

# IVORY COAST 2019 ARE WE ONE?



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FLAIR COLLECTION

GAME CHANGERS





# IVORY COAST 2019 ARE WE ONE?

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## IPSOS FLAIR: UNDERSTAND TO ANTICIPATE

### **Henri Wallard**

Deputy CEO

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Flair in French is the ability to discern something, often associated with perceptiveness. Ipsos's goal is to help in understanding the multiple facets of individuals, along with markets and societies across the world.

Thousands of pieces of information are analysed and transmitted every day by Ipsos. In the Ivory Coast, as in the other 89 countries where we have a presence. But what happens to them 'after'; after the findings have been presented, the report sent, after the clients have made their decision?

All that information reflects a society and an era, along with values, perspectives..., anything that is a source of motivations and choices, in other words, anything that determines and organises the decision-making process, anything that helps to create loyalty or track disloyalty. Identifying the mechanisms that drive viewpoints and tensions among citizen-consumers, that is the challenge for Flair.

Viewing study results as sociological indicators, Ipsos analyses them to come up with a mapping of structuring and emerging trends. Each study subject is an opportunity to identify consumers' adjacent concerns: talking about a brand, a service or a medium also involves each person talking about his or her own life, feelings and convictions. The same applies in public and social affairs, since

Ipsos Flair was born out of a desire to highlight the rich potential of the various Ipsos business units, combining their different types of expertise to propose a theory of the consumer and anticipate change.

We are delighted to present our first Flair for the Ivory Coast, the first also for French-speaking Africa.

## EDITORIAL

### **Yves Bardon**

Ipsos Flair Programme Director –  
Ipsos Knowledge Centre

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Africa, like Latin America or Asia not so long ago, gives the impression of being “The Place to Be”, even to the extent of being a New Eldorado for international brands and groups. However, few regions in the world have been so heavily impacted by conflict, brutal alternation between progress and backsliding, hope and war, as though crises and sudden jolts were a normal way of life.

From this viewpoint, Ivory Coast is a metaphor for Africa: after some thirty years of prosperity that started in 1960 (year I of the country's independence, proclaimed on August 7th 1960), the mechanism came to a halt in the 90s, with one political, social, economic crisis after another, gradually worsening until recent years.

But since 2015, there has once again been talk of growth, momentum, progress, rekindling the desire to believe in the country, to believe that Ivory Coast will reconnect with development and – once again – get back on the path to development.

The signs of recognition of a developed country are clear:

- On an economic and social level: a momentum favouring the creation of a true middle class enjoying increased purchasing power, with a model that excludes no one, freeing itself from alienating customs, for women in particular.

- In terms of infrastructures: routes and transportation systems connecting cities, encouraging links between regions, reducing the disparities between rural and urban zones, creating the conditions for a balance between incomes and life style.
- On an architectural level: development of cities, creation of megapolises, construction of spectacular urban centres (green towers, shopping malls, theatres, operas, museums, stadiums, etc.), upscale residential zones, pairing innovation with a high level of environmental quality.
- In terms of marketing and advertising: increased number of brands, communications and associated media, creativity and fracture, retail and new services or channels.
- In cultural terms: capacity to influence or create trends, generate fashion phenomena (like “Gangnam Style”, which attracted over a billion views in under six months in 2012, or specific styles like Bollywood in India).
- On the political level: a multi-party system, where human rights, freedom of thought and opinion, free expression of opposing convictions, are possible.

Clearly, Ivory Coast corresponds broadly to those criteria, particularly on an economic level with the launch of responsible development programmes, on a social level with many reforms in the teaching field and the setting-up of experimental pilot schemes, on a cultural level with a particularly expressive language, an inexhaustible source of inspiration for advertising, and a characteristic dance (*the coupé décalé*), which is being exported to Europe, in terms of new trends with wax print, which has established itself as a must in contemporary fashion. The slogan of the new office of the Conseil de l'Ordre des Architectes, “l’audace du rêve” (daring to dream), speaks volumes about its ambitions and more generally about the energy driving it.

As we can see, Ivory Coast has many assets to help it return to and pursue a forward movement, in a context of considerable disparities between social classes and income levels, with the average income established at under 600 euros. But its desire for development can no longer translate into reality without taking the environment into account; deforestation has reached a critical level, the country has lost over 80% of its forest area in half a century, one of the fastest deforestation rates in the world, alongside Brazil, the Amazon and Indonesia. Ivory Coast's support for the Cocoa Forest initiative and the thought going into funding "zero deforestation" cocoa production are all encouraging signs.

Within this context where everyone wants to believe in recovery but where tensions are worsening at lightning speed, it can be useful to take a step back to identify what is solid and structuring, or fragile and needing to be consolidated.

Our first Ipsos Flair in Ivory Coast comes at the right time to describe what motivates citizen-consumers: their expectations, desires and values within a sensitive context, less than two years before the presidential election.

That is the goal of Ipsos Flair, an idea that came to light in 2005 to provide our clients with a decision-aid tool, thanks to the Ipsos experts working in the country:

- What opinion do people have of brands, advertising, the players in society?
- What factors enable an understanding of messages and attitudes (favourable / unfavourable, confident / positive / critical, etc.)?
- What are the keys to success for strategists?



Our title, “*Are we one?*”, a translation of the Ivorian expression “*On est ensemble?*”, provides a partial response. Much more than an observation, it is a message expressing a desire for engagement, mutual support, assistance; in a word, fraternity. It is the wager to be risked if growth is to be more than just economic, and for it to succeed on a human level; it is a question that also implies adopting an unambiguous position.

It is also a tribute to the speech made by President Houphouët Boigny on the day that Ivory Coast proclaimed its Independence. Although given almost sixty years ago, it has lost none of its relevance or urgency: “*The extra that we must bring to this torn and worried world is our sincere love of peace and justice. To accomplish that task, French-speaking Africans, all Africans, must unite and plan to move their country away from a focus on competition, in order to make this Africa a land of reconciliation of peoples. That is our vocation*”.

*The cover photo reflects the seriousness and gravity of the question; it also says that Ivory Coast is not an ageing country, unlike many others in Europe and Asia.*

## VIEWPOINT

### **Florence de Bigault**

Cluster Manager,  
Francophone Africa

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## THINGS WILL BE FINE!

Independent since 1960, Ivory Coast has already acquired real experience of what builds and destroys a nation and its people.

Unlike many of its neighbours, Ivory Coast underwent thirty years of exceptional prosperity, a sort of post-colonial 30-year boom during which the State, embodied by its President-founder Felix Houphouët-Boigny, occupied a central place as planner, job provider, more or less fair redistributor of income from cocoa and coffee.

A blessed era in which Ivory Coast and its plantation economy were envied, or even viewed with jealousy by neighbouring countries, which were struggling to find their way through this complicated period of hurried decolonisation of French West Africa.

A veritable Eldorado for many peoples in the sub-region, Ivory Coast saw its immigrant population go from 12% in 1962 to 28% in 2014 according to the latest national census.

Indeed, from 1960, the land of Elephants chose a strong immigration policy to promote Houphouët's two key ambitions: the country's economic development on the one hand, and West African sub-regional integration under the aegis of Abidjan, on the other.

In the 90s, Ivory Coast's prosperity was blocked: an international drop in cocoa prices, the State was increasingly in debt, then devaluation of the CFA franc in 1994. Rapidly, the economic crisis turned into a land and social crisis. The demographic dividend represented by strong immigration, mainly from Burkina Faso and Mali, transformed into an identity problem.

In a new dialectic of "and" versus "or", the concept of Ivorianness appeared, questioning who was legitimately Ivorian, opposing natives and foreign-born residents, southerners and northerners, the big family of Akan people and the Sahelians.

Then Ivory Coast underwent political crises in the 2000s, a mock coup d'état with General Robert Gueï, ironically nicknamed "Santa Claus in battledress." The politico-military crisis triggered on September 19th 2002 led to a massive exodus of almost 1.7 million people, the abandonment of conflict zones by state administration along with private companies, and the destruction of many economic infrastructures. The conflict brought about a division of the country between a south controlled by the State and a north controlled by rebellion.

During those 10 years of conflict, economic growth turned negative (-0.4 %), much lower than that of other countries in the WAEMU (4.1 %) and Sub-Saharan Africa (4.9 %). Many companies held by non-nationals left the country or considerably reduced their business there.

And to finish, Ivory Coast presented itself with a tragi-comedic post-electoral crisis. Between November 2010 and March 2011, Abidjan saw the cohabitation of "two presidents in a single chair": Alassane Ouattara stuck in the Hôtel du Golf, known as the "smallest republic" to partisans of Laurent Gbagbo, while supporters of Alassane Ouattara referred to the residence where Laurent Gbagbo had taken refuge as the "bunker".

That was only seven years ago. Already so far away for a country where 42.7% of the population is under 20.

With this dramatic decade now behind it, Ivory Coast has quickly recovered to the point of featuring, in the past 3 years, among the top 3 of the planet's most dynamic growths: 8.8% in 2017.

These days, the general watchword is emergence. Decided on by President Ouattara, the national development plan (PND) 2012-2015 laid down the bases for the transformation of Ivory Coast into an emerging country, with a view to 2020. 94 major projects were selected due to their innovative, structuring, large-scale nature, with a considerable socio-economic impact.

The construction projects are huge and take the form of a true national recovery.

- The economy, with the return of foreign investments and the diversification of productive industries.
- The fight against poverty. Between 1985 and 2008, the percentage of the population considered to be living under the poverty threshold more than doubled, exceeding 49% on exiting the post-electoral crisis.
- National reconciliation between North and South, which remains fragile.
- The recreation of democracy, at the very time when the political class seems to be divided as the 2020 presidential election approaches.
- The restoring of Ivory Coast to its place in the concert of African nations, and the normalisation of relations with its neighbours.

The return of the African Development Bank to Abidjan's Plateau business district, major infrastructure creations such as the HKB bridge, the victory of the national football team, known as the Elephants, in the 2015 Africa Cup of Nations, all testify to this rediscovered pride.

Ivorians have, despite themselves, become experts in reconstruction. Despite the collapse of the economy, the looting and destruction, the fear, hatred and feeling of revenge, the Ivorians have held on.

They have wept and buried their dead, they have resigned themselves to living alongside each other, and more than just living together, they have rebuilt the country.

Household consumption has gone from around USD 16.6 billion in 2010 to over USD 23 billion in 2016. But the recovery is still long in coming. According to the Institut des Statistiques Ivoiriens, the general level of average consumption was 386,215 FCA (€ 589) in 2015 and 461,243 FCA (€ 703) in 2002.

For the Ivorian people, so exuberant and yet so modest at the same time, emergence is a “trendy” term which means that your head is out of the water but you haven’t reached the other river bank yet.

Emergence signifies progress, realisation, hope.

Beyond Ivory Coast, isn't the whole of Africa forging ahead on the path of emergence?

The Ivoirians have a typical saying, “*Ça va aller*” (*it'll be fine*), to end any conversation, positive or negative. It's a way of saying that everything will be better, regardless of the situation. *Ça va aller* is the “collective pick-me-up” used to give oneself courage, to not give up in the face of challenges that are nevertheless huge.

On the path of emergence, Ivorians are now stronger. They know just how fragile their solidity is and just how solid they are despite all their fragilities.

## DISCOVERY REPORT

When launching Ipsos Flair in Ivory Coast, we asked our experts what they found most surprising in the country... A few answers:

### IT'S INCREDIBLE THAT...

- You can order a taxi online in Ivory Coast through TaxiJet. It's a bit like Uber. Their promise is: BOOK YOUR TAXIJET IN 3 CLICKS.
- Today, you can create your own company in 24h in Ivory Coast (CEPICI).
- The financial sector is increasingly re-energised. Ivory Coast now has 28 banks, the highest number in the WAEMU zone.
- After the 3rd, soon to be 4th bridge in Cocody bay, followed by the Abidjan metro, the current revival of infrastructures promises a new economic boom.
- Digital technology has an increasing place within the population, with a new way of living and doing business thanks to innovative digital tools (smartphone, e-commerce, mobile money, mobile banking).
- These days it's possible to have a credit card with your mobile money operator. Orange Money recently launched its Visa card to enable its mobile money clients to pay by Visa card.



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ARE WE ONE?



# USER MANUAL

*"IF YOU WANT TO GO FAST, WALK ALONE, BUT IF YOU  
WANT TO GO FAR, LET'S WALK TOGETHER."*

IVORIAN PROVERB

ARE WE ONE?



# GROWTH, FOR WHAT PURPOSE?

## **Gustave Agbodan**

Head of Marketing Understanding

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With GDP growth expected to reach 7% in 2018 and 2019, Ivory Coast continues to be one of the most dynamic economies in Africa. Turning its back on the post-electoral crisis of 2010, Ivory Coast, the traditional economic lungs of the WAEMU zone, has made a name for itself through exceptional economic performances. Indeed, from a growth rate of -4% in 2011, the country reached 7.6% in 2017 peaking at 10.7% in 2012 and 9.2% in 2015 (according to the World Bank).

In its latest report<sup>1</sup> entitled *“At the gates of paradise or how Ivory Coast can catch up on technology”*, the World Bank reveals that the country is number 2, as concerns speed of growth in Sub-Saharan Africa, and no. 4 internationally.

What are the pillars of this growth and, above all, are its benefits being shared, in other words able to reduce the gap between the wealthiest people and all the others? That is the question. If they are being shared, then we can talk in terms of real development, the kind that creates the conditions for the emergence of a middle class, otherwise, the paths of exodus will open up...

## THE PILLARS OF GROWTH

Economic performance results from several factors. Within an economic environment upset by the drop in oil prices, the country has benefited from a rebound of agriculture.

Cocoa (Ivory Coast is the leading world producer) has benefited from relatively stable prices in recent years. Meanwhile, the State has set up a policy of diversification of agricultural resources through the promotion of cotton and cashew nuts, for which national production has increased.

Alongside this brighter agricultural picture, there has been a boom in Building and Public Works, essentially due to ambitious projects launched by the State to catch up on the decade of crisis: construction of roads, bridges, schools, health centres etc. The efforts made by the Ivorian authorities with a view to improving the business climate should also be taken into account, since it attracted USD 481 million in direct foreign investments in 2016.

The national development plan (PND 2016-2020) does indeed aim to make private investment a driver of the country's economic growth. To facilitate business, a programme of dematerialisation of services and administrative procedures has notably been set up.

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**"Mass unemployment, the high rate of poverty (46%), and growing emigration are undermining the social cohesion pact in this country."**

## GROWTH WITHOUT DEVELOPMENT

Quoted as an example and acclaimed in all the big international economic forums, economic growth is still tainted with grimmer realities for Ivorians. The records beaten in the past six years were supposed to contribute to the rapid improvement of living conditions and wealth creation for the population. However, mass unemployment, the high rate of poverty (46%), and growing emigration are undermining the social cohesion pact in this country still weakened by the memory of recent crises.

At the start of the year, the Director of the NGO ASAPSU (Association de Soutien à l'Autopromotion Sanitaire Urbaine), Sanogo Epse Koné Pete Solange, criticised *"an improving growth rate, but which doesn't match the level of development of communities."*

She was speaking during a parallel workshop presided over by the Resident Representative of the High-Commissioner for Refugees (UNHCR) in Abidjan, Mohamed Touré, in the setting of the 2<sup>nd</sup> African Forum for the African Development Bank. As a reaction to this, the State hopes, through a new national development plan, to finally achieve a form of growth that is truly inclusive, with the most vulnerable Ivorians still waiting for the country's economic growth to produce more tangible results in their everyday lives.

In March 2018, the World Bank also assigned one hundred million dollars to help reduce the poverty rate in the country with, for example, a quarterly remuneration favouring 35,000 households.

As for salaried employment, which has progressed 25% in four years, it does not seem to be going beyond a proportion of 10% of the total job market, with the vast majority of jobs remaining in the informal sector, with no retirement or social security.

If unemployment persists, despite the heavy economic growth, it is because of the weak capacity of growth to create lasting, quality jobs. Indeed, the majority of jobs created in recent years in Ivory Coast are precarious and/or require little in the way of qualification, which explains why unemployment mostly affects young graduates.

According to a recent survey by the AGEPE (Agence d'Etudes et de Promotion de l'Emploi)<sup>2</sup>, the unemployment rate for the uneducated is 6.4% c.f. 42.9% for people holding a masters degree. *"For every ten new entrants on the work market, only four find a job and just one in a registered company"*, warns M'Baye Babacar Cissé, coordinator for the United Nations in Ivory Coast.

Ivorians note with sadness that their young people are now third most likely in West Africa to take clandestine routes to Europe, after the battalions of illegal immigrants travelling from Nigeria and Guinea-Conakry.

According to statistics from the International Organisation for Migration (IOM), emigration from Ivory Coast is qualified emigration, with one third of Ivorian emigrants holding a higher education degree. This qualified diaspora primarily consists in health care personnel and teachers.





## IVORY COAST CONFRONTED WITH SOCIAL CHALLENGES

It must be acknowledged that poverty is greater than in the 1990s: 46% of inhabitants have never attended school, 20% suffer from chronic malnutrition and only 5 to 6% benefit from social security.

The educational system is poor and fails to provide a skilled manual workforce. Employers complain about not finding the right profiles, with the training provided in prestigious higher education establishments and universities not always taking into account the needs of the job market. An example? Certain courses leading to the Brevet de Technicien Supérieur (BTS) have no outlet onto the job market.

The 2017 baccalaureate session produced a success rate of 44.97%, an improvement since 2011. But only 240,000 candidates took part in this 2017 baccalaureate session on a nationwide level. Bloomfield Investment observes that in 2016, the rate of completion of primary education was around 63.1% in Ivory Coast compared to 72.6% for Africa.

In its study *Economic Prospects in Africa 2017*<sup>3</sup>, the United Nations Conference on Trade and Development noted that *“the Ivorian educational system is among those performing least well in Africa, with Ivory Coast ranking last out of 44 countries during the 2011 evaluation of student knowledge conducted by La Francophonie, then ranking 41st in 2013”*.

Same observation in the health field. *“The health situation is still concerning because of high morbidity and mortality rates linked to malaria and AIDS”*, according to Perspectives Economiques.

The main problem is still the insufficient health care facilities, accentuated by the socio-political crisis. This insufficiency is also linked to the problem of financing the health sector, with the stagnation of the Health Ministry's budget, the sheer scope of poverty and the non-existence of a system to cover the risk of illness.

The life expectancy of an Ivorian is currently 52 years, the lowest anywhere in the West African Economic and Monetary Union (WAEMU). Reforms are expected to correct the incompatibility of job training, encourage companies to hire and bring about a richer growth in jobs. Companies that sell their products on the Ivorian market expect the economic growth to be expressed in the field by a significant increase in the purchasing power of households and an expansion of the middle class.

Failing that, brands continue to adapt their product offerings to low-income populations, since the growth potential is there: at the lowest level of the middle classes. Thus, the development of shopping malls, of high-added-value products and services remains slow, subject to the stagnation in the income of Ivorian households.

This growth, one that doesn't benefit the majority of people, seems increasingly difficult to bear, and discontent is increasing proportionally. It can be seen on the social networks as well as on college campuses or at markets: Ivorians are now raising their voices and demanding the first fruits of the national recovery.

The major gap between macroeconomics and microeconomics, between a galloping economy and a majority of Ivorians who struggle to make ends meet from the middle of the month, represent a real threat for the country.

Recently raised by economist Mamadou Diallo, the question applies not just to Ivory Coast, but also to an entire continent: *"how to translate an economic indicator into a tangible momentum bringing shared prosperity?"*.

ARE WE ONE?



# THE COCOA PARADOX

## Issa Tahirou

Senior Researcher

Marketing Understanding

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"Brown gold" constitutes a major economic sector in Ivory Coast. According to the World Bank, cocoa represents 15% the country's GDP and over 50% of its export revenue. Around 5 million Ivorians out of 26 million depend directly or indirectly on the cocoa industry.

Over the past five years, the continued increase in production has brought a 28.6% increase in producers' overall gross income, at 2,013 billion CFA francs (slightly over three billion euros), as opposed to 1,565 billion during the 2015-2016 season.

However, while Ivory Coast is the leading producer and grinder of cocoa beans, it only processes 35% of them, and still primarily in semi-finished form. Only 5% of its cocoa beans are transformed into a finished chocolate product in Ivory Coast. On the industry value chain, "brown gold" represents grinding and the manufacture of cocoa butter, a stage that is not enough to increase the added-value of the Ivorian contribution. The ICCO (Internationale Coffee and Cocoa Organisation) calculated that an Ivorian cocoa bean producer receives only 6% of the value of a chocolate bar.

Is that not where the drama of Ivory Coast lies? Although a leading cocoa producer, the country has failed to develop a processing industry sufficient to establish a domestic mass market and fight back against imported products.

## COCOA IS TOO EXPENSIVE

In Abidjan, on the Boulevard de Marseille or in the industrial zone, you have to have a bad cold not to smell the captivating odour of the cocoa bean. It excites the taste buds of adults and children alike, yet the majority of Ivorians have never known the real taste of chocolate. Indeed, according to an Ipsos Ivory Coast study conducted in October 2017, 38% of urban households claimed to have consumed chocolate bars at least once in the year.

Cocoa consumption is around 0.97 kg per person worldwide, compared to 100 grams per Ivory Coast inhabitant and 1.8 kilos in Europe. While the number of consumers is low, the consumption volume is too: on average Ivorian consumer buys 500 grams of chocolate a year, as opposed to 3.6 kilos for a French person. The cause is a weak tradition of eating chocolate, but also high prices of 1,500 CFA francs (2.30 euros) for a chocolate bar produced in Ivory Coast and 3000 to 4000 CFA francs (6.10 euros) for an imported bar.

In reality, the domestic Ivorian chocolate market remains modest, largely occupied by imported brands, positioning chocolate as a premium product. In a recent report on Abidjan.net, a taxi driver said: *"I only eat chocolate once a year because it's too expensive for me."* Paradoxically, Ivory Coast is the leading world producer of cocoa, with a market share of 41%!

## COCOA ISN'T CHOCOLATE

Ironically, this is like a French winegrower unfamiliar with the taste of wine, a Colombian grower who has never drunk his own coffee, a Saudi importing his petrol. Yet, in Ivory Coast and the sub-region as a whole, people love chocolate. The coffee-cocoa council, whose goal is to promote cocoa locally,

can testify to the craze for the product, particularly among children. Its “made in Ivory Coast” chocolate-tasting caravans have been a great success.

A potential market of 350 million inhabitants of ECOWAS could open up to a cocoa-processing and chocolate-producing Ivory Coast. According to Euromonitor, chocolate sales should increase by 10.4% in Nigeria, a neighbouring country where chocolate-producers already recorded a 286% increase in their income from 2007 to 2012, mainly through imported products. A real godsend for the Ivorian economy.

Transforming cocoa into a chocolate product now constitutes a national challenge. Afrikipresse found, the country’s current rate of transformation is 560,000 tons. The goal is to reach a 50% transformation rate, i.e. 900,000 tons by 2020. Transformation capacities are progressing, thanks to foreign and local investments. Swiss firm BARRY CALLEBAUT, the American CARGILL, OLAM in Singapore, the French CEMOI, the Ivorians CHOCO IVOIRE and SAF are all helping to put Ivory Coast at the top of the list of cocoa-grinding countries.

The challenge now lies in taking transformation a step further, offering finished products or even local brands, affordable and adapted to the needs of Ivorian consumers, including instant chocolate powders, spreads, mini-bars under 80g, local recipes (mangoes, passion fruit, banana, piment orange, lemon).

## “MADE IN IVORY COAST”, A CHALLENGE, A LABEL, AN OPPORTUNITY

The company “Monchoco” was created in 2016 by Dana Mroueh, a woman of Franco-Lebanese origin, living in Abidjan. With her eight employees, she makes artisanal and organic chocolate, featuring a bitter taste close to that of a cocoa bean.



Tafissa, which means *“licking your fingers”* in baoulé, a company founded by Olga Yenou (former director of the Cemoi factory), produces powder and spread.

Created in 2014, Instant Chocolat is specialised in artisanal chocolate manufacture. The young company made the wager of producing original products with a high-end positioning: chocolate bars with ginger, banana, corn flakes, chilli, Penja pepper, baobab. The start-up produces plain chocolate bars sold in supermarkets, but also artistic pieces in the form of Zaouli masks, Afro combs or stools. From 5 tons/year sold in 2016, the company now sells 1.5 tons of chocolate/month and has become the leading 100% Ivorian chocolate producer to enter the Duty Free aisles in Abidjan's FHB airport.

As we have clearly seen: Ivory Coast's cocoa history is an African fable with a bitter taste. How does Africa, so rich in agricultural raw materials, continue to import 35 billion dollars of food products a year, a figure that should reach 110 billion dollars by 2025? Like the development of the cacao industry, Ivory Coast could develop its own dairy products in order to limit imports of powdered milk. The local fruit juice market could be further developed thanks to varied and abundant national production.

Some 50% of Ivorians live in rural areas, zones that are heavily dependent on agriculture for survival. Therefore, the path to follow in order to improve the quality of life in the rural environment lies in transforming agriculture. Yet low productivity, the bad condition of rural infrastructures, digital exclusion, lack of access to modern tools and to agronomic data have resulted in growing disinterest in the agricultural world among young rural-dwellers.



## A CRUCIAL STAKE

Ivory Coast must invest massively to commit to the path of agricultural industrialisation and add value to all agricultural products. The African Development Bank chose Ivory Coast to launch its “ENABLE Youth” programme in West Africa. The goal is to strengthen the capacity of young Ivorian graduates to create companies all the way down the agricultural value chain. By means of ag-business project incubators, they will be trained in the skills involved in the farming profession. After incubation, graduates will receive support for financing their own company. Enable Youth aims to produce 10,000 young agricultural entrepreneurs per country (including Ivory Coast) in the next decade.

An initiative to be followed in terms of developing the Ivorian ag industry, mass-creating jobs in villages, countering the rural exodus and the growing youth exodus. With Abidjan’s population of 6 million and 4 other regional cities harbouring potential consumers, agriculture has the opportunity to become an industrial activity focused on the production and transformation of food products, creating wealth for owners and decent jobs for the workforce.

ARE WE ONE?

## GROWTH THROUGH FASHION

### **Carine Bamba**

Client Service Organisation

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The first wax fabric (a waxed cotton textile inspired by Indonesian techniques) was introduced into Ivory Coast 150 years ago in Grand-Bassam by a Dutch trader by the name of Van Vlissingen; these days, the high-end brand Vlisco – which any middle-class Ivorian aspires to – likes to refer to this legendary figure. Thanks to its location in the centre of the sub-region and its openness to aesthetic influences, Ivory Coast soon became the capital of pagne, and especially wax.

The making of a wax collection, the way it is received by the general public, demonstrates Ivory Coast's capacity to absorb and reinvent techniques and fashions that originated elsewhere. Pagne has thus become a prosperous industry in Ivory Coast, with West Africa consuming 90% of its production. West African and Afro-French designers set off to take on the world, particularly Paris, where wax has been trendy ever since Xuly Bêt became the first African designer to introduce it into fashion, along with Maison Château Rouge, Bazara' pagne and Nash Prints It, which have made it popular among a Western customer base seduced by these comfortable, luxurious and brightly coloured materials.

Celebrities, from Beyonce to Michelle Obama, have put wax in the spotlight, and it can be seen on podiums and catwalks, from Burberry to H&M. A victim of its success, counterfeiting now threatens its economic and cultural success.

## A LITTLE HISTORY

Wax pagné, a fabric that first appeared in the mid-19th century, is the fruit of creative connections between Europe, Africa and Asia. It represents fashion as an art of reinventing and culture-blending at the same time.

Originally, Javanese patterns and Indonesian batiks were sold by Dutch traders along the African coasts before arriving in Europe. Ashanti mercenaries from what is now Ghana, who had gone off to fight in the colonial troops in Borneo and Sumatra, brought some back for their wives. In Africa, these fabrics formed from brightly coloured strips of cotton very quickly appealed to a broad audience and pagne was adopted as the quintessential African garment. However, wax pagne almost didn't develop in Africa. The first Javanese pagnes, made from very fine cottons, were not suited to the needs of African women, who were always on the move and were looking for solid, heavy and lasting fabrics.

Given the enthusiasm for these shimmering fabrics and to adapt to demand, the Dutch decided to produce their own wax adapted to suit the aesthetic and quality criteria of African pagne. The making of wax, the emblematic fabric of West Africa, was born of this fusion of Indonesian, Dutch and African techniques.

Whether artisanal or industrial, the manufacturing process is complex: deliberate cracked effects, bubbles caused by the application of a wax reserve on the back and front, make each metre of fabric unique. Pagne is much more than just a piece of fabric though. Through its contact with African women, it created an identity for itself, it became a means of cultural expression uniting customs, traditions and personality enhancement.

## WAX, SYMBOL AND MEDIUM

In Ivory Coast and more broadly in West Africa, wax pagne and shimmering colours are a part of everyday life. It speaks, it conveys messages, whether for births, baptisms, dowries, weddings, and even funerals.

The patterns, colours and layouts are all sentences. A woman superimposing two pagnes means a heart already taken, a single pagne knotted at the waist is a heart to be taken. The patterns carry meaning. For example, the “capable husband” pattern expresses the fact that the head of household takes good care of his wife. Indeed, a pagne becomes a classic when it takes on a name. It is often retail-wholesalers who, by naming it, ensure its success. The name of the pagne generally refers to popular culture: Grotto, which literally means “the high from on high”, celebrates social success, “Abidjan is technical” to state that you have to be mischievous to make your way in life. Major societal events, such as elections, are generally commemorated with a special edition pagne.

As the Senegalese novelist Ken Bugul once wrote, African women continue to think that *“the dream of any woman is to have your own Dutch wax, a sign of respect and power”*.

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**"The Ivorian pagne industry and its designers are attempting to resist through awareness campaigns on quality and by frequently reinventing their patterns."**



## WAX, IMAGINATION IN POWER

The real risk would have been to confine pagne to tradition and gradually cut it off from a modern Africa in turmoil. With half the population of the sub-region under 25 years old, surfing the web and open to international influences, wax pagne could have been relegated to their mother's wardrobe.

The leader of pagne in West Africa and which produces a part of its production in Abidjan, the Uniwax company (a subsidiary of the Dutch group Vlisco) has helped to make wax contemporary again. The Dutch group conceptualised this trend in the expression *"New Tradition"*.

In the 90s, the organisation of the "Golden Scissors" contest in Abidjan marked a turning point in the way wax was viewed. Tailors were asked to present some modern, feminine and creative cuts. Contemporary wax fashion primarily concerns the big African capitals like Abidjan, Accra and Dakar, then the diasporas who have the local tailor copy ready-to-wear models in wax.

The Ivory Coast-Burkina-based tailor Pathe'o revived the wax African shirt and has dressed many African leaders. Currently at the head of a network of shops in the major capitals of West and Central Africa, Pathe'o likes to resituate his work as a tailor within African society: *"for me fashion is primarily a job, it's about living off your job and enabling other people to live off it."*

These days, a new generation of African designers have turned wax pagne into a modern, trendy fabric that has become the standard-bearer for the continent. On the one hand, stars like Rihanna or Beyonce, political personalities like Nelson Mandela, the Gbagbo couple, or even Michele Obama, wear wax as an affirmation of their Africanness. On the other, certain designers are making a name for themselves. Alexandra Nack (MboaWax) dreams up colourful, modern

Afro-urban models: dresses, shirts and jackets, clutch bags, head bands, necklaces. Mademoiselle Blé has specialised in children's fashion, which she produces straight from her workshop in Abidjan. Maureen Ayité (Nana Wax), designer and blogger, attracted attention through the Facebook group *"j'aime le pagne de chez moi"*<sup>4</sup> It's no exaggeration to say that everything is being "waxed": upholstery fabrics, bags and accessories, furniture and sofas, jewellery, and even wax shoes and parasols.

With Loza Maléombho, who ranked seventh among the most promising African entrepreneurs in the magazine "Forbes Afrique", Ivorian creation has become borderless, from every point of view. Born in Brazil to a Central-African father and Ivorian-Ghanaian mother, Loza grew up between Ivory Coast and USA. She works using urban and tribal influences which have gone as far as seducing Beyoncé and influencing mainstream brands.

She also made a name for herself with "Alien Edits", a series of selfies<sup>5</sup> symbolically pointing out injustice or social issues, not forgetting her activist commitment in #BlackLivesMatter, the movement fighting anti-black racism in the USA. However, while Afro-chic fashion is invading the European scene, opening up new prospects for African designers and perhaps for the continent's textile industry, wax is under threat from counterfeits made in China. An estimated 742 million metres of counterfeits, a large share of them wax, are offloaded every year in Africa, with consumers drawn to the very competitive prices of Chinese fabrics.

The Ivorian pagne industry and its designers are attempting to resist through awareness campaigns on quality and by frequently reinventing their patterns. Whatever happens, wax continues to represent this multicultural link between Africa, Europe and Asia which, with each new era, sees positions between designers, producers, traders and buyers shuffle around.

ARE WE ONE?





# GROWTH IS BORN IN BABI

## **Pape N'diaye**

Client Service Manager Senegal

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## GEOGRAPHY OF A CITY

The capital of Ivory Coast, Abidjan is the most heavily populated city in West Africa after Lagos. With over 6 million inhabitants, it constitutes the nerve and cultural centre of French-speaking Africa. Abidjan is also the economic capital, accounting for around 60% of Ivorian GDP.

Nicknamed BABI by its inhabitants, Abidjan has always had the image of a more hectic, cosmopolitan and tolerant city than the other capitals in the sub-region. Built by the French who were looking for a deep-water port far from the yellow fever epidemics of Bassam, Abidjan currently counts over 5 million inhabitants. The fishermen's village of Ebrié on the lagoon kept expanding to absorb the permanent influx of population primarily coming from the Akan area, and then from the whole of West Africa. During its colonial boom period, then during the thirty years of the Houphouët Boigny era, hundreds of thousands of men and women hurried to Abidjan to find a better life, or even to make their fortune.

Like most African capitals, Abidjan grew without any master plan, in a permanent state of DIY. Neighbourhoods featuring opulent villas surrounded by high walls, stand right alongside precarious, unsanitary housing. The world's biggest urban lagoon is now a huge, muddled metropolis stretching over more than 2000 km<sup>2</sup>.

For the majority of the population, everything is still lacking: water, electricity, sanitation and public transport. Growing with the constant arrival of new migrants, the “add-on” districts have intensified the impression of a city that is a permanent building site, one where an increasing number of people survive in small “gombos”.

Babi presents many faces. The New-York-style Abidjan of the Plateau and its office buildings, the Abidjan of the “villages in the city”, the Abidjan of the maquis<sup>6</sup> and open markets, the ostentatious, “loud” Abidjan, the respectable Abidjan of the middle-class villas of Cocody, and the shanty town Abidjan with its boisterous, debauched inhabitants.

## URBAN AMBIANCES

As the decades went by, Abidjan built its reputation as a hospitable and liveable city. “*Abidjan is the gentlest in the world*”, claim the Ivorians. As the “amusement” capital, the city is crawling with open-air maquis where Ivorian cuisine can be sampled and where you can have a drink while reinventing Africa.

In each neighbourhood, makeshift cabarets can be found where people dance to the sound of Ivorian music, coupé-décalé and Zouglou. A nocturnal Abidjan mixing within the same *enjaillement* (West African version of enjoyment), the Riviera setting, the “Go de Yopougon”, the fearless docker from Vridi and the vagabond from Abobo. A Babi en « vivance » (sens?) where everyone can forget their everyday lives and their rank for the time it takes to have a drink: workers and unemployed, rich and poor, Ivorians and foreigners, southerners and northerners, reactionaries and anti-conformists.

After long years of crisis, Abidjan is back. Demolitions, constructions, roadworks every which way, the Ivorian Authorities have worked extra hard to turn Babi into the flagship of French-speaking West Africa of the 21st century, and to make life easier for Abidjan residents. The Ivorian capital has given itself a new face. A hundred or so projects should be implemented between now and 2030: the emblematic tramway lines, 7 new bridges over the lagoon, along with water transport, bypasses, the interurban bus station, Cocody bay.

Restored to its role as the main business centre in the region, Babi is the symbol of a metropolis in the midst of a resurrection, an interface for globalisation. The headquarters of the African Development Bank (ADB), the regional stock exchange for trading equity securities (BRVM), the Marché des Arts et du Spectacle Africains (MASA), Abidjan is the main hub of national consumption, the sub-regional hub even, connecting buyers and sellers supported by an efficient logistics system (diversity of transport modes, market, freight, storage and telecommunications). The city ensures that Ivory Coast is connected not just with the sub-region, but also with all the economic areas. More and more international companies are opening offices there to establish their business in the French-speaking sub-region.

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**"With the appearance of an emerging middle class in Babi, an increasing number of international players from the mass distribution sector seem determined to invest."**

## BABI, INFLUENCER

With the appearance of an emerging middle class in Babi, an increasing number of international players from the mass distribution sector seem determined to invest. With 9% of Ivorian households having an income of over USD 1,000 a month, and 26% between USD 500 and USD 1,000, competition between long-established shopping malls and new arrivals like Abidjan Mall and PlaYce is tough. PlaYce, the result of a joint venture between Cfao Retail and Carrefour, features a superstore, a shopping gallery and a food court with a line-up of restaurants serving “all the cuisines in the world” adapted to the culinary taste of Ivorians.

These malls, which are sprouting in the chic neighbourhoods of Abidjan, are crowded at the weekend and during festive periods. Beyond the emergence of an urban middle class, they are evidence of new consumption habits, new expectations of comfort, quality, new wants that the traditional shopkeeper can no longer satisfy.

Since 2014, Abidjan has once again become the epicentre of francophone music, and that reputation has been corroborated by major events, along with the almost obligatory visits by African, European and American icons to the banks of the Ébrié lagoon. Moreover, certain artists admit that they acquired (or confirmed) their fame starting with Abidjan, among them Cameroonian singers Reniss and Blanche Bailly, and Congolese rumba singers Héritier Watanabé and Fally Ipupa. For the past 5 years, the stars of French rap have put Abidjan on the must-do list for their summer tours.

As part of this momentum, Orange and MOOV CI organise private or public concerts, inviting famous artists such as T-PAIN, maître GIMS, DAVIDO, BOOBA...

Although impacted by international musical styles, Zouglou, and especially Abidjan's coupé-décalé, have conquered the entire West African zone and Africans in the diaspora, with Ivorian-style dance steps that invite *enjaillement*.

Big record labels like Sony and Universal have realized the stakes involved and have set up in Abidjan, because "the city of Abidjan currently offers some important commodities for the development of live and even digital music." (Insa Babylas Ndiaye in Music in Africa).

Institutional events devoted to music have become dates not to be missed in the African music agenda. Some examples: the Marché des Arts et du Spectacle Africain (MASA), the Festival des Musiques Urbaines d'Anoumabo (FEMUA) organised by the legendary zouglou group MAGIC SYSTEM, where for each festival the telecom group MTN sponsors this major musical gathering, ABI Reggae Festival, L'émoi du Jazz, and the Abidjan By Night Festival.

Like music, Ivorian fashion has won its stripes back in recent years. Many fashion shows are organised in Abidjan: Afrikfashion Show, Abidjan Fashion Week, FIMDA (Festival International de la Mode d'Abidjan) or the Awards du Mannequinat Africain. Venues where the great names of Ivorian and African fashion (Senegal, Benin, Mali, Cap Vert, Burkina Faso...) and from the diaspora are on exhibit, launching players in the sector into the highest continental and even international spheres.

Amidst all the effervescent promotion of pan-African fashion, Uniwax marks its presence during the "Beauty Color" show as an official partner, and over a three-day period Abidjan women are spotlighted through fashion, beauty and cosmetics spaces.

## ABIDJAN GIVES BRANDS IDEAS

SOLIBRA, brewing industry leader in Ivory Coast, launched BB CITY (pronounced Babi city), a high quality, light beer, with a more refined taste. The packaging, communications and positioning for this new urban beer play on Babi codes, with the label featuring an image of the Plateau, portrayed New York-style.

**Figure 1:** Advert for SOLIBRA's BB CITY



The company did it again when it launched Society, an app featuring every single maquis and bar in Abidjan that distributes the brand. Society is Babi (Abidjan) in your hand, whether it's on Android or iPhone, it goes beyond the maquis, to cover more select venues like lounges, bars, hotels and even events.

Babi-Shop and Shop2Babi are e-commerce sites that play on this psychological proximity to inhabitants attached to their Abidjan identity.

To launch the Suzuki brand in Ivory Coast, CFAO, a subsidiary of Toyota, named its new showroom “Babi Motors”.

Abidjan is a festival: an increasing number of events are organised there, and these provide opportunities for brands to get in the spotlight. Beyond FEMUA, Abidjan has transformed into a “barbecue festival” every September for the past 10 years. Foods of all kinds, from stuffed crab to the legendary Ivorian *allico*. Held at the Palais de la Culture, over 100,000 people meet there to enjoy gastronomic delights while listening to the latest artists. Each year presents an opportunity for new partnerships with food brands, which often play a big role in the lives of Ivorians: Maggi, Coqivoire, Dinor cooking oils...

The Festival International de Glace has now taken place four times and, each year, it attracts fans of pastry-making and desserts. Over a three-day period, all the players in the ice cream, confectionery and chocolate-making trades come together to please the palates of over 20,000 gourmets.

The FEJA (Festival de l'Electronique et du Jeu vidéo d'Abidjan) is a brand new festival based on the craze among Ivorian youth for electronic games, particularly online games. It will of course feature a video games tournament, with a big prize for the game winner.

ARE WE ONE?





# ATTIEKE, A SUCCESS STORY MADE IN IVORY COAST

## **Ulrich Eby**

Head of Loyalty

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### A CULINARY COMPANION

Every year, Ivory Coast produces over 4.5 million tons of cassava (FAOSTAT<sup>7</sup>), which is still the second biggest food crop after yams and ahead of rice.

Cassava is traditionally a “poor man’s crop”, generating smaller revenues than other food crops in relation to work days invested; however it maintains an important place in the rural world:

- Its harvesting season is complementary to other crops (yams, rice, corn) and thus contributes to food security all year round.
- On certain less fertile lands, cassava may turn out to be the only feasible crop, or at least the least unfavourable choice to ensure income while limiting the risk of crop failure.

However, the past thirty years have witnessed a growing phenomenon: transforming cassava into a “ready-to-eat” product, and attieke is the symbol of that. This phenomenon is revolutionising the industry to the point that an increasing number of producers are taking an interest in cassava growing again.

Originating in the coastal regions, in the space of twenty years attieke has become the national food in Ivory Coast. It is a couscous made from fresh cassava, with a lighter texture than wheat-based couscous; its sour taste results from fermentation over a period of two to three days as part of the transformation process.

Eaten morning, noon and night, attieke is served with fish and meat dishes. It can also be found on the menu at major occasions such as weddings, galas, traditional celebrations. A CIRAD<sup>8</sup> study in 2016 estimated its consumption per Ivorian at around 100 kilograms a year (in equivalent fresh roots).

Sold in a makeshift plastic bag by sellers on every street corner, attieke comes in balls at different prices: an attieke ball at 100 FCFA is equivalent to an adult portion of around 100 grams and an attieke ball at 500 FCFA is equivalent to three or four portions for around 150 grams.

The side dish has managed to make its way into the eating habits of Ivorians, since it has the advantage of being cooked in many ways. When referred to as *“garba”*, it is eaten with fried tuna, vegetables and chilli, as *“attiéké poisson grillé”*, it is served with fried fish and slices of tomato, onion and green pepper.

*“Attieké huile rouge”* is mixed with palm oil, which turns its almond colour orange. *“APF”* is the name given to a very famous dish served at night in the maquis, i.e. attieke with smoked fish.

The dazzling success of attieke, now eaten almost daily by most urban Ivorian households, can be explained by several factors.

1. Its cost, affordable for everyone, it will fill you up for a few hours with a portion costing around 100 FCFA, since attieke has a reputation for being an efficient hunger-buster.
2. It has managed to respond to a social change. Since the working urban housewife has less and less time to cook, the “ready-to-eat” attieke ball is practical to serve with a ready-cooked sauce and quickly grilled fish.
3. It can be bought anywhere on the work-home trip: street vendors present all over Abidjan, supermarkets and markets featuring attieke stands, hawkers running around cars on the major routes through the city.

Finally, attieke has become the national dish because Ivorians like its typical, slightly sour taste, its airy texture, constituting a light yet filling dish. Moreover, cassava’s reputation for being vitamin-rich has given it the aura of a “*healthy*” ingredient. Traditionally, attieke is made by women in the villages around the big Ivorian cities, especially in the south and centre of the country. The cassava root is washed, peeled, grated and mixed with cassava that has been pre-fermented, known as “mangnan”. The paste is pressed to eliminate the starch and then processed manually and dried, before being steam-cooked.

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**“In Ivory Coast, where transforming raw materials has been a struggle, the attieke success story constitutes an example of promotion and development of an industry.”**

## FROM COTTAGE INDUSTRY TO INDUSTRIAL PRODUCT

Given the enthusiasm for the product and the huge increase in consumption, semi-industrial and even industrial production units came into being.

Based on the outskirts of urban centres, the big units operate semi-industrially; the work is divided into different stations or workshops: peeling, washing, grinding, pressing, making the couscous, drying and cooking. They are equipped with more extensive production equipment, such as grinders, presses, concrete drying areas. The biggest ones have a maximum capacity of 100 tons of fresh cassava a day. Attieke is packaged in bags of about 40 kilograms which are transported within 24 hours, and are repackaged in smaller bags for retail sales. It is also in this form that attieke is exported by trucks to countries in the sub-region, or by plane, when sold outside Africa (Europe or the USA).

In Ivory Coast, and more broadly across Africa, where transforming raw materials has been a struggle, the attieke success story constitutes an example of the promotion and development of an industry. According to data from the Agriculture Ministry, national attieke consumption was estimated in 2017 at 2.475 million tons in fresh cassava equivalent, i.e. 1.167 Mt of attieke ( $2.475 \text{ Mt} / 2.12$ ). Exports have been estimated at 235,000 tons in fresh cassava equivalent (including 188,000 tons of pressed paste and 47,000 tons of attieke).

Moreover, 36% of the attieke sold on Ivorian markets is said to go via rural channels, 37% via urban channels in the smaller cities and 28% via the urban channel, mainly intended for Abidjan and its area. In its study on the development of Cassava products in Ivory Coast, CIRAD evaluates total average sales for the attieke value chain at 430 billion FCFA, 127 billion FCFA of that figure for consommations intermédiaires and 300 billion FCFA for added-value.

## AN EXEMPLARY INDUSTRY

Around 500,000 jobs in the country are associated with the Attieke industry. To support it, the government set up a strategy aimed at increasing transformation, investing 1.675 billion FCFA in the effort. The project consists in three parts.

The first relates to the environment and regulations for a cost of 1.04 billion FCFA; it aims to formalise and structure the cassava industry, set up mechanisation systems in plantations and promote a modern, industrial-type operation.

The second part concerns investments estimated at 340 million FCFA. This should help support mechanisation of the different stages in the transformation of cassava, improve quality and productivity, along with the promotion of transport of cassava and derivative products.

The third part focuses on strengthening capacities. By training players in the industry, the State aims to promote good practices, and support research and development on a financial level and in the transfer of technologies.

Recently, attieke has become an export product<sup>9</sup>. It is increasingly consumed by urban-dwellers in the sub-region, looking for diversity. Attieke can be found in supermarkets, markets and in the popular restaurants of Cotonou, Ouaga, Bamako, Lomé and Dakar. Ivorian communities in France and Belgium have also largely contributed to its popularisation. Outside Africa, attieke is sold dehydrated, fresh or frozen. A 100-gram bag can be sold for 2 euros (i.e. 1,200 CFA francs), ten times its price in Abidjan.

To encourage its distribution, particularly on international markets, the Centre Ivoirien de Recherches Technologiques (CIRT) has developed a very simple technique for drying attieke, a cassava-based couscous widely consumed in Ivory Coast. Requiring neither sophisticated materials nor any specific technical skill, this method can easily be used by traditional attieke producers. The fresh cassava meal is put to dry in the sun for two or three days in winnowing baskets or on a mat. Evaporation of the remaining water is achieved by drying the product for about fifteen minutes over heat in a wide frying pan.

Lastly, faced with the growing threat of rival production of attieke abroad, the action plan for the implementation of a geographic indication (GI) label validates recognition and protection of Ivorian Attieke. Note that in French-speaking Africa, only three products originating from Cameroon and Guinee feature a GI label.



Transformation of a locally produced root, industrialisation of production close to cities, development of multi-channel urban distribution to ensure availability and access for all budget levels, export, labelling, scientific and technical research: that is without a doubt the winning recipe for the transformation of raw materials in Africa.





ARE WE ONLY?



## WINNING DIVERSIFICATION, THE CASE OF DINOR

### **Florence de Bigault**

Cluster Manager,  
Francophone Africa

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### AT THE CENTRE OF MEALS FOR THREE GENERATIONS

Every year, West Africa grows by four million new inhabitants. The food issue is therefore a major one and it is mobilising players in the food and agriculture sector.

Palm oil has been one of the culinary traditions of West Africa for generations. In this region, women cook generously with palm oil in making their sauces, fried foods, rice and allocos.

A subsidiary of the SIFCA group, one of the country's food and agriculture giants, SANIA is specialised in transforming raw palm oil into refined palm oil. SANIA markets products such as margarines and table palm oils for which the brand is the leader in the sub-region.

In 2010, SANIA opened its palm oil refinery in Abidjan, the biggest on the continent. The company is very well known to Ivorians thanks to its emblematic brands: Dinor and Palme d'Or table oils, along with the Saint Avé and Delicia margarines. Every single Ivorian grew up with these brands. After all, hasn't Dinor been "at the centre of meals for three generations", as its advertising slogan states.

For 60 years, the Dinor brand has held a near monopoly on the palm oil market. Although the group still generates 50% of its sales in Ivory Coast, it now exports half of its production into neighbouring countries: Burkina Faso, Mali and even Senegal, the land of peanut oil where palm oil sales are growing fast.

## THE REASONS BEHIND A SUCCESS-STORY

The success of SANIA's brands can be explained first of all by the good value for money that its products provide, notably compared to foreign competition, including from other types of oil such as sunflower or peanut.

Next, through its multi-channel distribution policy, which has made its products very accessible: Dinor oils along with Saint Avé and Delicia margarines can be found in all traditional open markets and neighbourhood shops along with the superstores/supermarkets that are blossoming in the big cities.

Lastly, through the diversity of distribution formats: SANIA's products have managed to adapt to the purchasing power of different consumers. For example, Dinor oil is available in 20-litre containers for restaurants and maquis, and in small 25-cl bottles, providing a real back-up solution for housewives managing their spending based on how much money comes in every day.

A source of national pride, SANIA has received many awards, such as the one allocated in 2014 by the Ministry of Industry for its contribution to the Ivorian economy, through its investments and job creation. Its new "red oil" refinery, equipped with a biomass power plant, required an investment of 15 billion CFA francs and almost 400 hirings to process an average of 418,000 tons of raw palm oil a year.

With an annual growth of 4%, palm oil has become a much coveted sector. According to the Africa'nFood report, produced by Ipsos in 2016, the average consumption of an Ivorian household is around 6.2 litres a month.

## DINOR AND OIL, A TACTICAL COUNTERATTACK

In the face of growing competition, SANIA has been shaken up, and especially its main brand, Dinor. Indeed, since its launch in 2014, rival oil brand Aya has occupied a growing place on Ivorian tables with a market share of over 20%. The SARCI group that makes it is a formidable competitor, since it also owns Prosuma, the biggest distributor in Ivory Coast, owning some 20 brands and over 150 stores.

Packaging has been the strategic axis of the Aya offensive. The company first made a name for itself with small packs, in other words 0.5-litre and 0.9-litre bottles. SARCI quickly carved out a market share of over 60%, leaving just 15% to SANIA. At the other format extreme, Aya's star product is its 25-litre container, representing 50% of the brand's sales. The 25-litre has enabled this new brand to get established in the maquis and among street restaurateurs, representing a very large share of palm oil consumption.

SANIA was quick to react with Dora, an entry-level refined oil sold in 20-litre and 25-litre containers, targeting restaurateurs and small-scale vendors.

## DINOR AND RICE, STRATEGIC REVOLUTION

The Asian competition is arriving on African markets: Indonesia and Malaysia now constitute 84% of world production and brands like Bimoli or Delina are taking an increasing interest in African consumers and their strong growth.

Faced with this increased competition on its historic market, SANIA has committed to a strategy of diversification on the rice market.

Rice has become the staple food of the Ivorian population with consumption estimated at 1,300,000 tons of white rice per year, i.e. around 58 kg per year and per inhabitant. With the country only covering around 42% of its needs, most of the rice consumed is therefore imported..

A number of distributors are fighting for this imported rice market, with several brands such as Uncle Sam, Rizière, Papillon, Poisson, Mimo, Basmati, Uncle Ben's, and many others. Varieties of rice run from luxury "Long grain" rice to broken rice (15%, 25%, 35%) via "Long grain broken rice" (less than 15% broken rice).

In West Africa, rice is often cooked with a base of oil and spices. Consequently, the housewife cooking rice always has a bottle of palm oil close at hand: logically, Dinor's diversification from oil to rice made sense, but it was more than that!

In 2018, Ipsos accompanied SANIA in its diversification on the rice market, through a series of studies among Ivorian consumers.

Taking the example of the popular African dish greasy rice, SANIA wagered on being present for both ingredients, rice and the palm oil that gives it its strong taste and characteristic colour.

To make this happen, the main questions raised by this launch project for a rice brand were of three types:

1. How to position this new brand of rice on the existing Ivorian market (luxury long grain rice, long grain broken rice, broken rice...)?
2. What brand strategy should be determined around Dinor, the reigning brand of table palm oil, to extend it to the rice market?
3. How to capitalise on the Dinor brand, what values to use in communicating about this product launch, making an impact and enabling consumers to easily associate this new Dinor rice territory?

Dinor rice was launched on April 2018. Positioned on the 100% long grain rice segment, it is a quality rice, developed from 3 varieties to respond to the different demands of Ivorian consumers: strong-flavoured Thai Jasmine rice, Vietnamese Premium rice, Vietnamese Jasmine rice, mostly sold in 5-kg bags.

Communications played on the very strong emotional bond between Dinor clients and the brand, through spotlighting this new rice, which is both fragrant and high quality. With its tagline “Une nouvelle histoire de goût<sup>10</sup>” (A new taste story), the brand is rooting this launch in the very strong taste relationship it has woven over the past sixty years with Ivorians.

The initial months have been a success; consumers have responded favourably to the choice of a quality rice, with a good price positioning and recognised keeping qualities, even when cooked. This example of a winning diversification strategy is a remarkable source of inspiration for local brands that are often locked into a mono-sector system.

ARE WE ONE?



## GROWTH, THREATENED BY CLIMATE

### **Florence de Bigault**

Cluster Manager,  
Francophone Africa

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### THERE ARE NO MORE SEASONS

That's how the Ivorian man in the street sums up his mix of surprise and concern at the change in the rain patterns. Every year, Ivorian farmers look at the sky. It isn't the stars they're interested in, but the clouds, signs that predict rain. According to the National Climate Change Programme<sup>11</sup>, the rainy season is now 10 to 30 days shorter, depending on the region, due to climate change.

Ivory Coast is in fact increasingly exposed to climate change: flooding, storms, landslides, drought, heatwaves. Brush fires, soil damage, the drop in river flow and coastal erosion could all have serious socio-economic impacts in the years to come. The cause: deforestation. Ivory Coast has in fact lost over 80% of its forest surface in half a century. From 16.5 million hectares in 1960, forest cover gradually dropped to around 12 million hectares in 1970, then 4 million in 2000. The rate of deforestation has been one of the fastest in the world.

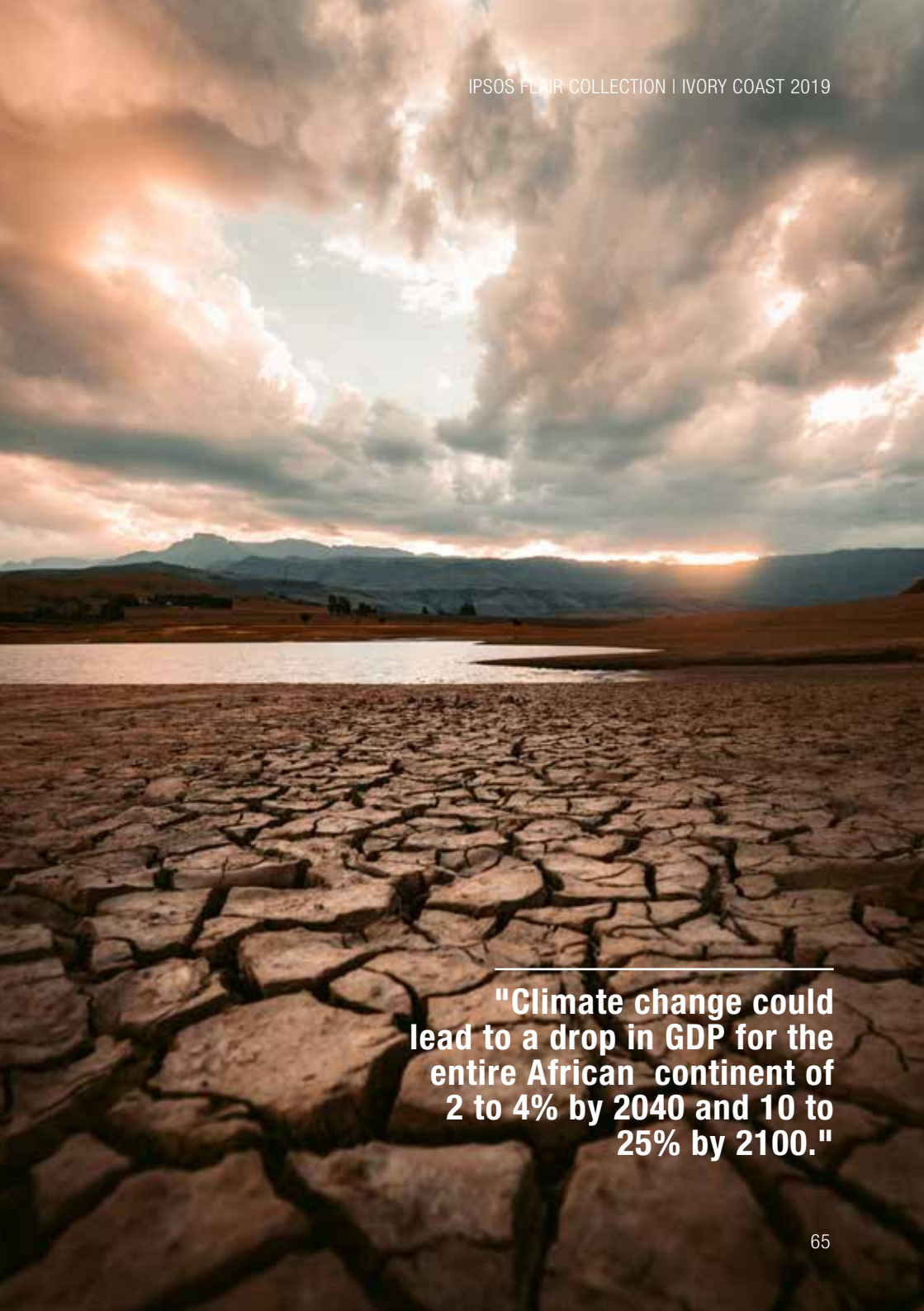
Deforestation is largely due to the growth of commercial farming such as cocoa, rubber, palm oil. Moreover, according to SODEFOR (Société de Développement des Forêts), almost 300,000 hectares of forest disappear annually due to the illegal over-exploitation of wood used for the production of charcoal for cooking and for the export of precious timbers (Teak, Afrormosia and Bete).

In 2016, drought conditions led Ivory Coast to lower its forecast cotton production (410,000 tons instead of 500,000). The same causes producing the same effects, there has also been a considerable drop in cashew production. Food harvests in the Centre and Centre-West of the country have also been delayed and the capricious rain forecasts have pushed the production period back in several zones. The country's growers and breeders are experiencing increased poverty due to the variability of the climate.

The change in rain patterns and drying out of arable land now present a direct threat to major crops in Ivory Coast. Rainfed agriculture, with no irrigation, covers 90% of production in the cocoa sector, a sector that represents one third of the country's exports and provides income for over 5 million people. The industry could be negatively impacted by the rise in temperatures, which is expected to reduce the fertility of soil in the farming regions of the South-East.

According to the World Bank published in July 2018<sup>12</sup>, 30 years from now, a part of southern Ivory Coast, the traditional cocoa production zone, will become unsuitable for that crop due to the effect of *"the increase in temperature which could make the soil more arid and less fertile."*





**"Climate change could lead to a drop in GDP for the entire African continent of 2 to 4% by 2040 and 10 to 25% by 2100."**

## TO COUNTER THE RISKS TO COME, ACT IN FAVOUR OF THE ENVIRONMENT

Based on the estimates of the Intergovernmental Panel on Climate Change (IPCC), to the effect that climate change could lead to a drop in GDP for the entire African continent of 2 to 4% by 2040 and 10 to 25% by 2100, the World Bank estimates a loss for Ivory Coast of 380 to 770 billion CFA francs in 2040.

The report pays particular attention to coastal erosion and to the cocoa sector. *“With 566 km of coastline, Ivory Coast currently has a coastal population of almost 7.5 million inhabitants, who produce almost 80% of national GDP.”* The World Bank is worried about the risk of a 50% drop in fishing due to bioclimatic change affecting the Atlantic Ocean.

The loss of beaches and dunes that provide natural protection is worsening the consequences of marine flooding. That presents a threat to the country's economy, particularly in relation to high-profile industrial facilities and infrastructures, such as the Société Ivoirienne de Raffinage (SIR), Abidjan International Airport, the Ports of Abidjan and San Pedro, coastal roads, industrial plantations, and in relation to major hotel complexes in Abidjan, Grand-Bassam, Assinie and San-Pedro. In the Port-Bouët zone (with a population of 0.4 million inhabitants), the cost of erosion and of marine flooding for 2015 alone is estimated at 1.4 billion CFA francs (Bretton Woods Institution). The stakes are huge and the alarm has been raised by the Ivorian government.

During the recent international climate summit, “Planet Summit”, the Ivorian Minister of Higher Education and Scientific Research, Ramata Ly-Bakayoko, announced Ivory Coast's commitment to a 28% reduction in its greenhouse gas emissions compared to 2012, by 2030. A programme to fight climate change, the signing of several agreements on soil damage or dumping mercury waste

into the environment, along with a national development plan for 2016-2020 now systematically include environmental concerns in their implementation.

Government authorities recently launched an ambitious strategy, destined to protect the forests, its first goal being to raise 616 billion FCFA (approx. 939.1 billion euros) over a ten-year period with a view to funding the new national plan for forest protection, rehabilitation and extension.

## AWARENESS AND RESPONSIBILITY, THE OTHER CHALLENGE

The fragility of the environment in Ivory Coast has invited itself to the table with the business world. To sensitise the Ivorian private sector about energy efficiency measures and resulting opportunities, in late 2017, the Confédération Générale des Entreprises en Ivory Coast (CGECI) launched a partnership with the Compagnie Ivoirienne d'Electricité (CIE).

The Cemoi group, a company in the cocoa industry, in partnership with the Ivorian Cocoa regulating body, the Conseil du Café-Cacao, decided to invest 7.5 billion FCFA over a five-year period in the promotion and protection of biodiversity in cocoa production. The initiative, named the “cocoa transparency programme”, aims to incite producers to follow programmes that fight deforestation.

The African advertising Grand Jury dedicated its 2018 edition to sustainable development awareness campaigns under the theme: “*Sustainable development, need for a healthy environment*”, aiming to reward advertisers that stand out in the field of advertising and sustainable development. The SIFCA group, the country's ag industry champion, was the prizewinner for 2018. In the field, in

its industrial cocoa, sugar cane and oil palm tree plantations in Ivory Coast, SIFCA counts 4,000 hectares of sites protecting fauna and flora. The group is working in partnership with, notably, the Société de Développement des Forêts (SODEFOR) and the Office Ivoirien des Parcs et Réserves. In addition to reforesting these areas, the group is wagering on sensitising plantation owners.

When it comes to the general public, citizen-driven initiatives are still few and far between, through a lack of raising awareness among Ivorians. As one of those initiatives, the internationally known music group Magic System has committed to raising awareness on environmental problems, working with young project promoters selected to run an awareness campaign on climate change issues in Abidjan. The initiative has been organised by the Fondation Magic System in partnership with the Institut de la Francophonie pour le Développement Durable (IFDD) and the Ministère des Relations internationales et de la Francophonie du Québec.

With the consequences of climate change becoming increasingly visible in their everyday lives, Ivorians are, despite everything, starting to be alarmed. The recent floods in Abidjan between June and August 2018 didn't only impact the flimsy shelters in the ghetto. Posh residential neighbourhoods on the hills like Cocody and Riviera, spared until then during the rainy season, suffered serious flooding. The official report lists 19 deaths, ransacked houses, damaged vehicles, sometimes even carried away by the water, a water level of over 2 metres above sea level, collapsed pontoons, destroyed roadways, damage to electrical installations. For the Ivorian in the street, no one is sheltered from flooding these days, including the most affluent residents.

Nevertheless, far from being explained by logical causes (deforestation, global temperature rise...), these phenomena have been attributed to mystical and religious causes. Evangelists, often supporters of Laurent Gbagbo's old regime, interpret these disasters as divine punishment striking the new regime, accused

of favouring Muslims and northerners. In contrast, those same northerners, who favour President Ouattara, allude to punishments sanctioning the increasingly bad behaviour of Ivorians: not respecting nature, widespread unwholesome behaviour, decadent morals or other deviations.

Ivorians are even more concerned for the fact that they still lack information on the rational causes and consequences of climate change. That's why the publication of the World Bank study (*Côte d'Ivoire and Climate Change*), which was broadly covered in the national media, came as a bombshell. In particular, it revealed to Ivorians the dramatic situation caused by the country's deforestation and the negative consequences of intensive forestry.

The irony of fate, at the very moment when decision-makers were agreeing on the urgent need for rapid economic development, involving a multiplication of economic sectors, the question of the environmental impact of emergence abruptly invited itself into the debate.

How does one reconcile development and environment? To protect the environment, and beyond humans alone, will growth need to be limited? Or on the contrary, should the environment be sacrificed? This debate is spreading in Africa: Rwanda and Botswana were the initiators of a movement seeking a third way, integrating reasoned economic growth and environmental protection into their development planning.



ARE WE ONE?



# THE KEYS TO SUCCESS

ARE WE ONE?





## UNDERSTANDING THE MIDDLE CLASSES

### **Florence de Bigault**

Cluster Manager,  
Francophone Africa

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Mention of the awakening of the middle classes takes on particular meaning in Ivory Coast. Indeed, during its “Twenty Glorious years”, the State had agreed on the emergence of a solid middle class, capable of constituting the framework for an educated, hard-working population enamoured of the modern world: the aim was to show that an independent Africa could quickly get in stride with the western world.

During the years of the Ivorian miracle, a middle class did form in Abidjan, Bouaké and in the inland cities, mainly in the cocoa zone, such as San Pédro and Daloa. Its cornerstones were civil service executives with advantageous salaries, a few specialised employees from the private sector, particularly industrial SMEs or the energy sector, the professions, particularly health and legal. In the heartland, thanks to the famous Caisse de Stabilisation, a category of wealthy farmers, mainly in the cocoa industry, helped expand this blossoming middle class. The agrarian petite bourgeoisie already nascent in the late colonial period was now joined by a new State petite bourgeoisie.

Evaluated at almost 25% of the Ivorian population at the time, it was often referred to by the familiar expression: the “*en-haut des en-bas*” and the “*en-bas des en-haut*”. (*je ne sais pas je devrais tenter une traduction ou est-ce intraduisible? Je ne suis pas certaine de bien comprendre...*)

The Ivorian middle class was fully in the sights of President Boigny as a model for the middle classes who were booming in all the western countries, based on the paradigm of the nuclear family living in newly built towns, with access to comfort (bathroom, abundant water and electricity, bedrooms for children and parents), materially affluent (car, TV, education and health care) and the leisure society.

At the time, the Ivorian middle class spoke a refined French, went to the cinema as a family, sent their children to university, often in Europe. They owned their own house. The men dressed in the very latest Paris fashions and the women dreamed of going there on holiday.

The accumulation of wealth was filtered through state regulations, which helped finance an ambitious social policy. The Yopougon district in the north of Abidjan represented the quintessential place where the Ivorian middle class flourished; the SOGEFIA and SICOGL, parapublic companies, enabled them to purchase 3- or 4-bedroomed homes in new real estate programmes, based on the rent-to-own principle. Communal equipment and infrastructures (schools, dispensaries, neighbourhood electricity network...) provided these inhabitants with access to a form of prosperity that was brand new in West Africa. This urban middle class, boosted by public investments, was then very broadly composed of teachers and executives from an abundant Ivorian Administration.

In the 1980s, the "Ivorian miracle" came to an abrupt halt and the economic crisis divided per capita income in half; the job market deteriorated heavily, cut off from State support: reduction in the number of government workers, thinning out of plantation owners, destruction of qualified salaried jobs and a boom in informal employment. Between 1978 and 1983, the purchasing power of civil servants dropped by 39%.

## THIRTY YEARS LATER, WHAT HAS BECOME OF THE IVORIAN MIDDLE CLASS?

Ideally, the “middle of the pyramid”, a notion echoing the “bottom of the pyramid” notion, represents a new manna for consumers with enough income to buy more than the absolute necessities and pull the country towards emergence. However, under pressure from a series of economic and social crises in the past decade, “the class in the middle” has been radically transformed.

Studies conducted by Ipsos in 2015 and 2016 show that it is more urban and more fragmented. It is now less of a middle class, whether in terms of its income, which dropped sharply, or its behaviour. It is now strongly connected, fairly well educated, a fan of the social networks and a consumer of imported products. It likes to do monthly shopping at the supermarket while continuing to visit markets and neighbourhood shops.

Halfway between mass poverty and the opulence of the elites, the Ivorian middle classes have now learned to manage alone, in a country where the state provides less and less protection.

In 2018, belonging to the middle class in Ivory Coast means looking after yourself financially, making your three meals a day, living in a modest but decent interior, having plans for the future, working hard to achieve them and often having to accumulate several income sources in order to manage.

It also means being subject to permanent tension between meeting the needs of the nuclear family and continuing to support the extended family, managing conflicts between social traditions and aspiration to modern life.

“IF YOU HAVE NOTHING, YOU ARE NOTHING”

Money is central to the relationship the middle classes have with their environment; having money means extracting oneself from the mass, being important, existing in the eyes of others.

But money, upward mobility, attract as much respect as envy. It can even cause unhappiness if it doesn't come with generosity and redistribution. The Ivorian middle classes are the pillars of solidarity within the extended family: sending money makes you monetarily poorer but socially richer every time.

Since 2011, the economy's strong recovery has enabled a boost in growth, an increase in employment and purchasing power for qualified households ou bien orientés dans les activités informelles – sens??. Over this period, GDP per inhabitant has increased by 6% a year.

The minimum salary has almost doubled, jobs in the public sector have increased and plantation owners' incomes are on the rise. Can we now say that Côte Ivoire has re-established a solid economy enabling a relatively diverse group to follow the paths of upward mobility?

Concretely, the Ivorian middle classes constitute a disparate mass of around 26% of the population, integrating very diverse realities.

Two-thirds of this middle class constitute the lowest stratum of households, oscillating between minor prosperity and vulnerability. Made up of low-level civil servants, a heavy proportion of urban independent workers in the informal sector (39%) and farmers, their incomes are unstable in over 60% of cases, oscillating between 380 and 650 euros per month and per household.

66% claim to save money every month. Often renters, living in popular neighbourhoods, hit by delestage??? downsizing??? and insecurity, this part of the Ivorian middle class nevertheless enjoy a level of comfort that escapes the large majority, with toilets and kitchens in most households, separate bedrooms for parents and children. Only 42% have a refrigerator and fewer than 20% a microwave; while 47% are equipped with a smartphone, 16% have a car, public transport is still the most widely used means of getting around; approximately 21% received a higher education, but two-thirds pay for their children to attend private school.

In contrast, one third of this middle class represents the upper and stabilised stratum of these “Ivorians in the middle”. It tends to be made up of the heirs of the intermediate groups of the 1960s-70s, but its profile has changed: fewer civil servants and more executives from the private sector, well trained and easily able to fund courses increasingly sought after by the Ivorian economy: engineers, accountants, IT specialists, sales reps... The average income of these households is between €900 and €1,760 a month; 44% have a college degree and over 81% send their children to private school.

Living in residential neighbourhoods, almost sheltered from délestages and water shortages, this stratum of the middle class enjoys a much higher level of comfort. They live in homes with 5 rooms and more, 32% own a microwave and 61% a freezer, they are well equipped with high-tech products: 76% have a smartphone, 61% a parabolic antenna and 66% a computer.

This part of the middle class is concentrated around a nuclear family of two parents-two/three children, although it continues to provide for the needs of the extended family. The scarcity of real-estate programmes that characterises the big Ivorian cities prevents them from accessing property ownership, despite their capacity to save and repay loans; only 39% own their own home and 22% have a car.

Greater attention and time is devoted to leisure activities, particularly at the weekend and during annual holidays (outings to the beach, bars, sports activities). In terms of consumption, frequentation of big supermarkets and malls is relatively more regular.

This middle class with higher, more stable incomes is said to represent around 8.6% of the population of Ivory Coast, mainly concentrated in the big cities, including Abidjan. An analysis of the middle classes in Ivory Coast shows that this category is both limited in number (26% of the population), extremely heterogeneous in their composition, diverse in their aspirations and fragile. Among the historical categories, it covers those who have managed to escape poverty and build themselves a little heritage, notably in terms of real estate: civil servants, cocoa, coffee or rubber plantation owners, representatives from the professions. They have now been joined by new profiles: entrepreneurs in the informal sector, executives with degrees from the private sector, including a number of inpatriates.

The differences are so great that it makes more sense to talk about middle classes in the plural, in terms of income, wealth accumulated, purchasing power when you deduct the varying share of redistribution to the extended family required by their middle-class status when they originally came from a working class background. Nevertheless, these Ivorian middle classes share the same values: the virtues of work and savings, the importance of religious faith, a taste for effort and self-promotion; the same importance accorded to the education of children and a thirst to find out more about the world and current affairs. Neither “rich nor poor”, these middle classes define themselves as a virtuous class in a system often viewed as “faithless and lawless”.

## THE MIDDLE CLASSES ARE BACK

Fleeced by 20 years of economic and social crisis, the Ivorian middle classes are back. Although their purchasing power remains below that of the middle classes in other emerging continents, they nevertheless support general consumption and are a target for international brands and national champions alike.

Will the upper stratum, representing around 8.5% of Ivorians, largely concentrated in Abidjan, be enough to boost mass consumption of goods and services, keep shopping malls, schools and private clinics profitable, along with the leisure and cultural products currently at the planning stage?

Whatever the case, their capacity to save and their investment in their children's education are precious fuel for continuing on the road to emergence. Their critical sense, their high level of education and information compared to the population at large, will obviously present a challenge for the government. They are already demanding more security in the neighbourhoods, more infrastructures. They are also very sensitive to better quality education and health systems, both of which have deteriorated significantly over recent decades.

As can be seen, the Ivorian middle classes aspire to more order and rules, justice and social progress, however, faced with upcoming political deadlines, will they be able to form the basis of democracy or will they be tempted by authoritarian narratives?

The future? The Ivorian middle classes view it positively, with 66% considering that their standard of living has improved over the past five years and 82% that their standard of living will be higher than it is today in the next five years.

ARE WE ONE?





## THE WORDS TO SAY IT

### **Marguerite Ebah**

Qual Project Manager

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In many countries, advertising has long strived to adopt a certain level of language, avoiding any impression of triviality, elegant and classic in its expression. This is a way of fitting into a certain history and heritage. For some years now, new phenomena have been observed, featuring puns that are pitiful yet humorous in their deliberate mediocrity, designed to amuse and create a sense of closeness to consumers.

Ivory Coast has invented a third way. After expressing themselves in the official French, brands have adopted the country's vivid way of reinterpreting the language inherited from the colonists, a sort of nod to culture and proof of their closeness to the public. The development of local advertising creation has accelerated that trend, enabling it to gain in creativity too.

## POPULAR IVORIAN FRENCH, AN IDENTITY LANGUAGE

French as spoken in Ivory Coast today is the result of a long process that began in the very first hours of colonisation and has continued into the present day. Through seeking to make themselves understood rather than teach their language to the locals, white colonists dispensed a rudimentary language, reduced to the key words, simple to memorize without wasting any time. As they saw it, the natives weren't predisposed to learn French: they just needed to instil the few words they would need to carry out the tasks they had been assigned.

Ivory Coast became independent on August 7th 1960 and the young state's brand new constitution proclaimed in its first article *"the official language is French"*. Speaking to the United Nations, the President of the National Assembly at the time, Philippe Yacé, justified the choice of French as official language as follows: *"I must however state that as concerns my country, the adoption of French by the first article in our Constitution was doubtless one of the factors of unity that enabled happy and rapid completion of the project of national construction, which His Excellence President Félix Houphouët-Boigny had made one of the first themes of his action. French, which is freely accepted by us, was a factor of cohesion within Ivory Coast, where it has favoured the coming together of our hundred or so ethnic groups."*

Two French languages were born of this political decision:

- Official Ivorian French, written French, the language of the elites and more broadly of the educated
- Popular Ivorian French, the French of the masses, which quickly became the everyday language

Thus, the Ivorian in the street inherited a language that the French had tried their very best not to teach him in its entirety; he decided, assertively, to adopt it in a different way, using permanent inventiveness. From a colonial language, French thus gradually became an Ivorian language.

Initially referred to as “*market French*”, popular Ivorian French was born in Abidjan and started to extend to the whole country from the 1970s. Neither creole, nor pidgin, Ivorian French is a means of recognition and identification that Ivorians use to communicate on a day-to-day level and which, depending on experiences and individuals, becomes richer in content. It transcends ethnic divides, sociological and hierarchical barriers to interconnect the people who use it.

The non-Ivorian francophone hearing Ivorians for the first time is surprised at the phonetics: an approximate pronunciation of certain French sounds can be noted, the elimination of its “r”, and determiners are usually omitted.

In the street, the following types of phrase can blithely be heard and have to be decoded:

*Envoie boisson-là / manger-là ici* = Come and eat with me!

*Il est quelième* = What is his rank?

*On n'a qu'a faire quoi ?* = What do we need to do?

But it is definitely in its expressions that popular Ivorian French proves most inventive:

<i>Avoir un son</i>	=	Have a scoop or joke to share
<i>Ça mange pour toi !</i>	=	Things are going great for you!
<i>Façon il connaît</i>	=	Know how to do things, know about something, be skilled in a very specific area
<i>En même temps est mieux</i>	=	Not worth putting things off until tomorrow, might as well act now
<i>J'emprunte le 11</i>	=	I'm going on foot (referring to the imaginary bus line number formed by two legs)
<i>On s'attrape</i>	=	Let's call each other – have dinner
<i>Ça ment pas</i>	=	We're 100% sure of succeeding
<i>On est ensemble</i>	=	We stand together, help each other
<i>Faut pas me mettre sur petit vélo</i>	=	You better not stand me up
<i>Faut faire chap chap</i>	=	Hurry up

While a few expressions have been borrowed from official French, they don't have the same meaning at all: *"Tu es dangereux"* (in traditional French "You're dangerous") means being the best, unmatched. Likewise, *"Laisse papa se reposer"* (Let Daddy rest) conveys the notion that it's better not to push things and to just give up; the cellular phone has become *"le circulaire"*, because – unlike a fixed line – you can "circuler" (travel around) everywhere with it.

A *"Finlandaise"* is definitely not a female inhabitant of Finland, but rather a girl who is always hungry, just as an *"Académicienne"* doesn't attend an Académie, but refers to a minor.

Even more imaginative, *"France au-revoir"* (France goodbye) refers to second-hand vehicles imported from France, and *"Etre dans le beurre"* (Being in the butter) means being ecstatic, being financially or socially well-off.

Certain expressions, for which it is important to grasp the nuances, have a stronger meaning than in "Franco-French". For example, written in big letters on the walls of the head office of the Brassivoire company in Abidjan (CFAO/Heineken), *"On est ensemble"* says a great deal about the in-house social atmosphere and relations with suppliers: I support you, I understand you, no problem, it'll be fine, we're like brothers.

Confining themselves to official French alone would have been a dangerous strategy for brands, who would thus appear to be on their own pedestal and far-removed from consumers: so they began using this popular, inventive, poetic "market language" that spontaneously creates empathy.

By using the expression *"ça ment pas"* for the launch of its new bouillon cubes,

This **COCA COLA** billboard campaign combines Ivorian French and English.

**Figure 2:** Advert for COCA COLA



**MTN** uses the word “attacher” meaning “make a phone call” in an ad vaunting the merits of free bonus minutes. The same operator recently launched its caller ID campaign with the expression “je suis dans le pain”, which means “I’ll have a problem if I don’t make my identity known.”

**Figure 3:** Advert for MTN



**GB Goods** uses consumer testimony: hands-on product experience meets expectations and creates an indescribable but expressive pleasure.

**Figure 4:** Advert for GB GOODS



To relaunch its Flag beer by repositioning it as the reference beer faced with the rise of the competition, the brewing company Castel used a disdainful expression "Faut laisser affairage aux gaous", meaning "Leave the gossip to the sourpusses".

**Figure 5:** Advert for FLAG BEER



ARE WE ONE?



## LOOK AT THE NEW GENERATION, “PRESSÉE-PRESSÉE”

**Marguerite Owehi**

Head of Qual

### IVORIAN FRENCH, A HIP LANGUAGE?

Lately, French, Ivory Coast-style, has been inviting itself into the French spoken in France. Through the export of the Ivorian *coupé-décalé* into the playlists of French teenagers, due to connections between Ivorians who stayed in the country and expatriate Ivorians, certain expressions have invaded the language of young suburbanites and the trendy media.

A “Go” is a girlfriend and, more broadly, an attractive girl, a “gaou” is someone a little stupid and naïve (*juste au-dessus on dit que ce sont des “aigris”*). “C’est pas affaire” means an unresolvable problem, “y dra” means that we are dealing with a delicate situation, and “ca fait deux jours” indicates that it’s been a long time since people have seen each other.

And to crown it all, the famous “Ambiancer” recently entered into Le Petit Larousse with the definition: *“In Africa, creating an ambiance, activity; behaving cheerfully”*.

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**"More and more, Ivorian youth seem to be escaping the codes governing parent-child relations in African societies."**

ENJOY NOW

*"I no longer recognize our young people".* How many times have we heard that lament from adults? More and more, Ivorian youth seem to be escaping the codes governing parent-child relations in African societies. A young African must necessarily respect his elders, obey them and not escape the never-changing rules: that's what has ensured the handing down of traditions from one generation to the next. In the society where he grew up, the young Ivorian must arm himself with patience to make a place for himself, at the risk of waiting for his turn to be old.

Ivoirians claim that this revolution, with the eruption of a turbulent, rebellious youth living "day to day", dates from the 2000s. Of course, it's easy to link that to the socio-political crisis the country was undergoing. Traditional values and references have been damaged, with children often witnesses to the doubts and transformations their parents have been subject to.

*"With young people these days, it's chap chap",* chap chap being a popular Ivorian French term meaning that they are incapable of being patient and staying in their place. Abidjan residents have found a name for them: Generation "pressée-pressée" (rush-rush), the Ivorian version of "Gen Z".

Originally, this new generation found their means of expression in a musical trend, *"coupé-décalé"*.

A wild Ivorian version of the Congolese rumba, the coupé-décalé quickly became a lifestyle: night over day, pleasure over effort, ostentation over modesty. And the star artists of coupé-décalé set the example: licentious lyrics, odes to money, partying and excess. After all, can't the kings of coupé-décalé be seen

in the night clubs of Abidjan popping champagne corks and handing out money to their audience, calling this practice "*le travaillement*" (a combination of work and entertainment)? By making coupé-décalé their flag, some Ivorian youth are expressing their desire for extreme sensations, for egocentrism and flashiness.

Once night falls, in the maquis and clubs, these carefree young people can be found rocking out in celebration of their DJs, the "*voice of the voiceless*". The principle is simple and always festive: first, the label, in other words wearing brand-name clothing and/or the most fashionable clothing; second, being loud, in other words making noise to draw attention to yourself.

There are still many forerunners of this movement, although several of them have left their stamp on it, such as A and many others...

Red Bull Music Academy even iconized those artists who reached the pinnacle of Ivorian glory by creating special coupé-décalé collectors' cards: DOUK SAGA, DJ ARAFAT, MOLARE, DJ JACOB, CLAIRE BAH, DJ LEO, DJ LEWIS, KEDJEVAR. The cards were produced by Bahhar (a columnist for Mouv and producer for Trace Africa) and Tristan Perreton (a Lyon-based illustrator who operates under the name Der Kommissar).

The *préssée préssée* youth also have their clothing style: swagg. This is all about matching the right clothes in the right way. Both boys and girls, "swaggers" wear their clothing very tight leaving certain body parts exposed. They are fans of total look jeans or fluorescent colours or patterns from the 1980s. They wear lots of jewellery, usually very chunky. They cleverly mix fabrics and prints, integrating a few luxury-brand articles or accessories in their clothing arsenal That's the swag touch.

Swagg and coupé décalé: the young Ivorian wants to be seen, heard and no longer knows how to wait. He wants to bite into life immediately and to show it: brand-name clothing, counterfeit even, flashy jewellery, heavy consumption of luxury alcohol and customised cars. He consumes without counting, rarely worries about the future, which can lead some young people into illicit activities.

Frightened, adults are quick to make random comparisons between the *pressée*-*pressée* generation and the rapid escalation in drug use, "broutage" (familiar term referring to all sorts of criminal behaviour, notably online<sup>13</sup>) and prostitution in Ivory Coast.

## DESIRE AND FRUSTRATION

To listen to parents, teachers, ministers, this new generation, aged between 13 and 20, have become individualistic, consumerist, disrespectful. Adults fear that their children are subject to unrealistic desires that feed into chronic dissatisfaction.

As digital natives, young *pressé*-*pressés* spend a lot of their time on the Internet and social networks: Facebook, Snapchat, Twitter and Instagram are now more commonly engaged in than the traditional family debates. They surf several screens and are accustomed to "everything, immediately and everywhere". They think it is normal to pay more for the very latest smartphone, but also to be able to access a film or song with just one click.

Generation *pressée*-*pressée* sign up for special discount call plans, especially for evenings and even the middle of the night. Orange seized the opportunity with its offer of unlimited calls between 10 pm and 7 am and its famous slogan:

“quoi? t’as pas d’appels illimités de 22H à 7H? Trop la honte!” (What you don’t have unlimited calls between 10 pm and 7 am? So embarrassing!). Its competitor, MTN, took it a step further with a 300-call-minutes plan directly targeting young people via a campaign having as its slogan: *“la tête que je fais quand je reçois 300 minutes pour pointer!”* (The face I make when I get 300 minutes for flirting!).

This generation invented text spelling: they don’t have time to spellcheck. “xlt g vè tt xpliqué” (hi, I’ll explain everything), “g s8 calé OKLM” (“je suis calé au calme”, meaning I’m fine and available).

Generation *pressée-pressée* are of course a favoured target for advertisers. Beer brands, whisky brands and – increasingly – wine. Taking a bottle of wine to a night club is the new way of *“mousser fort”*<sup>14</sup> (having a blast). Energy drinks have made this generation their ambassador. XXL states on 4x3 posters: *“On est petit mais puissant”* (we’re small but powerful). Heineken launched its Ivoire beer with the message: *“Ici on ne danse pas, on décale”* (We don’t dance here, we décale), referring to the Ivorian dance trend.

The social networks have become the means of communication of a growing number of brands targeting this generation. The editorial strategy of Vibe Radio, the music radio station of the Lagardère band, and the online magazine Ayana Webzine hosted by Amie Kouame from A (the African channel of the Canal+ group), are perfect examples of this.

Facebook and Twitter are also the empire of Abidjan show-biz: for shows, dance parties, theme balls and showcase events, the managers of entertainment venues have their profiles. *“Facebook is the best way to reach night-clubbers”*<sup>15</sup>

START OFF FAST,  
THEN ACCELERATE

As can be seen, generation *pressée-pressée* take short cuts and overtake in the emergency lane. They want to live right now and make their place in the sun, even if it means growing up too fast....

*"We love people looking at us".*

*"I need to live fast and experience everything, so if I die right now, I've already seen it all".*

Besides *coupe-décalé* artists, the icons of this new generation are soccer players who grew up in Europe, or startupper, people who made money fast and have succeeded despite their young age.

These days, generation *pressée-pressée* are the focal point of criticism from their elders: narcissistic, disrespectful of values and traditions, amoral, reluctant to make an effort. And yet, surely they are a reflection of this new Cote d'Ivoire, of a society seeking new experiences, freedom, independence, and which wants to live more in the moment?

Generation *pressée-pressée* don't want to grieve over their own futures. On the contrary, their energy and impatience are drivers of creativity and entrepreneurship.

More than their elders, these young people are trying to take charge of their own lives; they are creating businesses in sectors that they are often familiar

with as consumers: fashion and accessories, beauty, cosmetics and perfumes, music, the web and social networks, the world of show-biz and entertainment, the restaurant trade.

Not so superficial as one might think, perhaps they have found a secret, turning their passions into opportunities to get away from insecurity and be masters of their own ship.

ARE WE ONE?





## THE PHONE THAT DOES EVERYTHING

### **Marguerite Owehi**

Head of Qual

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The arrival of the mobile phone constituted a veritable revolution in Ivory Coast and throughout Sub-Saharan Africa, opening the way to multiple and totally novel uses.

After first appearing in the business world, the mobile went on to conquer young, low-income and finally rural populations. In less than ten years, the mobile has partly made up for the lack of infrastructures, information sources and points of sale. The mobile has become a medium, a terminal, a communications tool, serving as a means of information, exchange, payment and money transfers, training and leisure activities.

The last category to be impacted by the mobile was urban consumers on low incomes. Operators have adapted their offers to appeal to these potential clients; surveys provided a precise knowledge of the amount they were willing to spend per month to be able to own and use a mobile phone: between 5 and 8 dollars a month in Ivory Coast compared to 3 dollars in Ethiopia, for example.

By late 2017, the number of mobile phone subscribers in Côte d'Ivoire had gone beyond the threshold of 30 million clients. The number of Internet subscribers, for its part, had exceeded 17 million, thus confirming the boom in the NICT market in the country.

As concerns Internet accessibility, in other words the country's coverage rate, the Alliance for Affordable Internet report ranks Côte d'Ivoire in fifth position for Africa, and eighteenth on a global level, with a penetration rate of 72% as opposed to 30% for the continent as a whole.

### A CONTINUALLY EXPANDING MARKET

The continent's great revolution is clearly the mobile Internet revolution. Among the 22% of Ivorians who use the Internet, "smartphoners" represent more than 90%.

The smartphone quickly spread into affluent urban environments then, thanks to aggressive ad and sales campaigns by operators, among young people (15-25 years). This target is particularly pampered: they represent almost half of subscribers and the clientele most inclined to devote a growing share of their budget to accessing the latest features and technologies on the market. Operators keep coming up with offers targeting young people (Club's cool, Funzone or Moov'In) to appeal to and win the loyalty of this clientele eager for new services carried by the development of 3G and 4G.

Entertainment is a strong development area for these new mobile Internet services. With the Deezer Premium offer, Orange clients can access the streaming music platform. Gameloft allows games to be downloaded onto a mobile. Orange football club is a favourite of soccer fans. MTN launched PLAY, a platform for downloading recent mobile content, texts, videos, ringtones, wallpapers, games, and even... prayers!

If Ivory Coast is above the average for the continent in terms of Internet penetration, it is thanks to the introduction of 3G mobile services from 2012 and the continued democratisation of the smartphone. According to the e-commerce

platform Jumia, smartphone sales have smashed records for mobile phone sales, with 94% of sales going to smartphones, compared to 6% for feature phones in 2017. An annual increase of 35%.

This democratisation of smartphone access is the result of:

- Insufficient coverage of the national territory by fixed lines (DSL only represents 2, 37% of Internet access), combined with the gradual drop in the cost of mobile connections, which is lower than fixed Internet (no investment in equipment, prepaid consumption).
- The diversification of brands present on the Ivorian market and the multiplication of their products, adapted to the specific characteristics of the continent. New players, often from China: Infinix, Huawei, InnJoo, Itel, or X-tigi, caught onto the opportunity that African markets offer and arrived with very aggressive price strategies. In 2018, the top 5 brands most bought in Ivory Coast according to an Ipsos survey are, respectively, Infinix, Itel, Samsung, X-tigi and Tecno. The consequence of the popularity of these brands is a constantly dropping average price. In 2017, the average price of a smartphone bought on Jumia in Ivory Coast dropped to USD 94 (57,000 FCFA) compared to USD 107 (65,000 FCFA) the previous year.

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**"Beyond the savings made on their phone budget, young people view Whatsapp as a precious ally in interacting and organizing against authorities."**

## THE MOBILE, A RANGE OF ALTERNATIVES

### Communication

The explosion of smartphone equipment in such a short time is a remarkable growth driver for telecom operators, whereas Orange, MTN and Moov have seen their profitability erode under the effects of apps offering Internet-based messaging and voice services (Skype, WhatsApp and Viber)

On the African continent, Whatsapp's progress has been dazzling. These days, many Ivorians, for their private or professional life, favour Whatsapp for calling each other, but also for sending texts, photos and videos, particularly for group discussions.

Beyond the savings made on their phone budget, young people view Whatsapp as a precious ally in interacting and organizing against the authorities. In Burkina Faso, during the fall of Blaise Compaoré, many group conversations circulated between demonstrators trying to avoid police forces, while the official channels, including telecom operators, were muzzled by the regime.

### Finances

With Orange Money, Ivoirians can transfer money, but also pay their bills for electricity, water, their children's education, their TV, without going anywhere, or recharge their toll booth tag, or their fuel card.

In a country where mutual assistance is a duty, Bip Service enables Orange Money clients to send requests for money transfers to friends and family via Orange Money; for its part, MTN has partnered with Ecobank to develop bridging services between bank account, card and mobile money.

Recently, Orange and MTN announced the creation of a joint business venture, Mowali, which will promote the immediate interoperability of their mobile payment services in the 22 African markets where these groups total more than 100 million client accounts. For Stéphane Richard, CEO of Orange, "Mowali constitutes a significant step forward enabling mobile money to become a universal means of payment in Africa."

These days, the two operators are expanding their financial services offering to savings, small-scale loans and bank card partnerships with the banking networks.

### **Learning**

Of all the digital revolutions, the e-learning revolution is doubtless one of the most structuring developments for Africa. Online education should enable the millions of professionals the continent needs for its development.

Orange, through its programme "Grande école numérique africaine", aims to mobilise its infrastructures, access and expertise to help Africa meet the challenge of training young people, particularly in professions related to digital technology.

The first partners in this programme are big French institutions, such as the CNED and the Instituts Universitaires Technologiques or the Université Virtuelle de Tunis, an international pioneer in online teaching offering digital technology classes to all Tunisian students for over 10 years.

## **Energy**

Orange Energie launched a solar product in Burkina Faso which should soon be extended to Senegal, Mali, Guinea and Ivory Coast. The product comes in the form of a kit including a solar panel, a battery and accessories (LED bulbs, kit for recharging several phones, radio and/or TV set). These solar kits, which will light the entire house, charge the household's phones, operate a radio, or even a TV, are accessible through weekly, monthly or quarterly subscriptions. Payable via Orange Money, the monthly subscription is around 13 euros.

For its part, MTN Ivory Coast entered into a partnership with Lumos, an off-grid solar energy company. The lucky owner of the Lumos solar kit will be able to pay through an instalment plan; he will make his monthly payment over the phone via his MTN money account and in return will receive a code for unblocking the system to use his kit.

## **Health**

In Ivory Coast, since 2012, the Health Ministry has distributed an electronic vaccination log operating via a mobile phone. When a baby is born, the maternity hospital suggests that parents provide their phone number so they can then receive text message on the importance of vaccination and appointment dates for their child's boosters. While in 2012, this electronic log was used by 72,251 women, four years later, 483,875 women were already using it, particularly in rural areas.

The PRECIS training programme for midwives and nurses is based on a brand new mixed model of e-learning training & local tutoring at health care locations, assisting learners in improving their health care practice.

MTN set up its MTN Health platform to solve the problem resulting from a lack of doctors. In many countries in the sub-region, the doctor/population ratio is only around 1 doctor for every 10,000 inhabitants. Medical consultations over the phone have become a big success, helping to reassure worried callers, give them emergency instructions and, if needed, direct them to health care centres.

## THE MOBILE, OMNIPRESENT

Like most Africans, Ivorians are gradually turning their mobile phone into an object that can do everything.

It's pay day. Sitting on the terrace of a maquis, Adama or Aminata check that their salary has been paid onto their Mobile Money account. The e-bills are already accumulating in their message centre. They will use their mobile to pay bills for electricity, water, car insurance, private school for the two youngest daughters, and the Canal+ subscription. Later, Adama will watch the Real Madrid-Barcelona soccer match, which he downloaded onto his operator's platform. From the village, Aminata's elderly mother texts her asking her to send 10,000 FCFA. She needs to pay for her health e-check-up. She will do the transfer later, just after visiting their favourite social network where she campaigns with many other people to help counter how expensive life is. Activists put promotions and good deals online, in real time, to save money in Abidjan, and it's very practical.

Opposite them, a group of young people are playing online on their smartphones. In the bus taking him back home, Adama observes with amusement a woman excitedly watching her favourite series on her smartphone while a student seems absorbed by his online class. Come to think of it, do all these people still have the time to "telephone"?

ARE WE ONE?





## INTEGRATING E-COMMERCE

### **Pélagie Kouassi**

Senior Researcher

### THE CONTINUED EXPANSION OF THE MARKET

Yolande is a participant in an Ipsos focus group. A native of Abidjan, she lives in the Palmeraie district but works in the Plateau. Yolande describes how, last week, she ordered toys and cosmetic products for her children on her smartphone. The delivery came two days later to the bank where she works. After checking the parcel, she paid the deliverer cash.

Order online, pay cash on delivery: welcome to the world of e-commerce in Abidjan. *"I work all day, and it takes me more than an hour to get home... when I leave the office, I don't have time to go shopping. So every day, I go to the Jumia.ci site and look to see if there are any interesting offers, it's like shopping without leaving home."*

According to a McKinsey study, by 2025 electronic commerce could represent 10% of retail sales in the biggest African economies and this market will be worth 75 billion US dollars for 600 million consumers.

This new type of commerce entered Ivory Coast in 2012 with the popularisation of the smartphone and growing use of the Internet.

In less than five years, the country has become one of the leaders in Africa in the development of the digital sector, just after South Africa, Kenya and Nigeria. According to the Minister of the Digital Economy, subscriptions to telecom and mobile services in Ivory Coast went up from 16 million five years ago to 25 million in 2017. During the same period, Internet access went from 200 thousand to 9 million subscribers by late 2016. Use of mobile money shot up, with 8 million users today for the three mobile operators: Orange Ivory Coast, MTN Ivory Coast and Moov.

Admittedly, in a city as large and inundated as Abidjan – whose network of physical stores is still small with a limited product offering – e-commerce simplifies life, enables product and price comparisons, and expands the range of possibilities.

Boosted by the rise in the middle class and by a part of urban youth, e-commerce is viewed by a growing number of Ivorians as a way to do their shopping without wasting time and to get good deals. According to an Ipsos study<sup>16</sup>, 45% of Ivorian e-commerce buyers emphasised the good value for money of the products sold compared to the product offering in physical stores, which they criticise for the high prices on imported products, but also the very limited choice.

Sale of fashion articles, home furnishings, household electrical and high-tech appliances, hygiene and beauty products, food items, but also hotel bookings and ordering meals online: an increasing number of categories are concerned.

## TRUST, A REAL CHALLENGE

Winning the trust of Internet users in the country of “brouteurs” and online scamming, in cities that mostly don’t have addresses, that is where the challenge lies. E-commerce players were quick to understand that the solution was to separate online purchase and online payment, with delivery to the workplace.

According to a study carried out in 2017 by Jumia (the leader in e-commerce in West Africa), 16% of Ivorian Internet users visit its site every month, with 42% women and 58% men, i.e. a 27% increase in two years: 16% of the 9 million Ivorian Internet users are therefore regular cyber-buyers, i.e. 1,440,000 Ivorians.

This performance deserves to be highlighted; in comparison, within the sub-region, only 8% of the total number of Ghanaian Internet users and 3% of Senegalese Internet users visit Jumia every month.

49% use the Internet at the workplace and 51% use their mobile to access the e-commerce site. The most commonly ordered product categories: telephones, televisions and household electrical appliances.

Afrimarket is the other tenor on the e-commerce market in Ivory Coast. The e-commerce platform also enables Ivorians from the diaspora to buy products in the five Francophone countries where Afrimarket has subsidiaries. In addition, Afrimarket offers its customers a range of local e-commerce products. Within the diaspora, the average budget is 150 euros. In Africa, it is around 90 euros.

## FROM SECTOR TO ARENA, WHEN COMPETITORS ARRIVE FROM ALL OVER

Due to growing demand, the e-commerce sector has further intensified in Ivory Coast. On the one hand, the historical online commerce sites, marketplaces like Jumia, Afrimarket and the most recent arrival, Wasiri, specialised in online fashion.

On the other hand, middlemen sites like Vendito (which recently became deals.jumia.ci), a web-based classified ad and networking site, Hello Food, banabana, BabiKen (Ken, an Ivorian expression meaning business, and Babim, meaning Abidjan). And now, new players such as Yaatoo, the leading curbside pick-up e-commerce site in Ivory Coast, launched in July 2016 by the PROSUMA Group, the leader in physical distribution with over 150 stores. The site aims to save its supermarket clients time by enabling them to order on an online web platform and then pick up their boxed order. For the past few months however, following the signature of a partnership with the Ivory Coast Post Office, Yaatoo has moved to delivery, which has made its service even more popular.

The Librairie de France Groupe (LDF) has also gone digital with a view to diversifying its sales and increasing its customer base. The online purchasing service of the biggest book distributor in French-speaking black Africa has increased enthusiasm among the Ivorian population.

Alongside the multinationals, a proliferation of new, locally-based online sales sites has been observed.

- Kaymu Ci: positioned as the leading Marketplace enabling its products to be bought and sold more easily in Côte-d'Ivoire, particularly in big cities such as Abidjan. Like Jumia.ci, Kaymu belongs to the German start-up incubator group Rocket Internet. Kaymu is in the process of putting the huge Adjamé market, in central Abidjan, online.

- Shop.pdastoreci.com: a platform specialised in the distribution of smartphones, tablets, notebooks, accessories and the latest generation of mobile appliances with all the favourite brands.
- Kenneur.net: a web platform presenting itself as a veritable online trading social network. It operates along the lines of free classified ad sites, enabling users to buy and sell goods or services, and look for jobs.
- Emarche.net: a local e-commerce web platform enabling products to be ordered online and delivered.
- Atrê (atre.co.com): for purchase and delivery of all kinds of food products (fish, meat, tubers, greens, vegetables, grains, fruits, spices, shellfish...) at very low prices, and of very high quality.
- Babishopping.com: a web platform for online sales, free advertisements and classified ads.
- 2kboutic.com: an electronic boutique (mobile phone, smartphones, tablets, PC and local IT Accessories) where buyers can find good deals.

For local producers and creators, e-commerce is an absolute godsend in terms of making themselves known to a maximum of people and distributing their products quickly.

E-commerce is establishing itself as a priority distribution method for another reason, and one that should definitely not be under-estimated: the cost of a physical store is often beyond the reach of a small Ivorian company. So it's easier to understand why, in 2016 for example, 88% of sellers on the Jumia Ivory Coast platform were small companies (VSE and SME).

BICICI, a subsidiary of BNPP in Ivory Coast, got it right when it launched a complete range of products for facilitating and managing online payments with a view to helping e-commerce players generate higher turnover.

ARE WE ONE?

**YUP**  
Vivez  
positif

## INVENTING SOLUTIONS

### **Yolande Tape**

Project Manager Quant

## YUP, AN ALTERNATIVE MODEL TO THE TRADITIONAL BANK CREATED BY SOCIÉTÉ GÉNÉRALE IN AFRICA.

### **Access to banking services via the traditional channels is progressing slowly.**

The Société Générale de Banque en Ivory Coast (SGBCI) – a subsidiary of Société Générale – has been in Ivory Coast for over 50 years and has established itself as a reference bank on the national market.

With more than 1,000 employees, in 2017 the SGBCI produced a net result of 30,895 billion FCFA and holds a market share of over 19%. In 2018, it was named “Best Bank in Ivory Coast” for the second consecutive year by the magazine International Euromoney.

Nevertheless, despite this enviable leadership position, the SGBCI is not necessarily the leading financial partner for Ivorian households. Indeed, in Ivory Coast as in most countries of Sub-Saharan Africa, the rate of access to banking services is low, never exceeding 20% according to a recent study by the BCEAO<sup>17</sup>. There are many reasons for the lack of access to banking services among households: an insufficient network of branches, price policies and services ill-suited to low incomes, but also a traditional distrust of banks among a large part of the population, and the cool reception given to households with limited potential...

Thanks to (?? c'est marqué "en dépit de" dans la VF) the efforts made by players in the banking world and the recent government campaigns encouraging people to open bank accounts, the rate of access to banking has progressed: Ivory Coast saw the rate of bank account access more than double in ten years, going from 7.1% in 2007 to 19.6% in late 2017, i.e. within the average for the WAEMU.

But this progression is very relative when compared to the penetration rate for Mobile Money in the same period: 9% to 44.9%!

## COMPETITION OVER PHONE-BASED FINANCIAL SERVICES

The telecom operator is the alternative to the classic banking players:

- Ivory Coast counts 7.5 million Mobile Money accounts.
- The volume of Mobile Money transactions in the country reached 17 billion CFA francs a day in 2017.
- Money transfer is the main service, representing at least 90% of the transactions volume.

As the Chairman of Orange Money Cote d'Ivoire, Jean Marius Yao, states: "Côte d'Ivoire is among the countries where the number of mobile accounts exceeds the number of traditional bank accounts."



## YUP: SOCIÉTÉ GÉNÉRALE FIRES BACK

Via SGBI in Ivory Coast and SGBS in Senegal, the bank decided in 2017 to launch an alternative model to the traditional bank to counter-attack mobile operators.

Named YUP, this “e-wallet” solution provide access to a full range of transactional and financial services, without having a bank account. Leaning on a network of third-party agents with whom the bank has formed partnerships (petrol stations, distribution outlets), YUP is accessible via an extensive network of distributors equipped with the corresponding terminals and using the mobile banking apps of Société Générale’s various banks on the continent.

The goal is clear: open 1 million wallets in the next three years, in other words, double the base of private clients of Société Générale in Sub-Saharan Africa and create a network of 8,000 agents to serve them.

The launch of YUP should enable Société Générale to meet the needs of a customer base who, until now, had remained far from the banking system, by offering proximity, easy use and a very high level of availability.

How?

By entering an existing ecosystem that is practical and simple, the retailer ecosystem, where clients can withdraw, deposit or transfer funds, pay their bills, purchase phone credits and make payments. Note that an equivalent approach was taken in Indonesia for the same public, providing access to a whole range of products and services that they previously thought they were excluded from or believed to be inaccessible.

Six months after the launch of YUP, Société Générale commissioned Ipsos to monitor the evolution of its subscription campaigns and provide feedback on satisfaction with services among the initial waves of subscribers.

In both countries (Ivory Coast and Senegal), our studies have highlighted the gap between the campaign's powerful impact and a more modest conversion rate. The YUP campaigns were generally well memorised, particularly thanks to very attractive visuals, a bright red colour and a striking slogan: *"Vivez positif"*. Nevertheless, the popularity of the campaigns did not necessarily prompt the massive opening of YUP accounts.

Within a highly competitive landscape where telecom operators dominate and saturate the advertising space with regular campaigns on their mobile money services, a single campaign was never going to shake things up profoundly. So it is clear for Société Générale that a regular advertising protocol needs to be set up in order to establish YUP in consumers' minds.



## THE CHALLENGE YUP FACES: TOPPLING A BELIEF

Some consumers who saw the campaigns didn't in fact necessarily understand that they didn't need to open an account in a Société Générale branch in order to sign up for a YUP account.

YUP faces a dual challenge:

- Breaking the image of a bank that only offers services connected to a bank account,
- Getting away from the paradox between the endorsement of a classic brand and the creation of a new type of access.

Société Générale's fame and good reputation in the banking world constitute an asset in terms of credibility and reliability for YUP, but its image as a banking institution in West African countries remains "rigid", "distant", or even "haughty", symbolised by branches that many households wouldn't even dare to enter.

How do you turn YUP into an independent brand, dedicated to Mobile Money?

New campaigns will need to help build the image of YUP as a mobile money player in its own right, offering competitive services to people with or without bank accounts.

Beyond questions relating to YUP's positioning as a mobile money operator, separate from the Société Générale network, other questions were raised by the research findings, more specifically concerning the key role played by service points.

Indeed, although Mobile Money by its very nature offers access to digital services, consumers need physical service points located on their daily routes.

The Mobile Money agencies of the three telecom operators have taken possession of the Ivorian and Senegalese urban landscape. These small boutiques or sales outlets, painted in the colours of each operator (Orange, Yellow or Green), are visible on every street corner. The Mobile Money contact points war is raging and consumers also tend to sign up for an account based on the network: the more space the network takes up, the more chance it has of winning new subscribers.

Beyond the difficulty in understanding YUP's positioning and operation, the initial waves of subscribers have highlighted two barriers to subscription linked to the network: the impression that there won't be enough service points and that YUP agents will not be available enough.

Getting involved as a Mobile Money player therefore requires, in addition to a clear positioning, being regularly present in the advertising landscape and having a broad distribution network located close to working-class households.

Société Générale has now strengthened YUP's visibility for the general public: permanent presence via banners on the HKB bridge which connects the two parts of the lagoon to Abidjan, YUP leaflets and stickers in all Société Générale ATMs, and 4x3 billboards on the city's biggest traffic arteries.

Société Générale clients are invited, via text campaigns, to sign up and to download the application. Moreover, Société Générale is trying to increase the amount of transactions. Based on the text campaign, YUP incites its clients to make deposits on their account and use them in transactions, with bonuses to be earned as a reward.

## MOBILE MONEY, THE COMPETITION EXPANDS

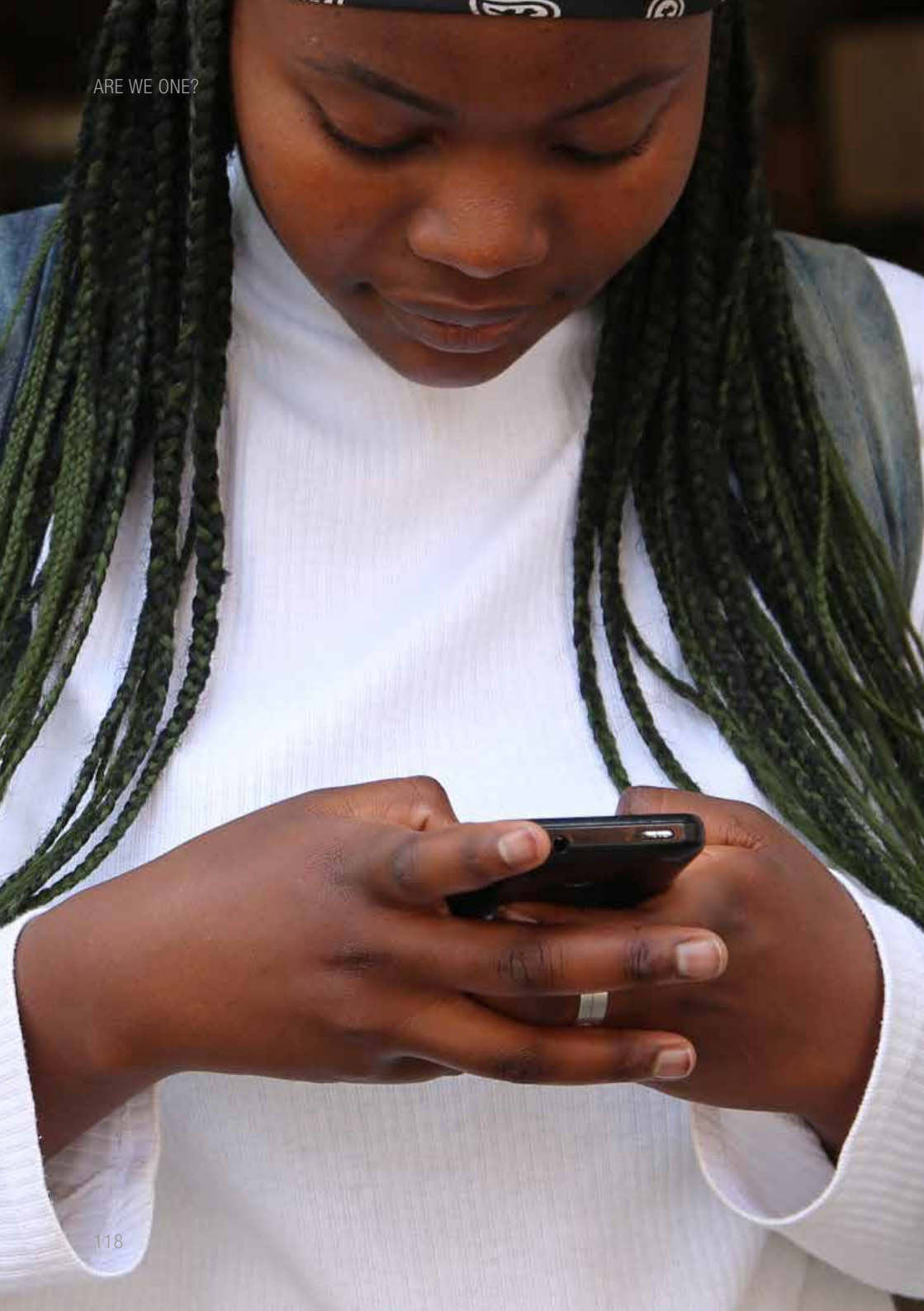
On February 15 of last year, the Senegalese FinTech WorldRemit and Ivorian QuickCash announced that they had entered into a partnership enabling the public to transfer money instantly in Ivory Coast via mobile.

Banque Atlantique, meanwhile, launched a product that enables a client to send money inside the country or abroad, with the end-user having the option of withdrawing funds from one of the network's ATMs without a debit card, just a code and reference.

Standard Chartered Bank is now offering a digital product.

With neighbouring Ghana, Ivory Coast is now among the most prolific West African countries on this market, a real force that is driving growth in the zone which, according to the latest GSMA report on mobile money<sup>18</sup>, represents the second biggest market on the continent with USD 5.3 billion, behind East Africa which totalled USD 13.2 billion in transactions in 2017.

ARE WE ONE?



## SURFING THE SOCIAL NETWORKS

### **Gustave Agbodan**

Head of Marketing Understanding

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According to the Ipsos African Youth study carried out in 2016, 15/24 year-olds in Côte Ivoire spend an average of 2 hours 20 minutes a day on the social networks, as opposed to 1½ hours watching TV.

The study also shows that the social networks play a predominant role in informing young people and in influencing purchase. Hence, 42% of young Ivorians claim to be influenced by the social networks when it comes to their purchase decisions and choice of brands.

In Ivory Coast as in many other countries, a new power has developed: blogger power. An increasing number of French-speaking Africans publish blogs or host their own shows on the social networks with a wide reach.

Blogs are websites on which an Internet user keeps a personal column or one devoted to a specific topic. In Africa, where it is hard to distribute information using the traditional channels and where the media are often muzzled by the authorities and by traditional decorum, blogs enable free expression, while opening up the discussion to subjects that hit home, and that are sometimes brand new, often controversial.

So let's meet a few of them...

## A LITTLE BLOGGER HISTORY

Until recently, the blogger phenomenon was mainly the prerogative of English-speaking Africans.

The whole of Africa is familiar with the success story of Nigerian Linda Ikeji and her celebrity blog [lindaikejisblog.com](http://lindaikejisblog.com). After starting out at a cybercafé, she has become one of the biggest Nigerian influencers, with a fortune now estimated at USD 10 million. These days, Francophone Africa has joined the effervescence of the continental web. Bloggers have become the influencers and/or alarm-raisers of a population, especially young people, looking for new sources of information that are more objective and familiar than the traditional media.

In 2017, the Ivorian web counted around 17 million Internet users, i.e. 22% of the population. According to estimates from Medianet, 3,500,000 Ivorians have a Facebook account, including 69% of men. Abidjan, the country's economic capital, comes out on top, with a remarkable majority of 3,300,000 users. It alone accounts for almost all the country's Facebook users, with a percentage of 94.28%.

Ivorian bloggers are making the most of the growing penetration of the mobile Internet and the craze for the social networks, but also the growing need for free expression and better information.

In 2015, the Union Nationale des Blogueurs de Côte d'Ivoire (UNBCI) was created to popularise the use of information and communications technologies and democratise blogging in Côte d'Ivoire.





## MAKING HISTORY, BIG TIME: NATIONAL CELEBRITY BLOGGERS

**THE ICON OF THE IVORIAN WEB:** **Edith Brou**<sup>19</sup>, the emblematic figure of the Ivorian web. Tech-entrepreneur, blogger, digital manager, YouTuber, she is also co-founder of the webzine Ayana and president of the Association de Blogueurs de Ivory Coast. At the age of 33, she is the symbol of a generation determined to change things through technologies and the social networks, and she encourages young people to believe in themselves.

**THE POPE OF FASHION:** **Patrick Edoard Kitan**, fashion and lifestyle columnist, creator of BTENDANCE, a fashion and urban culture webzine. The content is available on the btendancewebzine.com website and on the issuu.com platform, where you can leaf through the magazine just like a paper version. The webzine is followed regularly by over 21,000 fans on Facebook. BTENDANCE organises events such as BNIGHT (an acoustic evening) or fashion shows like BTENDANCE X DABIRA. In September 2018, BTENDANCE hosted the Runway Fashion Days, four days devoted to spotlighting luxury prêt-à-porter, Made in Africa.

**THE PUBLIC AGITATOR:** **Daouda Coulibaly (His Majesty).**

With his blog “La voie des sans voix” (Voice of the voiceless), Daouda is one the best-known Ivorian bloggers. A web activist, he is viewed as one of the most influential columnists in Ivory Coast. A defender of freedom of expression, in partnership with Radio Netherlands Worldwide (RNW), he initiated several events in Côte d'Ivoire enabling young Ivorians to speak out frankly to help promote national reconciliation.

**THE WEB AMBASSADOR OF CÔTE D'IVOIRE: Amenan Tanoh.**

A huge fan of fashion, literature and travel, Amenan runs the blog Kita By Amenan Tanoh along with a webzine: Fall In Mode, of which she is the co-founder and editor-in-chief. In 2015, Fall in Mode won the prize for best medium for the promotion of fashion in Côte d'Ivoire. For Amenan, fashion and tourism represent the sectors of the future that the African continent must wager on.

**THE BUZZMAKER: Jeff le Béninois.**

Followed by more than 89,000 people, Jeff is the web's buzzmaker. Much loved by young people for his funny posts and advice, Jeff Le Béninois boasts 10,000 likes a day for a single post on the web. He is also a promoter, artist agent and manager of a Web communications agency, "JLB Consulting".

**THE CRAZY YOUTUBER: Florent Amany.**

Known under the name Observateur Ebène, Florent is the most famous of Ivorian YouTubers with 115,531 subscribers and 545,336 subscribers on Facebook, 78,183 followers on Twitter and 434,124 on Instagram. This IT engineer became the Ivorian web clown through publishing short and hysterically funny videos where he films himself giving his opinion on just about anything. He notably created a buzz with a selfie video where he provokes Islamic terrorists directly with his message "we're not going to stop living for you".

**GLAMOUR, IVORIAN-STYLE: Konnie Touré.**

One of the finest voices on the Ivorian radio, Konnie is one of the best hosts of her generation. Presenter of the TV programmes On s'éclate, Glam Africa, l'Afrique à un Incroyable Talent, Konnie Touré is programme director at Vibe Radio Ivory Coast. She is also the ambassador for the beauty brand Soskin. She enjoys a huge audience on the social networks in particular.

## THE NEW ALLIANCES, BLOGGERS AND MARKETING

The synergies between brands and these bloggers who are listened to, and even completely trusted by, hundreds of thousands of consumers, are obvious; they have been favoured and accelerated by the drop in price of mobile Internet plans and the increased consumption of video content (especially in AutoPlay on Facebook and on Instagram). New digital influencers are thus emerging in sectors like beauty, fashion, entertainment venues, automobile, interior decoration. Every day they draw thousands of fans on Facebook, Instagram, Twitter and Snapchat.

The French brand Soskin made Edith Brou, known as “la geekette”, their web ambassador.

On the eve of Valentine's Day 2018, MTN Ivory Coast invited fashion blogger Amenan Tanoh to take over its Snapchat account to provide advice, guidance, tips and to subtly highlight the brand's tagline “Everywhere you go”. The brand went on to repeat that experience for several sectors: entrepreneurship, education...

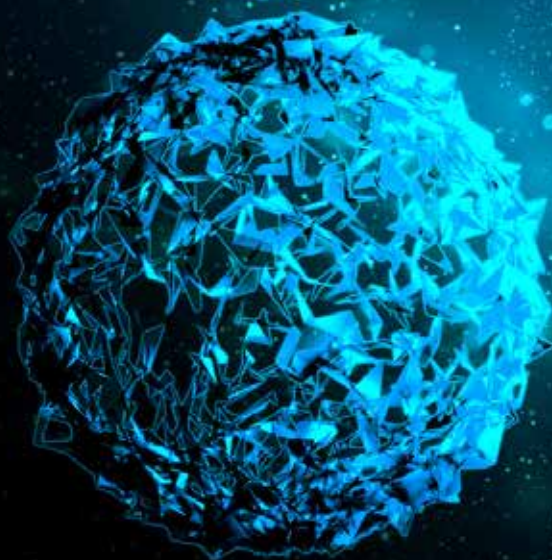
The fashion designer and Instagram artist Loza Maleombho ran the digital campaign MyChicAfrica for AccorHotels and Air France. A veritable invitation to travel into the heart of a vibrant Africa, encouraging African influencers to become the ambassadors of their continent, on both local and international level.

Blogging has caught the imagination of many young Ivorians and Africans: talking about their passion, even living it, being followed on the social networks, getting away from digital anonymity and becoming famous and, why not, rich...

Since January 2018, the Ivorian government has initiated a vast information and training programme for professions within the information and communications technology sectors: in partnership with the Union des Blogueurs and the NSUT, initiation and training caravans started to criss-cross the country. The training modules have focused on blogging and Web writing, cyber-criminality, web content production techniques, Internet bases, and how to become a blogger.

For most of the people learning, it was about discovering computers. For Soro-Kipeya Euloge, Director of the ANSUT, the country's development calls for massive appropriation of the NICT by a maximum of people: *"in the past illiterate meant not knowing how to read and write, but the illiterate person of today and the future is the person who doesn't know how to use IT tools."*

ARE WE ONE?



## TACKLING PROBLEMS HEAD-ON

### **Parfait Anoh**

Head of Innovation

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HIV AIDS is one of the most destructive illnesses in terms of public health. According to UNAIDS<sup>20</sup> in 2016, almost 36.7 million people were infected worldwide and of those, 26 million live in Sub-Saharan Africa.

In Ivory Coast, an estimated 3.2% of the population (in 2015) lives with HIV according to the same report by the international organisation, with one of the highest prevalence rates in West Africa, as emphasised by the Mouvement Ivoirien des Droits Humains (MIDH) and Human Dignity.

According to UNAIDS, 460,000 people live with HIV in Ivory Coast and 25,000 deaths are directly linked to the disease; and the number of children orphaned due to HIV is evaluated at 230,000.

Only 45% of people infected by HIV are aware of their serological status. This is particularly clear in Sub-Saharan Africa where the prevalence rate for HIV is strongest. In Ivory Coast, around 62% of women and 75% of men had never done a screening test in their life according to the Etude Démographique Sociale (EDS) conducted in 2011-2012. Very few people are screened for HIV AIDS, whereas the statistics have proved a correlation between being screened and the impacts of HIV on the population.

Faced with these figures and the population's unfamiliarity with viral diseases, the ANRS (l'Agence Nationale de Recherches sur le SIDA et les Hépatites Virales) in partnership with the Institut d'Ethnosociologie (IES) at the Université Felix Houphouët Boigny in Abidjan, the ENSEA (Ecole Nationale de Statistique et d'Economie Appliquée), the PAC-CI Programme and the CEPED (Centre de Population Et de Développement), initiated the DOD-CI study: *"Demande et Offre de Dépistage du VIH et des hépatites virales en Ivory Coast"* (Demand and offer for HIV and viral hepatitis screening in Ivory Coast).

A creative research set-up: three major surveys to accelerate public policies and incite Ivorians to get screened.

Launched in February 2016, the DOD-CI survey has set itself the goal of identifying the barriers to screening among Ivorian populations and ascertaining usages & attitudes within the population in relation to AIDS and viral hepatitis.

The study set up by Ipsos comprises three successive phases. The phone survey approach (CATI) was selected, given the fact that AIDS is a taboo subject in Sub-Saharan Africa that people find hard to talk about *"eye to eye"*.

The phone survey was effective, since the respondents were more at ease with answering anonymously. Moreover, this type of approach has the advantage of speed and of dealing with the problem of heavy geographic scatter in a country where specific ethnic characteristics and rural/urban differences must be taken into account.

SURVEY no. 1 targeted the population in general, the population of 16-59 year-olds with national representativeness; 3,000 people were thus questioned randomly based on the Kish grid.



Whether male, female, a child, everyone is in fact concerned by HIV and hepatitis. So it is interesting to see how the population overall behaves in relation to these diseases. To choose a respondent, a two-degree selection is carried out: a household is selected randomly from among the eligible households corresponding to the survey sample, the respondent himself is then selected randomly from among the eligible people in the household.

SURVEY no. 2 concerned health care players. 900 health care providers (midwives, nurses and doctors), aged from 18 to 69, working in Ivory Coast and listed with the Ministry of Health and Public Hygiene were questioned over the phone. Their goal? Identify to what extent the fact of not getting screened is linked to health care providers: do they play enough of an advisory role among the population? Do doctors, midwives or nurses really offer screening tests to patients? If so, how do they offer them? Is this an incentive? What do they themselves expect of the authorities to help them with this task?



SURVEY 3 is definitely the most delicate to implement. Indeed, this wave concerned a population particularly vulnerable to the disease, homosexuals. According to the EDS (Etude Démographique et Sociale) in 2012, 18% of people claiming to have sexual relations with other men were HIV carriers. In a country where homosexuality is subject to heavy moral condemnation and where gays are frequently attacked, the challenge involved in identifying this target and convincing them to take part in the survey was huge. This group often constitute “the shadow part” of HIV surveys in Africa, since gay people very rarely agree to talk about the subject.

A “cluster” approach with a “snowball” effect was selected. The initial clusters were people identified during field work in several Ivorian cities, since they are active in the LGBT community. Alongside this, during Survey no.1, questions about sexual habits were asked to the sample representative of the Ivorian population and some of the respondents agreed to be re-contacted for wave 3. But very few people who claimed to have homosexual relations agreed to take part in this specific survey. Fear of losing their anonymity and the risks that go with that were clearly a barrier to be removed in creating this specific sample.

Ipsos therefore set up a call system using a toll-free number to guarantee anonymity for respondents, and interviewers specially recruited because of their empathy for the gay community were present to administer the questionnaire.

The study was completed in December 2018 with a view to developing strategic recommendations for the creation of an action programme aimed at inciting Ivorians to get screened and raising more awareness among health care providers about HIV screening.

Across Africa, surveys aimed at providing the necessary data for managing public health policies are progressing. Ipsos is in the front line in collecting and analysing that data.

A mathematician and demographer by training, Arsene KRA is the Ivorian manager of the DOD-CI project. His testimony explains the challenge that had to be met:

*"Implementing this survey set-up here, in Ivory Coast? Yes, challenge is the word! The methodologies used, the phone for better geographic scatter or the toll-free number, are frequently used in Europe but it was a first in Ivory Coast. Whether it's about the population, health care providers or particularly at-risk targets, it's reassuring to observe that everyone worked together in collecting this data. It's encouraging for future surveys on Public Health subjects."*

And Joseph N'Dri of Ipsos Ivory Coast is not one to disagree:

*"I'm particularly proud as CATI manager to be working on surveys whose results will help to improve Public Health in my country... You do feel satisfaction at helping to set up knowledge and management tools without which it's impossible to conduct effective prevention work on the plague that HIV-AIDS represents in Ivory Coast."*

ARE WE ONE?



## OPTIMISING AND HUMANISING RESOURCE AND PEOPLE MANAGEMENT

### **Issa Tahirou**

Senior Researcher

Marketing Understanding

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Ivory Coast, whose economy is mainly based on agriculture, is the leading international producer of cocoa, with a 40% market share: it is the main cash crop that the country has leaned on in building its development since 1960.

But over the past ten years, the cocoa sector has entered into an era of uncertainty, notably marked by the tangible drop in income among small farmers, the lack of investment in plantations and the drop in profits. Alongside that come diseases affecting the cacao tree, the most alarming being the Swollen Shoot and Brown Rot, which are responsible for other diseases and for the loss of 30% of annual cocoa harvests.

Far from improving, the Cocoa industry in Ivory Coast is also implicated in burning issues such as child labour, environmental protection and poverty in rural areas. Since these subjects are closely linked to international quality standards for cocoa production, they have incited many growers to abandon cocoa production in favour of other, more lucrative and less labour-intensive crops, such as rubber and palm oil. The stakes are high for industrial chocolate companies since Ivory Coast is one of the main supply channels. Their involvement in the renaissance of the cocoa industry in Ivory Coast is a good example of strategies transposable to other sectors.

## THE COCOAACTION PROGRAMME AND LARGE INDUSTRIAL COMPANIES

Confronted with insufficient State support for farmers and the fear of seeing cocoa production collapse, several large multinational cocoa milling operators and chocolate-makers (Cargill, Bloomer, Ferrero, Hershey, Mars, Mondelez, Nestlé and Olam Cocoa) have taken initiatives and become increasingly involved in the cocoa production chain.

They all provide technical assistance through trainings provided to plantation owners, financial support for grower associations, or more directly, through the creation of industrial plantations.

This new form of synergy between brand players represents a new turning point in the management of the Cocoa industry in Ivory Coast, a very oligopolistic market in which almost all (around 99%) market shares are held by around ten milling companies and chocolate-makers.

These major industrial companies in the sector have therefore laid down standards grouped under the term "Sustainable cocoa", a set of production regulations that must respect three essential aspects: economic, social and environmental.

Despite major investments in cocoa sustainability initiatives, cocoa production is still confronted with major challenges and is losing its appeal as a viable means of subsistence.

The reason for this semi-failure stems from the various isolated and fragmented initiatives, the lack of coordination between stakeholders in the sector, efforts focused on the supply chain and insufficient interventions in the field to tackle the deep causes of non-sustainability.



## RATIONALISE, STRUCTURE, ACCOMPANY

To make up for the insufficiencies of the initial reform, the main cocoa and chocolate companies from across the world came together in Ivory Coast in May 2014 to launch the CocoaAction programme, a new strategy to support the cocoa industry and improve means of subsistence for cocoa growers.

The result is a set of key performance indicators (KPI) which should underpin all CocoaAction's activities in Ivory Coast, grouped together into two main categories:

### 1. KPIs for productivity.

- The number of cocoa growers applying a minimum number of good farming practices.
- The number of cocoa growers adopting improved plant materials to restore a minimum percentage of their old or non-productive cacao trees.
- The number of cocoa growers adopting soil fertilisation and fertility practices for their cacao tree plantations.
- The food self-sufficiency policy.

### 2. KPIs for the community.

- The number of children involved in child labour as defined by the International Labour Organisation.
- The number of women in managerial posts (e.g. trainers, managing farmers, agricultural extension agents) within farming organisations.
- The percentage of school-age children who regularly attend school.
- The funding of income diversification micro-projects.

The World Cocoa Foundation (WCF), which is in charge of coordinating the CocoaAction strategy, is monitoring and evaluating the programme with Ipsos to ensure the impact and efficacy of its actions in the field, notably: *"a transformed cocoa sector offering a lucrative lifestyle to professional cocoa producers who are economically independent, while offering a much improved quality of life for cocoa-growing communities<sup>21</sup>".*

To ensure better monitoring of CocoaAction's achievements and measure the performance indicators (KPI) identified, the WCF and its partners have set up:

- Community development workshops with all the players concerned: Conseil du Café-Cacao, CARE, International Cocoa Initiative (ICI), ministries involved in education, Agriculture et le Genre??, unions and private-sector partners.
- Monitoring and evaluation studies in barometric form conducted annually, and entrusted to Ipsos since 2012.





## THE IPSOS BASELINE STUDY, MANAGEMENT ASSISTANCE

The methodology set up by Ipsos for monitoring and evaluation features a Baseline study launched in 2015 and scheduled measurements in 2017 and 2019.

The first wave started with a depth study to evaluate the strengths and weaknesses of implementation of the programme for each industrial company (Mars, Cargill, Barry Callebaut, Nestlé, Ecom [Zamacom]) among its producers.

The second, Monitoring and Evaluation, took place in 2017 and was rolled out in two phases:

- Face-to-face interviews with producers with questions covering all the KPIs identified.
- Observation in the field to ensure actual application of good farming practices.

The interviews were conducted among a sample of plantation owners and community members selected randomly (male and female), wives of plantation owners and village leaders (village chief, youth presidents, association presidents).

The observations were made on cocoa plantations and on land used for food crops in the country's five main cocoa-growing zones.

Some results from the Baseline study:

- 97% of producers earn most of their income from cocoa.
- Only 6% of cocoa plantation owners produce other cash crops (cassava, palm oil), which bring in 30% of their total income.
- +/- 40% of women producing cocoa earn 100% of their income from cocoa.
- 97% of plantation owners who are members of co-ops draw their income from cocoa, and 64% exclusively from cocoa.
- Almost 82% do not have access to non-agricultural income.
- Almost 95% of cocoa growers also produce food, mainly for household consumption; and when they sell it, gross income represents less than 20% of total annual income.
- Only 26% of women who produce cocoa are also involved in food production and earn only 10% of their income from it.
- The majority of women have limited resources (land, finance, connections)
- 61% of producers are illiterate with a majority of women.

One metric of particular note: 70% think that they don't earn enough to meet their needs.

Thanks to the results of the Baseline study and the 2017 measurement, the WCF and its partners have emphasized five strategic approaches:

1. Professionalize producers with lucrative plantations (training producers on BPA (best practice assessment??) and access to intrants de vivriers, particularly women)
2. Make women key players in food safety and the improvement of household nutrition.

3. Ensure that women have the same rights as men and create the conditions for their financial independence (assist women with access to resources, useful knowledge and finance, so they can invest in food production and other, non-agricultural activities):
  - Training in business.
  - Creation of Village Savings and Loan Associations.
  - Solidarity groups and food production.
4. Ensure that children go to school and are not involved in dangerous work on the plantations.
5. Finance micro-projects for income diversification.

With regard to the results of the Ipsos study, we observed a good energy within the cocoa sector with repercussions on the living conditions of plantation owners, through better remuneration of their work and stabilisation of their income. Nevertheless, much remains to be done, given the crisis of 2017, which followed the 30% drop in the purchase price.

ARE WE ONE?



SONG

## SONG

### YOU'LL GET THERE

Problems are normal  
Difficulties, they happen  
A lot of traps on the way  
That's life

You can choose to get up  
To fight, to make it  
To show the whole world  
That you can succeed in life

Eyes in eyes  
They'll see

C'est ainsi dit que tu peux le faire  
Don't get discouraged for them  
Each of us has our chance in life  
C'est ainsi dit que tu peux le faire  
Don't get discouraged in life  
Each of us has their path and destiny

But I've chosen to get up  
To fight, to make it  
To show the whole world  
I can succeed, j'ai toujours plié genoux

Bibé Lagô oh! Ôgninan djèkpa krika niê  
Bibé Lagô oh! Énin nouho nouho n'nah djigbo  
Bibé Lagô oh! Ôgninan djèkpa krika niê  
Bibé Lagô oh! Énin nouho nouho n'nah djigbo  
Bibé Lagô oh! Ôgninan djèkpa krika niê  
Bibé Lagô oh! Énin nouho nouho n'nah djigbo oooh!

Lyrics & Music: Molare™

Soumahoro Maury Féré Molare™

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