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The poultry import ban in Senegal: impact on consumer preferences and consumption

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- Domestic chicken is perceived as fresher, tastier and healthier.
- Senegalese who preferred domestic chicken meat even before the ban, would be willing to accept imported chicken at a significantly lower price.
- 57% of consumers are highly ethnocentric and strongly object to a reversal of the import ban.
- The government should ensure low consumer prices, e.g. by exploring local feed ingredients to improve costs in primary production.

Background and aims

In an attempt to prevent the entry and spread of the Avian Influenza virus, the government of Senegal banned poultry meat imports in all forms in the year 2006. Prior to the ban, imports constituted 34% of domestic consumption between 2003 and 2005. Currently, with the exception of value-added products such as nuggets and sausages, all other types of chicken meat consumed are domestically produced. Nevertheless, due to the low level of international competition, in theory consumers would be offered low quality chicken products, a limited product range or pay higher prices than they used to. Empirical studies on the impact of the poultry import ban on consumers' demand, interests and expectations barely exist.

To shed some light on the extent to which consumer interests align with protectionist policies, we (1) assess consumers' perceptions with reference to the import ban, (2) identify consumers' preferred chicken attributes, and (3) analyze the impact of the import ban on consumer welfare. This study is part of the fourth work package of the project "Impact of Meat and Milk Product Exports on Developing Countries" (IMMPEX).

Methods and data

The study relies on focus group discussions (FGDs) and household surveys. The focus groups were held with consumers between February and March 2020. A total of 38 participants were recruited from homes and neighborhoods in Dakar and Thiès, two major cities in Senegal. The household level data was collected between January and February of 2022. A multistage sampling procedure was used in gathering the data from three cities: Dakar, Thiès, and Kolda due to the high pattern of chicken meat consumption. The survey involved 300 households and the questionnaire included a Discrete Choice Experiment (DCE) and a reviewed Consumer Ethnocentric Tendencies Scale (CETSCALE).

The data were analyzed using qualitative content analysis, exploratory factor analysis, probit and random parameter logit models.

Key findings

The focus group discussions revealed that chicken meat is eaten on average once a week or more often in Senegal. Participants expressed a positive attitude towards domestic chicken meat even before the import ban because they perceive it as fresher, tastier, healthier, of higher quality, and are assured of the conditions under which the fowls are raised domestically.

Chicken meat displayed for sale in an open market in Dakar



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Some participants perceived domestic chicken as safer due to the known conditions. However, other participants confirmed that safety issues exist especially with storage and marketing of processed domestic chicken in Senegal. This is especially evident in traditional markets where raw chicken meat is displayed for sale on bare tables without any form of packaging or chilling. The raw meat has a high potential of attracting

bacteria and other food-borne pathogens. Also, decomposition could set in leading to a reduction in quality considering the high tropical temperatures of above 25°C.

Participants stated that chicken meat imported into the country before the ban was mostly in frozen cut portions, packaged in cartons and had labels providing information such as the origin of the product and expiry dates. In contrast, domestic chicken is sold mostly live or in a whole dressed form (fresh or frozen). Chilled domestic chicken cuts are available in supermarkets and cold stores; however, this is a marginal sales channel. According to results of the quantitative survey, whole dressed chicken meat is preferred to cuts. In contrast, with the more liberalized policy on poultry trade in Ghana, for example, imported chicken cuts dominate the market and Ghanaian consumers prefer to have domestic chicken cuts instead of whole dressed chickens. From these two contrasting findings on preferred “product form”, consumption habits seem to persist and affect consumers in their preferences and attitudes. However, the analysis also exhibits some heterogeneity in consumer preference for product form – this means there is a section of Senegalese who would prefer chicken cuts to whole dressed ones.

Chilled chicken cuts in a supermarket



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From the consumers’ perspective in the FGDs, the import ban has contributed to the development of the domestic production sector by providing jobs for many including the youth, resulting in an increased supply and patronage. Yet, a few of the participants mentioned that the ban is impacting negatively on low-income households who no longer have the opportunity to buy chicken in smaller quantities. Based on the data of the household survey, we were explicitly able to identify two groups of respondents: one segment constituting 57% of the sample who exhibit a high level of ethnocentrism (i.e., perceive domestic chicken as superior to imported ones), and the other (43%) with a low level of ethnocentrism. Males, younger Senegalese, the married, and those with high-incomes are significantly more likely to belong to the highly ethnocentric segment, whereas larger household sizes and higher educational attainments lead to a strong and significant chance of belonging to the low ethnocentric segment. Consumers who

are highly educated seem to be more open and liberal. Moreover, highly ethnocentric consumers associate chicken meat stored in deep freezers for longer periods with a loss of taste and strongly object to a reversal of the import ban.

Furthermore, the choice experiment reveals that Senegalese are willing to pay a premium for domestic chicken meat instead of imported frozen cuts. Imported chicken will be accepted only if the price is significantly lower than that of domestic chicken. This means in case the ban on imports is lifted, the majority of Senegalese may continue to choose domestic chicken over imported versions as long as the price difference is small. However, the study already finds a significant price difference between domestic and imported chicken meat.

The Government can assume that those consumers who currently strongly prefer domestic chicken would continue to consume it even if the ban were lifted. However, in that case more households, particularly poorer ones, could have better access to chicken meat. Also, for those households currently consuming domestic chicken, substitution effects cannot be completely ruled out. There might be consumer segments who could substitute or complement domestic with imported chicken meat. In particular, this is likely for those consumers and households who exhibit (i) a low level of ethnocentrism regarding chicken meat (and are safety conscious), (ii) those who prefer chicken cuts, and (iii) those who have lower incomes, higher education and larger household sizes.

Conclusion

Most Senegalese have a positive perception towards domestic chicken meat and have exhibited a preference for it.

- Policies and investments could aim at improving processing and packaging. This will enhance the hygienic conditions and safety in the value chain, ensuring the protection of consumers from food-borne illnesses.
- Public awareness campaigns could be organized for example by the government and the consumer protection association to educate consumers on the indicators of contaminated meat and the health risks associated with consuming chicken left unrefrigerated for several hours.
- The Government could ensure low consumer prices. This may be achieved, for example, by reducing production costs through local alternative feeds.

Further Information

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