

## Chapter 2

### **The Food Industry and Supermarkets in Eastern Africa: A preliminary report on research in Tanzania and Ethiopia**

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#### *Abstract*

In recent years, domestic demand, via supermarkets, has begun to exert a considerable influence on agricultural production and food supply in eastern Africa. Thus, demand-driven approach is useful for providing an introduction to the growth of agriculture and the food industry. Analyzing the mechanism of the food chain from agriculture to food processing to food retailing within eastern Africa, this study aims to analyze the business relationships and coordination and competition among South African capital, Kenyan capital and local capital in the food industry and supermarkets in eastern Africa. In this paper, some examples of food manufacturers and supermarkets have been introduced with reference to Tanzania and Ethiopia as an interim report.

Key Words; value chains, food industry, supermarket, eastern Africa

#### **1. Introduction**

The importance of the role of the agricultural sector in the economies of eastern Africa cannot be denied, particularly in terms of employment and exports. Table 1 shows the structure of food and agricultural raw materials exports in Ethiopia, Kenya, Tanzania and Uganda. Food and agricultural raw materials exports account for 40% of total exports in all four countries. This percentage is far higher than the average for the countries of Sub-Saharan Africa. Except for gold in Tanzania, mineral products are not major contributors to the economies of eastern Africa. It is often said that in order to overcome the difficulties that hamper the agricultural sector in the region – problems such as the limitation of the markets for agricultural products and fluctuations in commodity prices – the promotion of high value-added products should be the key factor. Although agriculture is a big contributor to GDP in the region, industries based on agricultural products, including

beverages and tobacco products, remain weakly developed (see Table 2).

**Table 1 Structure of food-related merchandise exports in selected eastern African countries**

	% of Total			
	Food		Agricultural raw materials	
	1995	2007	1995	2007
Ethiopia	73	61	13	20
Kenya	56	43	7	12
Tanzania	65	35	23	7
Uganda	86	62	4	8
Sub-Saharan Africa	17	11	6	3
Low & middle Income	14	10	4	2

Source: World Bank [2009] pp.216-218.

**Table 2 Structure of food-related output in selected eastern African countries**

	% of GDP			
	Agriculture		Food, beverages and tobacco	
	1995	2007	1995	2007
Ethiopia	57	46	2.6	2.4
Kenya	31	26	-	3.2
Tanzania	47	45	-	-
Uganda	49	24	-	-
Sub-Saharan Africa	18	15	-	-
Low & middle Income	14	10	-	-

Note: Manufacturing share of GDP in 2007 is 7 % in Tanzania, 8 % in Uganda, and 14 % in Sub-Saharan Africa as a whole.

Source: World Bank [2009] pp.208-210, 212-214.

Value-added agricultural products take several forms, and include higher quality or niche horticultural products grown for export markets as well as processed food products. In eastern Africa, substantial quantities of international capital are being invested in the horticulture and beer industries. In domestic markets, supermarkets have a potentially significant impact on marketing systems for agri-food products. Since the 1990s, supermarkets have proliferated in southern and eastern Africa, and have accompanied

urbanization and the rise of the middle class.

Among the South African supermarkets, Shoprite has become the main player so far as African supermarkets are concerned. However in eastern Africa, Kenyan supermarket chains, including both Nakumatt and Uchumi, have built up strong networks not only in Kenya but also in Uganda and Rwanda. In the near future, this trend is likely to appear in Tanzania, too. As Weatherspoon and Reardon have observed [2003:333], “supplying supermarkets presents both potentially large opportunities and big challenges for producers. Supermarkets’ procurement systems involve purchase consolidation, a shift to specialized wholesalers, and tough quality and safety standards”. Although the combination of food products and supermarkets could be an important new development for the region, so far the topic has not attracted the research attention that it deserves.

Skytte and Bove [2004] is among the few studies who have tackled this subject, but they have focused their attention on retailer value chains in Denmark and Germany. Connell, Smithers and Joseph [2008] has examined the relationship between farmers’ markets and food value chains in Canada. Also relevant is the work of Blandon, Henson and Cranfield [2009], who has analyzed fruit and vegetable supply chains for supermarkets in Honduras. In an African context, the relationship between value chains and globalization is well described by Gibbon and Ponte [2005]. Lund-Thomsen and Nadvi [2010] has compared Kenya’s cut flower sector with those of other countries, with particular reference to collective activities. Meanwhile Narrod et al. [2009] has also examined collective activities with reference to the case of green bean production in Kenya. Barrientos, Dolan and Tallontire [2003] in their study of fresh fruit and vegetable production, has focused on codes of conduct in the South African fruit, Kenyan flower and Zambian vegetables and flower sectors. Gibon [2003] has examined the role of EU supermarkets in South African exports of fruit and vegetables. Among the various existing studies, that of Weatherspoon and Reardon [2003] is a pioneer work which focuses on the procurement systems of South African supermarkets. We now need to follow up these studies with an analysis of the rapid changes that have resulted from the activities of supermarkets in eastern Africa.

In research terms, the present two-year study has two main purposes. First, the study aims to clarify the mechanism of the food chain from agriculture to food processing to food retailing within eastern Africa. Preliminary research took the form of visits to four countries, namely Tanzania, Ethiopia, Uganda and Kenya, in the course of three short trips carried out

between September 2000 and February 2010. Following these visits, the research will focus on one field area in two countries or two areas in one country. The second main purpose of the study will be to analyze the business relationships and coordination and competition among South African capital, Kenyan capital and local capital in the food industry and supermarkets in the selected field areas.

As an interim report, this article focuses on Tanzania and Ethiopia. The article is divided into three main sections. The first classifies the argument concerning the value-chain approach. In particular, it will be shown that the demand-driven or market-first approach represents a new kind of approach in studies of food chains. The second examines the potential of the food industry in Tanzania and Ethiopia for further development, using some examples based on interviews with local respondents. The third and final section analyzes the fruit and vegetable supply chain network of supermarkets in Tanzania and Ethiopia.

## **2. Value Chains and the Demand-Driven Approach**

### **2.1 Value chain approach**

As an analytical tool in studies of the food industry, the value-chain approach is often considered to be appropriate. Sturgeon[2001] has given a useful summary of the differences between the value chain and the production network (see Table 3). Compared with the production network approach, which emphasizes inter-firm relationships, the value chain approach centers on the analysis of the series of stages that are involved from production to consumption.

Gereffi et al. [2001: 3] has classified types of chains and spatial scales, and in doing so, they have drawn our attention to five research approach. First, supply chains are a generic label for an input-output structure of value-adding activities, beginning with raw materials and ending with the finished product. Second, international production networks focus on networks in which multinational corporations act as global network flagships. Third, global commodity chains emphasize the internal governance structure of supply chains and highlight the role of diverse lead firms in setting up global production and sourcing networks. Fourth, the French *filière* (or chain) approach consists of a loosely knit set of studies that have examined chains of activities as a method mainly for analyzing trade in agricultural export commodities. Lastly, global value chains are required to bring a product

or service from conception through the different phases of production, to delivery to final consumers, and final disposal after use.


**Table 3 Value chain vs. production network**

Name	Definition	Metrics	Other names
1. Value chain	<ul style="list-style-type: none"> <li>the sequence of production (i.e. value-added) activities leading to and supporting end use</li> </ul>	<ul style="list-style-type: none"> <li>the bundles of activities that various actors do, or do not, engage in</li> </ul>	<ul style="list-style-type: none"> <li>supply chain</li> <li>commodity chain</li> <li>production chain</li> <li>activities chain</li> <li>product pipeline</li> </ul>
2. Production network	<ul style="list-style-type: none"> <li>a set of inter-firm relationships that bind a group of firms into a larger economic unit</li> </ul>	<ul style="list-style-type: none"> <li>the character and extent of inter-firm relationships</li> </ul>	<ul style="list-style-type: none"> <li>value network</li> <li>supply base</li> </ul>

Source: Sturgeon [2001] p.11.

Governance is regarded as a central concept in value-chain analysis. There are three forms of governance in value chains: inter-firm networks, quasi-hierarchical relationships between powerful lead firms and independent but subordinate firms in the chain, and vertical integration within enterprises (Gereffi et al. [2001: 4]). Gereffi, Humphrey and Sturgeon [2005] identifies the key determinants of global value chain governance (see Table 4). Each governance type provides a different trade-off relationship between the benefits and risks of outsourcing.

**Table 4 Key determinants of global value chain governance**

Governance Type	Complexity of transactions	Ability to codify transactions	Capabilities in the supply-base	Degree of explicit coordination and power asymmetry
Market	Low	High	High	Low  High
Modular	High	High	High	
Relational	High	Low	High	
Captive	High	High	Low	
Hierarchy	High	Low	Low	

Source: Gereffi, Humphrey and Sturgeon [2005] p.87.

According to Humphrey [2006], there are four trends in global agribusiness or global markets for food products, namely (1) retail concentration and power, (2) increased concentration at multiple points in food value chains, (3) standards, (4) product differentiation and credence claims.

## 2.2 Demand-driven approach

Recently, demand-driven or market-first approach which focuses on the retail market attracts attention as practical approach for development. In this section, two successful examples are introduced. The first is the South African initiative “Agribusiness in Sustainable Natural African Plant Products (ASNAPP)”. It was introduced in 1999 in South Africa against a backdrop of poverty, unemployment and the spread of HIV/AIDS. ASNAPP, nowadays operating in Ghana, Rwanda, Senegal, Zambia and South Africa, is currently partnered with 25 enterprises, representing over 2000 small-scale farmers<sup>1</sup>. Each of ASNAPP’s country offices functions as an independent NGO. ASNAPP maintains strong links with academic and research institutions.

**Table 5 Accomplishments of ASNAPP**

Years	No. of Enterprises Benefiting	No. of firms Multiplying Technologies	No. of farmers Trained	No. of Partnerships Formed	Volume of Products Sold (tons)	Value of Products Sold (\$)
2000	28	45	830	6	45	90,000
2001	34	26	1,650	7	150	300,000
2002	37	190	2,962	16	121	306,700
2003	121	211	2,621	23	174	340,000
2004	235	180	7,485	31	380	927,050
2005	183	175	12,782	48	573	3,418,602
2006	130	150	12,991	29	1,721	8,214,368
2007	260	180	16,745	69	1,864	5,473,287
Total	1,028	1,157	58,066	229	5,028	19,070,007

Source: ASNAPP web page; <http://www.asnapp.org/index.php/accomplishments-mainmenu-89>

<sup>1</sup> The information in this section is based on ASNAPP’s home page; <http://www.asnapp.org/> and on the author’s interview with an ASNAPP representative on September 1, 2009.

Table 5 shows ASNAPP’s main accomplishments between 2000 and 2007. ASNAPP provides not only technical support to firms and training to farmers, but also opens up opportunities for sales. Moreover, ASNAPP is an advocate of the “market-first approach”. In Zambia, ASNAPP acts as coordinator of a thriving partnership between two local communities and Sun International Hotels, and Shoprite and Spar Supermarket, and has created a vegetable production network using a combination of conventional farming systems and hydroponics technologies. From time to time, ASNAPP holds coordination meetings attended by the various parties involved.

**Table 6 SNV’s value chains in southern and eastern Africa**

Country	Products
Ethiopia	oilseed, horticulture, livestock, non timber forest products
Kenya	horticulture, livestock
Mozambique	oilseed, horticulture
Rwanda	non timber forest products
Sudan	livestock, non-timber forest products
Tanzania	oilseed, livestock
Uganda	oilseed, livestock
Zambia	oilseed (biofuels), non timber forest products
Zimbabwe	horticulture, livestock

Source: Netherlands Development Organisation, SNV [2010].

Another good example of the demand-driven value chain approach is SNV, the Netherlands Development Organisation<sup>2</sup>. SNV focuses on four main value chains: those for oilseeds, horticulture, livestock and non-timber forest products in nine southern and eastern African countries (see Table 6). SNV is promoting a demand-driven approach which it summarizes as “support for business organizations and their access to markets”. According to the head of value chain development in Ethiopia, SNV emphasizes the role of supporting processors and exporters throughout the whole of the value chain process, which may be summarized as input supplier – farmer / producer – middleman – processor / exporter – wholesaler / retailer – consumer. SNV believes that for farmers, market access can be enhanced by strengthening the intermediary institutions in this series. In Ethiopia, SNV

<sup>2</sup> The information in this section is based on SNV’s home page; <http://www.snvworld.org/EN/REGIONS/ESA/Pages/default.aspx> and author’s interview with SNV on February 3, 2010.

organizes coordination committee meetings once every three months. Those attending include stakeholders such as the producers, processors, exporters and retailers in each value chain.

### **3. Potential of the Food Industry**

#### **3.1 South African firms**

Several South African food and beverage manufacturers have invested in eastern African countries. SAB Miller, which has a well-established presence in South Africa and whose head office is at present in London, is one of the world's leading beer manufacturers. Its brewing and beverage operations cover 14 African countries, and are controlled from the firm's Johannesburg office, with a further 19 countries covered through strategic alliances with the Castel group. In eastern Africa, SAB Miller owns 33% of Tanzania Breweries and 60% of Nile Breweries (Uganda).

In 1993, SAB Miller participated in an auction process to privatize 50 % of Tanzania Breweries, a company that was originally established in 1930<sup>3</sup>. In 2001, Tanzania Breweries agreed to brew and distribute East African Breweries (EABL) brands in Tanzania. EABL acquired a 20% holding in Tanzania Breweries while SAB Miller took a 12% shareholding in Kenya Breweries, an operational company of EABL. Tanzania Breweries enjoys an almost monopolistic status, and its market share exceeds 80%. Between 2001 and 2008, the company succeeded in increasing its sales threefold. Tanzania owns three breweries which together employ 1500 workers. About 25 % of the company's barley and malt are procured in Tanzania. SAB Miller is supplying sugar from the South African-owned firm Illovo Sugar Tanzania. Tanzania Breweries is listed on the Tanzania Stock Exchange. Even though SAB owns only 33% of the stock, a substantial share of the company's management is carried out by SAB executives.

Another South African food giant, Pioneer Foods, has invested in Zambia, Uganda, Namibia and Botswana. Pioneer Foods has been put together by Sasko, Bokomo Foods, Agri business and Ceres Beverage Company, and is an important player in several industries,

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<sup>3</sup> The information in this section is based on SAB Miller's home page: <http://www.sabmiller.com/index.asp?pageid=2> and author's interview with Tanzania Breweries on September 7, 2009.



including grain-based staple foods, bakeries, breakfast cereals, biscuits, instant mash potato and soy products, animal feeds, chickens, eggs, and fruit juice<sup>4</sup>. In Uganda, the poultry rearing firm Bokomo Uganda is wholly owned by Pioneer Foods. According to an executive of the Agri business subsidiary of Pioneer Foods, the factors that impelled the company to invest in Uganda were the availability of market opportunities (including export market in Rwanda), political stability and better infrastructure.

### **3.2 Local food manufacturers**

The study has identified the local food manufacturers that have captured a significant share of the east African market, and in this section, Bakhresa Group of Tanzania, and Nas Foods of Ethiopia are taken up as examples. The Bakhresa group of companies consists of eight companies located in Tanzania, Kenya, Uganda, Malawi, Rwanda and Burundi<sup>5</sup>. The group covers a wide range of food business enterprises, ranging from flour milling and grain milling to mineral water, juices, ice creams, biscuits and bakeries. The group also operates a packaging and transport division. With a turnover exceeding US\$100 million, the group is nowadays regarded as one of the largest private firm in Tanzania. The group was established in 1975 as a small-scale restaurant, bakery and ice cream business by the Tanzanian industrialist Said Salim Awadh Bakhresa. The founding family continues to maintain both possession and management control. The group's brand name AZAM has become very popular in Tanzania. In 2007, the group embarked on fruit juice production, and obtains its pineapple, mango, and orange requirements entirely from domestically grown fruit. The group contracts production to farmers as well as operating its own farms.

NAS Foods, which began biscuit production in 2002, is the biggest biscuit manufacturer in Ethiopia and employs 1000 workers<sup>6</sup>. NAS Foods was established in 2000 by the Nasreddin family which owns the Nasco Group, a Nigerian conglomerate. The factory of NAS Foods produces on average 25 tons per day of biscuits, in over 20 varieties. It works six days a week, in a round the clock operation consisting of three eight-hour shifts per day. In terms of raw materials, domestically-grown wheat is used, along with locally supplied sugar.

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<sup>4</sup> The information in this section is based on Pioneers Foods' home page: <http://www.pioneerfoods.co.za/> and on the author's interview with a representative of Pioneer Foods on September 2, 2009.

<sup>5</sup> The information in this section is based on Bakhresa Group's home page: <http://www.bakhresa.com/> and on the author's interview with a representative of the Bakhresa Group on September 7, 2009.

<sup>6</sup> The information in this section is based on author's interview with a representative of NAS Foods on February 3, 2010.

### 3.3 The rise of supermarkets in eastern Africa.

Table 7 shows the distribution by country of three African-based supermarket chains that deal in fresh fruit and vegetables in Kenya, Uganda, Tanzania and Ethiopia. Of the East African countries, Kenya has the largest number of supermarkets. Uchumi was established in Kenya in 1976 by three government corporations, and is now one of Kenya's biggest retail firms, employing over a thousand workers and operating eleven branches in Nairobi and three in Karatia, Meru and Eldoret respectively.

Nakumatt, another important supermarket chain in Kenya, was established in 1987 and is the country's largest retailer. It has 19 stores in Kenya and is currently expanding into Uganda and Rwanda. Nakumatt stocks a wide range - over 50,000 items at all – and it aims to equip its stores with world-class shopping floor layouts and amenities.

**Table 7 Supermarket chains in eastern Africa**

	Nakumatt	Uchumi	Shoprite
Kenya	19	14	0
Uganda	1	1	2
Tanzania 1)	0	0	4
Ethiopia	0	0	0

Note: According to the executives of Nakumatt and Uchumi, they will open the stores in Tanzania in 2010.

Source; <http://www.nakumatt.net/>, <http://www.uchumi.com/>, <http://www.shopriteholdings.co.za/>.

Uganda is the frontier so far as competition among African-based supermarket chains is concerned. Shoprite, Africa's largest supermarket chain, opened its first store in Uganda in 2000. Shoprite Uganda stocks about 40,000 items ranging from fresh fruit and vegetables to electric appliances. Following Shoprite's arrival, Uchumi set up a store in Kampala in 2002. Nakumatt is a newcomer to Uganda, having begun its business operations there as recently as 2009. Uganda also has several local supermarket chains such as Payless supermarket and Quality Supermarket.

In Tanzania, Shoprite was a pioneer having been the first to introduce the supermarket concept into the country. The first Shoprite shop opened for business in 2001. Currently Shoprite, which employs a total of 300 workers, has three shops in Dar es Salaam and one in

Arusha. Shoprite Tanzania stocks about 15,000 items<sup>7</sup>. In terms of fresh fruit and vegetables, Shoprite deals with about 600 items. Freshmark, the Shoprite Group's wholesale fruit and vegetables procurement and distribution division, is regarded as the biggest supplier of fruit and vegetables in Africa (Shoprite Holdings [2008]). Freshmark employs a Trading Manager who compiles orders to each country on a daily basis. In Tanzania, local procurement ratios are 25% for fruit and about 60% for vegetables. The home fruit procurement ratio is relatively low because there is a home demand for types of fruit, such as apples, that cannot be cultivated in Tanzania. Shoprite Tanzania deals directly with 55 farms and obtains the remainder of its fruit and vegetables through agents. On the whole, supermarkets are less well developed in Tanzania than in Kenya and Uganda.

While international supermarkets have not yet established a presence in Ethiopia, there are several local supermarkets, including Banbis, Fantu, Friendship and Novis. One of the biggest supermarkets in Ethiopia is the Greek-owned Banbis Supermarket, established in the early 1960s, which operates a big store occupying three floors<sup>8</sup>. Banbis was nationalized in 1975 and then privatized in 2000, and re-acquired by its former Greek owner. Banbis stocks about 10,000 items, about one third of which are locally sourced. Many of the fruit and vegetable items sold by the store are local produce, obtained through agents.

Fantu Supermarket began its existence in 1983, as a small store selling mainly fruit, vegetables and meat<sup>9</sup>. Fantu Group, which now operates three stores, has established conglomerates for a range of businesses, including dairy farming, the management of a hotel, and trading in imports. All the fruit and vegetables handled by the Group are obtained from domestic suppliers, mainly through the wholesale market but also partly through dealing with farms directly. The Group has achieved vertical integration in the dairy sector, being responsible for production, processing, and retailing through its own stores.

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<sup>7</sup> The information in this section is based on author's interview with Shoprite Tanzania on September 8, 2009.

<sup>8</sup> The information in this section is based on the author's interview with a representative of Banbis Supermarket on February 5, 2010.

<sup>9</sup> The information in this section is based on author's interview with a representative of the Fantu Group on February 5, 2010.

## **4. Conclusion and Further Studies**

As mentioned above, it seems that the value-chains approach is an effective way of analyzing the food industry in eastern Africa. Especially, the demand-driven approach is useful for providing an introduction to the growth of agriculture and the food industry. In recent years, domestic demand, via supermarkets, has begun to exert a considerable influence on agricultural production and food supply. Compared with the countries in southern Africa, or Kenya, supermarkets have not yet developed in Tanzania and Ethiopia. However, it is highly likely that supermarkets will appear and will exert considerable influence in both countries in the future.

The food industry is highly diverse, and this makes it difficult to comprehend it in its entirety. Nevertheless, some useful generalizations can be made. In this paper, some examples of food manufacturers and supermarkets have been introduced with reference to Tanzania and Ethiopia. The next step in the research will be a detailed analysis of the flows that link production, processing, and consumption, focusing on industries such as beer brewing and fruit and juice processing.

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