to reaching export volumes.

2.2. SWOT Analysis

This analysis is based on capacity considerations identified during initial calls with stakeholders and their ability to meet the demands of the market identified in the previous section.

MARKET (STRENGTHS VS WEAKNESSES)	
<p>STRENGTHS</p> <ul style="list-style-type: none"> ▪ Lack of UK market leaders: the majority of cassava and product derivatives are private label through larger importers/distributors. ▪ Story: In the UK, stories sell and a traceable, ethical trend-based product with clear differentiation could captivate. ▪ Growing market: All commodities investigated were in a period of growth which could be capitalized upon, as was the world food market as a whole. ▪ Significant diaspora: large West African contingent are a clear market to target as a primary consideration. ▪ Direct trade: The majority of UK cassava imports were sourced directly from country of origin, cutting out any secondary trade. 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> ▪ Emerging: while this could be an opportunity, the import volumes of cassava and its derivatives are still modest, making any entry small scale initially. ▪ Price point: In an increasingly commercial marketplace any lack of scale could lead to pricing difficulties, particularly when negotiating private label contracts. Concerns have been raised about the ability to compete with larger countries in the region such as Ghana and emerging countries such as China. ▪ Limited UK history: buyers will be wary of being the first to trial a product, knowing there may be supply issues. It will be down to the seller to reassure them, and with a lack of experience operating in the UK market this may be difficult at first.

PRODUCTION (STRENGTHS VS WEAKNESSES)	
<p>STRENGTHS</p> <ul style="list-style-type: none"> Production capacity: Institutional conversations revealed significant farmland, while processing is already occurring at high volumes. Provenance: Being proudly Sierra Leonean could offer a USP and/or point of difference. Experienced: Company owners have considerable experience in the market, as well as in processing which gives the organization considerable strength, particularly with NPD. Existing supply chain: two containers per month were already being shipped to a supplier in the UK by one producer. 	<p>WEAKNESSES</p> <ul style="list-style-type: none"> Variable quality: product concerns were evident in preliminary conversations and these pose a significant barrier to trade. Only one processor mentioned taking steps to achieve standards required to reach the international market. Bottlenecks: traditional farming methods and a lack of machinery prevent production of cassava products at scale. Packaging: Currently supplying 20kg bags only, with no sample capacity. Limited product line: Garri, dough and leaves were priority products. Demand for the latter two is limited in the UK, while garri is limited to the African community, which represents a niche market.

MARKET (OPPORTUNITIES VS THREATS)	
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> Niche: World Food importers offer an obvious, growing route to market. Private Label: The UK has a high adoption rate for own-label goods and this continues to grow. Other than organic flour, cassava lines have yet to be significantly addressed. Ethical: Certification supporting growers and/or empowering women offers clear differentiation and is not available in the UK. Supply chain transparency: UK consumers are increasingly educated about exploitation in the supply chain, with direct trade models increasingly relevant. Finding a processing, packing or distribution partner in the UK willing to work on such a model could provide a strong story and market access. Product innovation: The UK is increasingly trend based and vegan, health & wellness and ethical consumerism provide a multitude of opportunities for any incumbent producer. Cassava is an increasingly 'trendy' product and is relevant in a number of categories. Diversity: Cassava/tapioca/yuca/manioc have a number of different uses across many 	<p>THREATS</p> <ul style="list-style-type: none"> UK Competition: The brand has considerable low-level competition in various segments of the market from other producers but also other products, such as chickpea flour as an example. Market competition: Costa Rica supplies a huge percentage of the UK's cassava, while producers have raised question marks around their ability to compete with larger producers such as Ghana and China. Regulation: Post Brexit and coronavirus, new trade partnerships and certifications present opportunity and threat to all brands and producers. This will be discussed separately towards the end of the report. Changing consumers' preferences: are increasingly fickle, and while high end and independent sales are growing, so are those of the discounters. It will be difficult to predict how this will change in a recession brought about by Brexit and the Coronavirus. Sales experience: UK buyers can be difficult to work with and have certain expectations that will be discussed in the next section of the report

<p>sectors, both food and non-food, meaning any sales approach can be wide-ranging.</p> <ul style="list-style-type: none"> ▪ Brexit: a trade deal is already in place with Sierra Leone, meaning continuity of trade that other competing countries do not have. 	
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PRODUCTION (OPPORTUNITIES VS THREATS)	
<p>OPPORTUNITIES</p> <ul style="list-style-type: none"> ▪ Flour: investment into air-dryers could see Sierra Leonean cassava flour exported to various markets, including the UK. ▪ Garri: while limited to diasporas and niche markets, this product is being produced in large volumes and therefore seems the most ▪ Packaging: Is there opportunity to invest into quality packaging solutions? ▪ Private label: packaging/labelling ability could transform sales conversations. 	<p>THREATS</p> <ul style="list-style-type: none"> ▪ Quality: As mentioned previously, any dip in quality of product will not be tolerated by UK buyers, while without the right certifications it will not be possible to access the export market in the first place. ▪ Lack of scalability: stakeholders have revealed considerable mechanization is required in order to operate on export volumes at a profitable rate. ▪ Production-export disconnect: Farmers react to the local market primarily, and therefore long-term investment or subsidy could be required to access the export market.

2.3. Market Threats

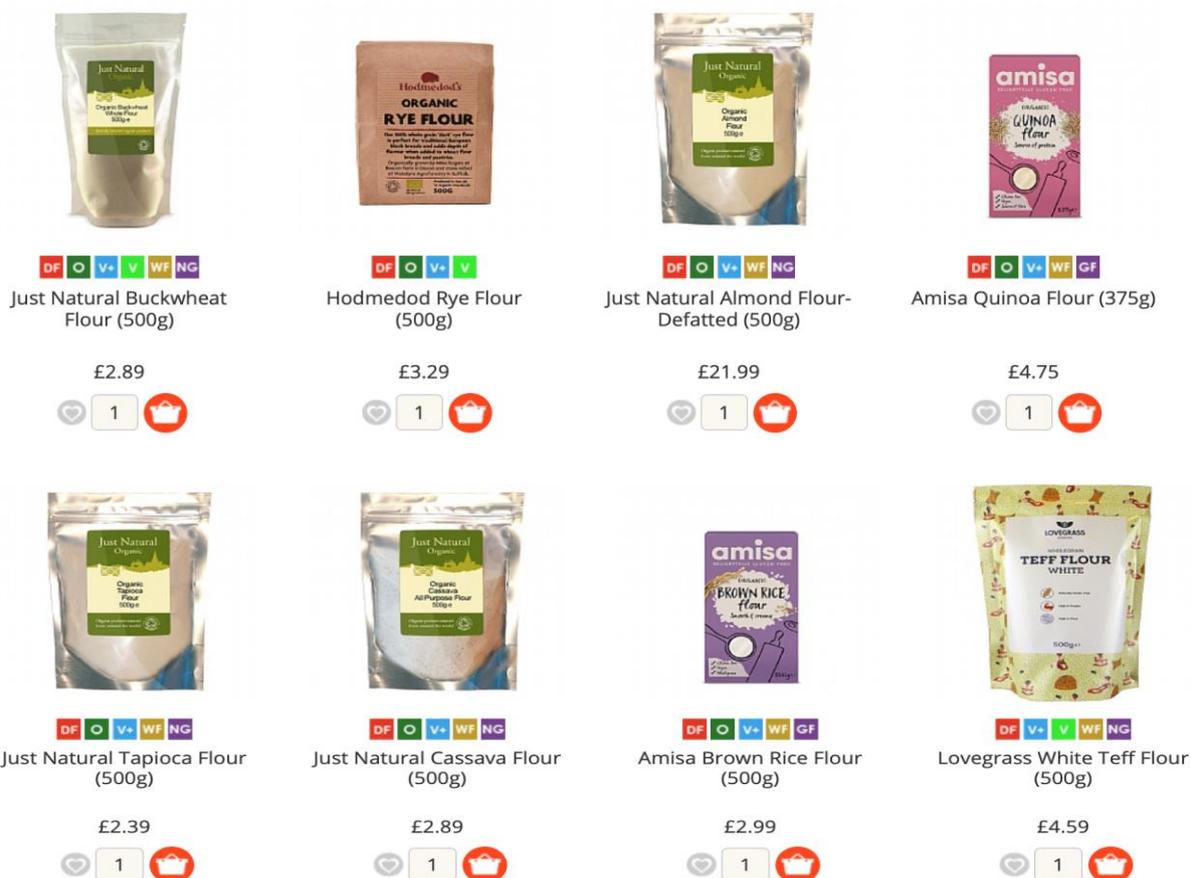
1. UK Competition.

While cassava products do represent a niche, many value add products compete with other brands on the shelf, although in some verticals there is considerably less competition than in others.

When it comes to garri competition is not fierce via niche retail, although a number of private label contracts do exist for the likes of Ades, Island Sun and the distributors and D2C retailers already mentioned.

For flour, cassava would compete with other Free From options, and as already mentioned would currently be most relevant in the natural and organic sector. When examining the range from leading organic retailer Planet Organic¹, figure 14 shows that cassava flour from Sierra Leone could first and foremost compete with other types of flour, as well as brands within.

Figure 14 - Examples of different flours currently on sale at Planet Organic stores in London



Source: Planet Organic¹

Outside of this image there have been rises in coconut flour, chickpea flour etc., with the UK going through something of a home-baking craze during enforced lockdowns that has seen supply struggle to keep up with demand². This only further strengthens the argument to supply private label contracts, potentially in bulk.

Cassava leaves offer little competition, as does cassava starch (although for the latter the market is small), but leaves are generally supplied frozen and only via niche retailers and are a low value product, often retailing for as little as £1.50 per 500g³.

2. Market competition

Competition from other markets is a twofold analysis. Firstly any export project will compete with the domestic markets, particularly given the importance of cassava as Sierra Leone's second-most important food crop. Currently, stakeholder conversations have revealed that the majority of garri is sold for domestic use. Should the coronavirus bring about widespread recession, its importance as a staple food could increase, impacting export potential, while as a short-term crop farmers may need incentives to make long-term changes that do not yield immediate profit.

Secondly, Sierra Leonean products will also compete on the export market with larger producers such as Ghana, Nigeria, Costa Rica and China. Such concerns were raised in various conversations, and as such Sierra Leonean produce will require a competitive price, USP, or considered and proactive sales strategy to compete which could come with a significant timescale.

3. Regulation

While a tariff agreement is in place with Sierra Leone post-Brexit to continue trade as-is, the economic effects of such a move are yet to be seen and are difficult to fully predict, particularly when combined with the volatility of the continuing coronavirus pandemic. Regulatory changes could come into effect following the split, be it labelling or certification, and while the UK Government has been keen to stress a 'business as usual' approach, such uncertainty makes the situation unpredictable. A flexible approach will therefore be required.

4. Changing preferences/lack of market growth

While food trends come and go in the UK, many of those that are applicable to cassava and that have been discussed as part of this report are gathering pace. The rise of the ethical consumer via veganism, sustainability and waste reduction and Free From has become much more than a trend and now, particularly amongst the younger generations, is part of their lifestyle and overall ethos.

There is the potential for over-saturation with regards to sustainability messaging. The rise of certification schemes has led to an increasingly confusing picture for UK consumers, with many unsure what each mark means. Any ethical or sustainable messaging will therefore need to be clear and succinct, as previously noted.

5. Sales experience

UK buyers are busy, and the market is unlike any other in the EU. How to liaise with British buyers and what to present will be profiled in the section on sales considerations, but barriers to maintaining good relations should be addressed, such as the ability to respond to email in a timely fashion, keeping phone appointments etc. Any missed calls or ignored emails will see a swift end to negotiations, even with a valid reason for doing so such as a loss in connectivity. While this could be considered unfair, it is the reality of a crowded and competitive market.

6. Quality

The continuity of product quality is paramount to building long-term relationships with UK buyers and their respective organizations. Any exporter must be able to reproduce their product, and each shipment must be as close to identical in terms of look, feel and flavor as the next. Quality control therefore must be addressed as a priority, as sales volume will not be possible without it. International exports often demand processing assurances in the form of ISO 9001 and/or BRC, particularly if planning to enter multiples. While conversations revealed certain product standards had been drafted, their implementation had yet to be observed.

Any new contracts won will be swiftly lost upon receipt of a single poor batch, and the relationship will likely be irreparable. The importance of this cannot be understated.

7. Lack of scalability

Stakeholder conversations have revealed that mechanization remains the main barrier to accessing many export markets, particularly when it comes to value-add products. This could be in the form of tractors for transport, processors for peeling and/or air dryers for flour preparation. Should large volume contracts be won, it would be imperative that the right tools were in place to fulfil, otherwise such an activity would be damaging long term.

8. Production-export disconnect

As previously mentioned, conversations revealed only one, perhaps two processors who were ready to export, and those were unable to commit to volumes and pricing without seeing a contract. Others lacked certification, scalability and/or the ability to invest, and so were trapped supplying a volatile domestic market.

Any export contracts will take time to mature, and samples of product will be required, as well as proof of certifications, etc. before the contract is signed. Efforts must therefore be made to bridge the gap between the expectations of the export market, and the realities of domestic production.

2.4. Competitive Considerations

The following are competitive considerations for launching a brand or engaging buyers.

Bulk / Pre Packaged Ingredients

UK buyers will of course want a competitive price on imported products they process, pack and sell themselves. The margins on retail packaged bulk ingredients can be high, especially if the importer has value adding certifications. For emerging customers, such as those starting to sell cassava ingredients under natural / wellness trends, they may not have many sources to consider when choosing a cassava supplier and may buy from UK domestic suppliers as they cannot warrant container loads shipped from origin. Quality will be important and depending on the size of customer, varying levels of standard and certifications will be expected, such as BRC, ISO etc.

Bulk / Finished Product

Not many options exist in the UK but we can learn from the USA about potential openings. For example crisps / chips, bread and pasta can be created from cassava and could be emerging products in the future. There is potential to start supplying cassava to fuel these trends, so competitive pricing and quality will be key measures. Targeting bakeries, restaurants and existing brands could be a valuable way to assess the market, offering samples and recipe ideas along with dietary benefits and trend analysis. Much of the selling will have an information focus to enlighten buyers who are possibly new to cassava.

Branded / Own Label

Launching a cassava based finished product brand is an innovative opening and a method to reach UK consumers while generating value. It should be noted that cassava is an emerging ingredient for many consumers so education would be key and any interested party would require a long term view. It would require time and investment, along with sourcing production partners in the UK or Europe, plus deploying a team in the UK to manage and market the brand. This could open up private label opportunities - a market proven to be valuable given the high rate of own label activity in the UK.

Not many brands operate in the cassava space in the UK, so this poses an opportunity for an interested party to launch a range of products focused on cassava innovation. The marketing and development costs carry greater risk as the market is less proven. Innovative snacking is highly receptive to these trends - the UK has seen popped lotus seeds, crickets, sweet potato and other deviations from the national favorite - the potato chip - seeking market penetration with new taste, dietary or sustainability angles.

Figure 15 - A selection of emerging snack brands in UK retail



Source: Various

Snacks are a fierce category in the UK and are very contested. Often new innovations attract multiple entrants within a few years, so expect competition when expecting to launch a new idea or processing technique.

Launching a brand takes a lot of work in the UK. The competitive considerations should not be underestimated. A smaller than required marketing and communications budget can lead to failure and the size of that budget varies according to competition, trend awareness, channel and demand. Sometimes a great product can really sell itself and become a must buy - but that happens to a small minority of brands. Unfortunately, the majority of brands can fail and snacking can be a tough category in terms of survivability. However, giving the nation's love for snacking, it can also be one of the most valuable categories in food that can take many years to get right.

2.5. Pricing and Model

Single ingredient example pricing (Independent Retail)

The below examples show wholesale (Price) and recommended retail (RRP) pricing for a range of products. All of these products are **VAT Exclusive (0%)**.

Pricing Examples - Cassava Single Ingredient (Raw / Semi finished)

Figure 16 - Example wholesale pricing for organic packaged cassava products

Code	Description	MIN*	Brand	RRP	Price
TIA5	All Purpose Cassava Flour 500g (order in singles or 12 for trade outer)	27/04/2022	Tiana	£4.99	£3.82
JN287	Organic Cassava - All Purpose Flour 500g	05/11/2021	Just Natural Organic	£2.89	£1.73
JNB437	Organic Cassava Flour 25Kg	25/06/2021	Just Natural Bulk	£64.99	£48.99

Pricing Examples - Tapioca Single Ingredient (Raw / Semi finished)

Figure 17 - Example wholesale pricing for organic packaged tapioca products

Code	Description	MIN*	Brand	RRP	Price
JNB438	Organic Tapioca Flour 25Kg	07/08/2021	Just Natural Bulk	£49.99	£39.40
JN288	Organic Tapioca Flour 500g	28/11/2021	Just Natural Organic	£2.39	£1.44
DF32	Tapioca Flour Gluten Free 100g (order 5 for retail outer)	05/02/2021	Doves Farm	£1.42	£1.10

Single ingredient margins (Independent Retail)

Using 500g organic cassava flour as an example;

- If deploying a brand, you would expect an approximate 52% wholesale / retail margin.
 - A product with an RRP of £2.89 would yield £1.39 for the seller.
 - You would require a brand with brand overheads (higher overheads).
 - Up to **60% more value** than bulk / private label.
- If selling in bulk to a brand (under their own / private label), this could be as high as 70%.
 - A product with an RRP of £3.99 would yield £0.87 for the seller.

- Take into consideration selling in bulk packages / by the pallet (lower overheads).
- Up to **37.5% less value** than deploying under your own brand.

Note: This is an example for one organic prepack. Actual margins and value vary on a byproduct, by customer basis.

2.6. Import Laws and Considerations

Any entry strategy must also take laws into consideration. Importing goods into the UK is heavily regulated. The rules are complex and it is recommended to use a freight forwarder or specialist importer for advice.

If setting up a UK company, you can register with Her Majesty's Revenue & Customs (HMRC) for duty deferment. This means any import duty or VAT incurred can be deferred to a later scheduled date by supplying your duty deferment number to the haulage company or agent dealing with your shipment.

UK importers will require an Economic Operators Registration and Identification (EORI) number which can be applied for via HMRC. This EORI number is required for all imports along with commodity codes. As with most international trade, this is usually done by a freight forwarder.

Duty rates in the UK vary depending on the specific product which needs checking on a product by product basis. They vary according to the goods, origin, value and proposed use. Due to a number of trade agreements worldwide, some countries can benefit from reduced duty rates. Focus countries including Dominican Republic and Jamaica have a tariff preference duty rate of 0%.

VAT rates in the UK vary depending on the specific product which needs checking on a product by product basis. For example, cassava and tapioca are exempt from VAT (0%). While VAT is often 'claimed back' by VAT registered companies. Unlike some countries such as the USA who apply taxes at checkout, UK VAT is included with the product price on the shelf.

Working out duty or VAT is all calculated in GBP using a conversion rate published by HMRC, regardless of the currency the products are sold / bought. If transferring the goods to a UK entity owned by the exporter, then the true market value would need to be declared. Incorrect or false declarations can result in an investigation, a fine, legal fees and a negative mark on your file. Again, using a specialist importer or knowledgeable freight forwarding company would help mitigate mistakes and ensure you are not underpaying or overpaying duty.

Example for tapioca, cassava - duty rates vary depending on origin / EPAs however examples such as Sierra Leone carry 0% duty under tariff preference schemes (GSP R12/978). VAT is 0%.

Organic - Importing under the EU's TRACES NT system requires coordination with a certifier and handling agent in the country of origin, following specific guidance and logging certificates on the system under a closely monitored process which is checked and signed off by authorities on entry to the UK. If the process isn't done correctly, the container can be rejected by Port Health (the authority who approve organic shipment at ports in the UK) which means the shipment could be classified as non-organic, be returned to point of origin or destroyed, all at the cost of the exporter or importer. It's important to note changes to this system have been implemented post Brexit and during the COVID epidemic. Ensure, if using a third party warehouse, it is registered to store organic goods. Ensure the designated freight forwarder is familiar with the organic importation and handling process.

Brexit - As ongoing negotiations continue, the above are subject to change as the UK leaves the European Union. Current EU laws will remain in place until trade negotiations end on the 31st December 2020. Following this, efforts are being made to replicate policies to ensure a smooth transition. One change would be requiring EORI registration for imports from the EU (previously not required and coming into effect from 2021). The UK has committed to a trade agreement with Sierra Leone post Brexit.

Coronavirus - Supply chains are being heavily pressured under extreme pressures. Shipments are currently taking longer than usual as workforces are depleted at all parts of the process. This must be factored in, and should be continually monitored as the global situation intensifies.

Virtual warehouses can be utilized to store pallets of stock domestically so they can be dispatched in a timely manner. They can also service samples sent to potential customers. This improves penetration as you can service smaller customers as opposed to those who take container loads.

Ensure invoices generated comply with UK law - stating clearly it is an invoice, with the date, a reference, plus details of the supplier and purchaser.

2.7. Sales Considerations

The UK can present a busy and complex landscape, and buyers can be unresponsive without a considered approach. While a UK sales agent with existing contacts is recommended, they can be expensive and require time to source and brief.

When contacting UK buyers the following points must be considered:

- **Show patience.** UK buyers are busy people, and doors can take time to open. Aggressive sales are ineffective and detrimental, and any conceived pressuring will lead to a swift end in negotiations with little or no notification of this. A sensitive sales approach is required, where the buyer is made to feel in control at all times.
- **Use email.** UK buyers prefer communicating by email in general. Phone calls are not recommended without an appointment, unless this is a pre-agreed approach to business. Try to respond within 24 hours, but do not necessarily expect that in return. A follow up after 3-4 days is a common approach if communication has flattened out.
- **Know your buyer.** This works from two angles:
 1. First, be clear and transparent. Do they want your product? Does it fit their sourcing policy? Is it better than what they already buy / sell? What is your USP? Having a short, prepared sales document will show you are prepared as an exporter and will win the trust of the buyer.
 2. Second, respond to specific requests. Do they need a particular packaging size? Do they have any questions about pricing? Do they want transparency with regards to sourcing? Can the import direct? Once again being clear, concise and transparent is key.
- **Provide literature.** Supporting sales documents can be invaluable should you buyer need anything to refer back to. Pricing, USPs etc. should all be clearly stated without being overpowering.
- **Be consistent.** In terms of quality of product, responsiveness and production timescales, consistency is incredibly important in building trust and will allow relationships to evolve into long-term partnerships.
- **Be punctual.** The UK is traditionally very unsympathetic to lateness and no-shows. If unable to make a call/meet, let all parties know well in advance. If connectivity is an issue, ensure this is checked well ahead of time and have back up plans in place.
- **Be aware.** Timescales can be lengthy and negotiations can involve considerable back and forth. Sufficient time expectations are required. For a smaller importer/wholesaler this can be a lead time of a few months, but for a larger multiple this may take years, and producers should be prepared to satisfy a number of requirements to win the contract.
- **Offer samples.** Buyers will often request them if they are interested, but offering to send out samples should be a priority, as it gives an opportunity for feedback as well as one to follow up. For Garri or cassava, 50-100g bags would be sufficient, accompanied by some sales literature as previously mentioned.
- **Start small.** Targeting the largest customers first is often the worst strategy for new exporters. A sustained growth model from small to large customers will allow a supply chain to be built that will cope with the demands of multiples.

- **Avoid food service, for now.** The UK food service industry is currently completely closed due to coronavirus, meaning increased load on retail. There has been some indication when UK lockdown is likely to be lifted, however it is still unclear when various stages will occur. This should be taken into account when planning routes to market and potential sales strategies.
- **Display certifications clearly at point of sale.** Organic/sustainable - can it be proved? Different suppliers will have individual requirements with regards to certifications. Being upfront about this will allow you to bring negotiations to a close quickly if not yet able to meet them, and to get back in touch once you are.

2.8. Market Access and Penetration

For exporters of cassava, there are a variety of customers to target in various formats that have been explored over the course of this report.

For the initial recommended route into World Food distributors, a UK sales agent would be recommended to approach potential customers, explain the benefits of the product and compare with existing supply, negotiate pricing, supply samples and literature, sign up customers and arrange invoicing, coordinate delivery and provide ongoing support to clients. It is, however, a long process to sign up customers that can take several years to mature.

Cassava does however represent a young market that looks set for growth. With this in mind a well-connected sales representative in the UK would perform better when compared to sales conducted from a sales person outside of the country, as they will be able to access existing contacts far quicker and with the required sympathetic approach. Given the initial volumes involved however a sales agent may not be cost effective at this stage. This will need to be an internal decision by stakeholders.

Any sales agent, be it hired or internal, will require sales documents to support and proper sample packaging as previously mentioned. These could be created with the guidance of said agent or agency, who will be able to lend expertise of the market to the creative process. Agents will also require pricing structures based on different volumes, a full understanding of the product range and the USP of Sierra Leonean cassava.

British businesses will not swap or add a new supplier without a point of difference. This point of difference will be dependent on the producer situation, but it is recommended to take steps to be competitive on price at this early stage in the market. Other considerations should be premium quality, ethical certifications and/or a strong story that unites all producers under a brand that allows further value addition.

If a sales agent is not being considered, then the following plan of action could be adopted by exporters of cassava products to enter the UK market.

1. Decide on the products to export and the market to target off the back of this report. Research a set of customers to target initially.
2. Source sample packs and compile sales literature relevant to the UK buyer.
3. Set up a website with key information in order to add authenticity, and acquire email addresses of the same domain.
4. Make contact via email with brokers, importers, retailers and distributors that are relevant to the target market and the agreed strategy (retail, private label, niche etc.).
5. Set up video and/or telephone calls to introduce yourself, consider a virtual tour of the facilities to add value.
6. Send samples on request and follow up with pricing, certifications etc.
7. Enter into negotiations with a rough idea of volume and pricing required, lead times etc.
8. Follow up once every two weeks if no contact has been made.

2.9. Launch Campaign

Many UK entities exist that specialize in launching products into the UK market and could assist with any launch campaign or sales exercise. Regardless, any sales campaign must be structured in such a way that facilitates long-term growth, and much of this will begin with preparing Sierra Leonean producers with appropriate training.

A two-stage process is therefore proposed that would allow such an approach, where assistance could be provided with the following:

Phase one: Market readiness and access (6 months)

Provision of inputs and feedback on:

- Five year UK business plan;
- Website and packaging development, including sample packs;
- Sales positioning for Sierra Leonean cassava products, including production of sales literature relevant to UK and EU markets.
- Identification of 100 customer targets relevant to cassava products.
- Lab testing and grade 2 nutritional analysis of produce.
- Consultancy on NPD and expansion of product range to satisfy needs of UK market.
- Plan and confirm commercial mission.

Phase two: Sales and promotion (6-12 months following completion of phase 1)

Implementation of a series of sales promotion activities targeting UK B2B markets:

- Represent cassava producers in trade shows (if COVID-19 conditions permit and trade shows available);
- Send out sample packages to distributors and collate feedback;
- Send out sample packages to retailers to encourage feedback / buy in;
- Visit key distributors to introduce and sell the brand;
- Select list of top potential distributors to send trials and target in sales efforts;
- Social distancing and international travel regulations permitting, organize a commercial mission of Sierra Leonean SEs to the UK, including buyer meetings, sample and testing requirements, guidance on marketing and promotion in alignment with buyer expectations. If mission to UK is not possible, organize online meetings.
- Facilitate sales with a minimum of 2 distributors in the UK on behalf of Sierra Leonean producers and hand over once ready.
- Registration with memberships / organizations (e.g. Soil Association, Organic Trade Board, Vegan Society).
- Provide recommendations on NPD where necessary.

2.10. Conclusions and final recommendations

Cassava is increasingly relevant to the burgeoning health & wellness trend being adopted by a younger consumer group, as well as the Free From movement, which could see cassava positioned as a wheat/gluten alternative. World Foods have also been shown to be a growth market, and given there is already an existing supply chain in place with certain exporters it seems logical to expand within this market as a priority, before accessing others.

The United States shows significant potential for cassava, where it is readily available as a healthy product. Trends there tend to be three to four years ahead of the UK, and so valuable lessons can be learned to guide NPD in the future.

Initial conversations with stakeholders did however show a sizable disconnect between capacity and requirements of the export market, with many producers identifying considerable barriers to such activity. The following short and long-term recommendations have therefore been proposed to bridging that gap before expanding capacity, in order to build long-term and sustained export growth:

Short term recommendations:

1. Address quality issues to ensure continuity of product, including consideration of identified standards required to supply the export market.
2. Invest into packaging solutions that offer greater flexibility to the UK buyer, including sample packaging.
3. Consider subsidies and/or investment that would allow for greater production of products at scale, as well as adherence with international standards.
4. Commence a market readiness and access campaign, aimed at helping SMEs and exporters meet the requirements of the UK market and forming a detailed plan for market access. This would include identifying key USPs of Sierra Leonean cassava that would provide a competitive advantage, and producing sales literature and other marketing vehicles (e.g. websites) that would facilitate a sales campaign. Training could also be given on accessing UK buyers, who can be notoriously difficult.
5. Commence sales campaign concentrating on garri, which while limited in market size is produced in high volume already,

Long term recommendations:

1. Employ a UK sales agent to negotiate contracts on behalf of producers and execute a sales and promotion aimed at the World Foods sector.
2. Consider certification schemes such as Rainforest Alliance and/or organic methodology in order to open up new markets.
3. Invest into packing/labelling capacity to open up the private label sector.

Consider NPD to offer greater options to UK buyers in different markets and other value-add products such as frozen leaves and flour.

PART 3: JOINT CONSIDERATIONS

3.1. Brexit and Coronavirus

1. Brexit

As previously mentioned, Brexit officially occurred on the 31st January 2020, with the UK & EU entering a trade negotiation phase until the end of the year. As of the 1st January 2021, the UK will become a legal entity in its own right, able to make its own laws and trade freely with the rest of the world. In the short term, the UK is expected to adopt all current EU legislation before altering in a phased approach, a timeline for which has not yet been set out. One thing is certain however - politicians would be loath to disrupt supply chains significantly and so many businesses will be hoping they take steps to minimize the impact.

The majority of businesses will be looking at the next eight months with some concern. The negotiations are aimed at reaching a trade agreement, with many expecting a low alignment outcome. Should negotiations prove particularly unsuccessful, a no-deal Brexit would occur, and the effect on trade with the EU in particular could be significant. Tariffs will apply instantly, and this is likely to have a significant impact on the secondary trade done with the continent. As shown earlier, many large businesses are already planning for this scenario by shifting production to lower-labor markets outside of the EU.

There are also significant implications for Sierra Leone, which will retain tariff-free access to UK markets after the UK leaves the EU. With the coronavirus pandemic taking a considerable proportion of the Government's effort, trade negotiations have been delayed, and now a deal with the EU is taking immediate priority¹. Commonwealth countries have been prioritized therefore, as the recent deal with Australia shows². Economics dictates that imports will look for the cheapest and most efficient supply chains.

The wider effects on the UK economy have also been widely postulated but given the level of uncertainty it is difficult to predict any outcomes. In light of the coronavirus outbreak there have been widespread reports of an extension to the negotiations, reports welcomed by the EU, however these have been swiftly squashed by Boris Johnson and the UK Government.

With so much uncertainty then, Brexit offers a multi-faceted threat. Firstly, import regulations may well change as laws are reviewed and while tariffs will not be imposed on Sierra Leonean produce, changes to legislation could have a significant impact on direct export potential. While this is still an unknown variable it is difficult to postulate, however the review of any outcome will need to be factored into planning, with regular reviews of legislation scheduled and an agile approach required to factors such as certification and labelling.

Second, unknown outcomes have been causing exchange rates to fluctuate dramatically thanks to volatility in the markets. Uncertainty always delivers significant detriment to any economy, and over the past 12 months the pound has fluctuated enormously against both the Euro and the Dollar, as displayed in table 8.

Table 8 - Twelve-month extremes for GBP vs. EUR & USD, as of 28/4/2020

Pound vs.	High (date)	Low (date)
Euro	1.2044 (18/2/20)	1.0602 (18/3/20)
Dollar	1.3335 (16/12/19)	1.1479 (19/3/20)

Source: WebFG via BBC³

Staying with the economy, a recession is a very real threat in the current climate, with many sources postulating that⁴. Combined with the shrinkage caused by the coronavirus outbreak, Brexit could have an unprecedented effect on jobs, growth and thus consumer spending. In previous recessions, luxury industries have been hardest hit, which would see the already struggling food service industry falter far more significantly than retail.

Another issue Brexit poses, particularly to the food service industry, is that of labor. A low alignment Brexit would see free movement ended, which could put considerable strain on the food service industry in particular which is heavily reliant on foreign workers.

All things considered, operating 'in house' where possible and shortening the supply chain will avoid any future interruptions. Setting up direct supply chains with the UK is recommended in order to minimize the border crossings that could bring with them additional tariffs and taxes.

Finally, any high volume supply chains should only be confirmed once more clarity has been delivered regarding Brexit. Any interruption to free trade in any capacity is likely to have far-reaching implications that cannot all be predicted, and it is therefore less fluctuating processes such as packaging and certification schemes that should be prioritized.

2. Coronavirus

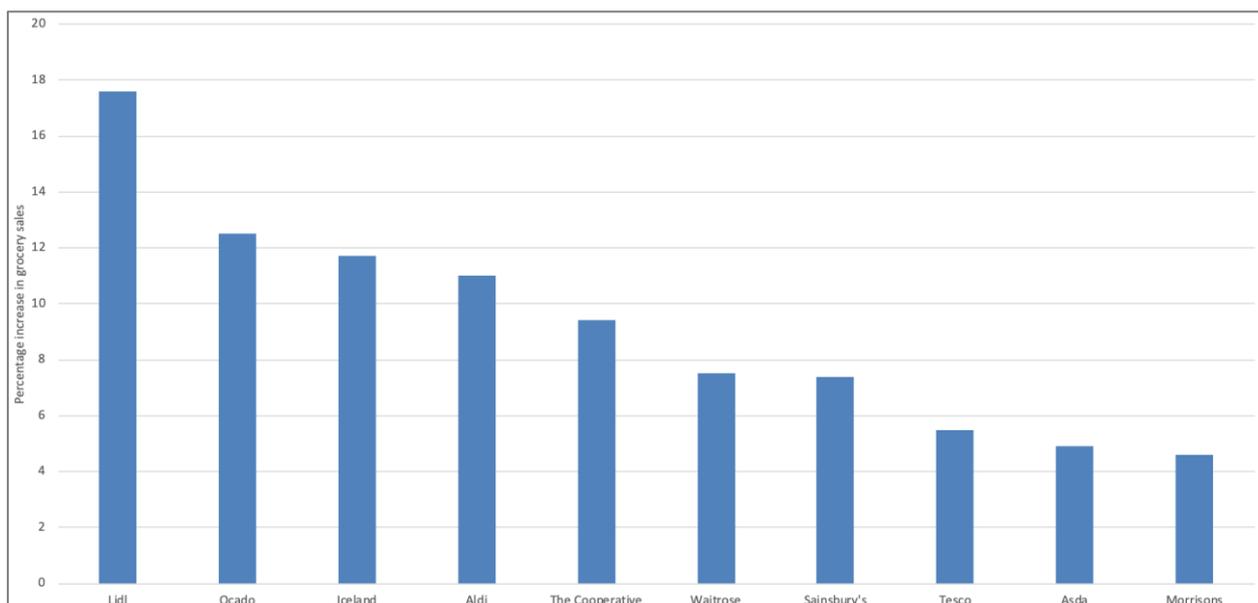
The coronavirus has had the most significant impact on the UK economy since the Second World War. Unprecedented social restrictions, including the closure of all pubs, cafes and restaurants, came into place on the 23rd March 2020, and as of the end of June 2020 were being eased but by no means ended. This is a situation mirrored in many other countries around the world, with world leaders warning that a second spike in infection rates could be disastrous should the measures be lifted too soon.

In Wuhan, China, where the outbreak began, a 'new normal' has been put in place where movement is restricted by a mobile app which designates a risk category. Such schemes are possible and being investigated in the UK, but are much more unlikely to become reality due to fears of cost, privacy violations and lack of uptake that have already seen the demise of a contact tracing app designed to track the outbreak.

As the UK has now entered a downturn in deaths caused by the first phase of the virus, the uncertainty shows no signs of abating. The effect on the food service industry has been immense, while retail, and in particular grocery retail, has seen a surge in demand which has boosted turnover, as detailed in figure 18.

In terms of overall picture, the Office for Budget Responsibility has warned that the coronavirus crisis could cause a 35% fall in gross domestic product this spring⁴. The damage to the economy escalates with increasing length of lockdown measures, meaning this estimate could be conservative. As many as two million job losses are expected, meaning that even when lockdown measures are lifted, consumer spending could still be heavily impacted.

Figure 18 - UK: COVID-19 impact on grocery sales by store in the 12 weeks ending 22nd March 2020



Source: Kantar Worldpanel⁵

A recent release by Mintel⁶ shows what a significant effect the Coronavirus outbreak is having on UK shopping habits. In a short space of time online shopping has seen a dramatic boost with the number of consumers who say they've increased their online shopping rising to 36%, with the online grocery market expected to grow 33% in 2020 after many years of slow growth. This is backed up by data from Kantar Worldpanel, which shows Ocado, the UK's leading online supermarket, experiencing considerable growth in sales during the outbreak.

While all major retailers in the UK are experiencing growth in sales during the coronavirus outbreak, there are noticeable trends. Primarily the most extreme growth in sales has been via retailers at opposite ends of the market: Lidl, Iceland and Aldi are dominant discounters while Ocado, Waitrose and to a lesser extent The Cooperative occupy the high end and convenience sector. Meanwhile mid-range retailers, traditionally the UK's biggest, have experienced less rapid growth⁵.

But the coronavirus is a global pandemic, and its effects are far reaching. Conversations with stakeholders revealed that Sierra Leone has essentially been 'shut down' by the pandemic, and as a consequence supply of all grown and produced commodities has dropped. A second peak in the UK, or indeed a continued pandemic in the African region could make supply chains unsustainable in the long term, and therefore operating initially at low volumes until a more certain picture is available is the most logical way to proceed. Furthermore, despite considerable investment to help the country fight the outbreak from the World Bank and others, there are considerable fears that both the health and economic impacts could be vast, particularly given the recent Ebola outbreak⁷.

Any launch into the UK over the next 12-48 months will need to be carefully considered, with consumer habits potentially altered long term. Demand for many products has been altered with food service closed and retail being boosted as a result, and combined with the threat to supply chains caused by Brexit, a slow build strategy is recommended for any producer, but particularly those who are new to UK export.

3.2. Events and Trade Shows

Identifying key partners to meet and shows to visit should be a consideration for any stakeholder wishing to enter the UK market. Trade shows still represent a strong opportunity to network; to meet importers, exporters and key retail and distribution partners working in almost all channels. All UK events listed are in 2021; all relevant 2020 events have now been postponed due to the coronavirus outbreak.

A small number of European shows have also been recommended that could be particularly relevant to cassava producers wishing to enter the European market, particularly if private label is a consideration.

Table 9 - List of recommended trade shows.

Name	Location	Proposed Date	Focus
PLMA's World of Private Label	RAI, Amsterdam, The Netherlands	2-3rd December 2020	Large private label event.
IFE 2021 The Hospitality Show	ExCel Centre, London, UK	22-24th March 2021	The UK's largest food & drink event. Large and highly recommended.
Food & Drink Expo 2021, The Ingredients Show	NEC, Birmingham, UK	12-14th April 2021	Large trade event encompassing food service, retail, speciality and more.
Natural & Organic Products Europe	ExCel Centre, London, UK	18-19th April 2021	Leading European natural & organic trade show.
Speciality & Fine Food Fair	Olympia, London, UK	6-7th September 2021	Consumer and trade event highlighting artisanal food & drink.

Lunch!	ExCel Centre, London, UK	23-24th September 2021	Trade show targeting the entire F2G industry.
SIAL	Nord Villepinte, Paris, France	15-19th October 2022	The world's largest food innovation exhibition.

3.3. Final Recommendations and Next Steps

Cassava is a very unique market. It is emerging, diverse and potentially on-trend in terms of consumer demands. Cassava is currently a low volume and niche market with no major entities or established supply chains.

Cassava is increasingly relevant to the burgeoning health & wellness trend being adopted by a younger consumer group, as well as the Free From movement, which could see cassava positioned as a wheat/gluten alternative. While it is a young market, trends can be identified from other countries such as the United States which tend to be three to four years ahead of the UK. It also has a strong base with World Food importers, particularly those African suppliers who serve an increasing diaspora market.

With this in mind cassava products require long-term strategies, such as seeing volume increased through a targeted campaign within the world food niche. Sierra Leonean produce could gain a competitive advantage depending on Brexit negotiations, with free trade maintained thanks to an existing trade agreement that other competing countries will not have in place as of 31st December 2020.

Caution should be applied though. Considerable investment will be needed by producers in Sierra Leone to fix internal production issues that will prevent long term supply into global markets at scale, while the coronavirus outbreak presents a level of uncertainty with respect to supply and demand that makes building a long term strategy challenging. While export volume could be increased quickly, these issues could cause more harm than good in the long term and therefore while global uncertainty makes supply difficult, investment should be prioritized into identified areas of concern to remove bottlenecks in the supply chain and barriers to accessing markets.

For cassava, immediate concerns are maintenance of quality and potential certifications that would allow entry into other niche and emerging markets, as well as investing in packaging solutions, machinery and sales materials that would allow professional sampling. Visiting any of the trade events outlined in the previous chapter would provide insight into the requirements of the UK and European markets, and may provide a valuable chance to network.

As it stands, the following recommendations have been made with regards to Sierra Leonean cassava and its entry into the UK market:

Short term recommendations:

1. Address quality issues to ensure continuity of product, including consideration of identified standards required to supply the export market.
2. Invest into packaging solutions that offer greater flexibility to the UK buyer, including sample packaging.
3. Consider subsidies and/or investment that would allow for greater production of products at scale, as well as adherence with international standards.
4. Commence a market readiness and access campaign, aimed at helping SMEs and exporters meet the requirements of the UK market and forming a detailed plan for market access. This would include identifying key USPs of Sierra Leonean cassava that would provide a competitive advantage, and producing sales literature and other marketing vehicles (e.g. websites) that would facilitate a sales campaign. Training could also be given on accessing UK buyers, who can be notoriously difficult.

5. Commence sales campaign concentrating on garri, which while limited in market size is produced in high volume already,

Long term recommendations:

1. Employ a UK sales agent to negotiate contracts on behalf of producers and execute a sales and promotion aimed at the World Foods sector.
2. Consider certification schemes such as Rainforest Alliance and/or organic methodology in order to open up new markets.
3. Invest into packing/labelling capacity to open up the private label sector.
4. Consider NPD to offer greater options to UK buyers in different markets and other value-add products such as frozen leaves and flour.

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