

**EXPORT MARKETING OPPORTUNITIES  
FOR CHADIAN PEANUTS**

by

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## **EXECUTIVE SUMMARY**

Chad is a country of 6 million people, at least 73% of whom reside in rural areas spread over a vast area and must rely upon agricultural resources for what little income they can generate. It is a net importer of goods and services because it has few other resources and a very low per capita income level.

Yet it has remarkably good and productive land, amazingly good water resources, over 400,000 small yet obviously skilled farmers, and some very capable people providing support services, with the very limited economic resources available to them.

In reviewing the information available relative to the agricultural market, and peanuts in particular, interviewing government and experienced USAID personnel, the scope, magnitude and complexity of the problems inherent in marketing Chadian agricultural products quickly become apparent.

The changes necessary to move Chad substantially forward to a healthier agricultural based economy, while easily identifiable, are for the most part simply unaffordable. Furthermore, any changes being attempted face what seem to be almost insurmountable obstacles in the infrastructure and bureaucracy.

USAID has been a major catalyst in identifying the need for change, and executing and funding projects to help make the needed changes a reality. Regretfully, this valuable contribution will be discontinued before the end of 1994.

It is within this very difficult context this report develops a series of recommendations, both directional and need specific, many or all of which require a firm commitment on the part of the Chadian authorities and traders. Difficult as they will be to implement, they are based on fundamental marketing theory and principles which have proved successful throughout the world. Thus it is believed the necessary commitment and effort is warranted in order to generate for the economy the increased income for which there is clearly potential.

To express the goals for success simply, as a first step Chad needs to produce and market peanuts rather better and more effectively than all the other competing producing companies within the region.

When this step has been taken, Chad will be in a significantly stronger position to broaden its export market horizons and compete in the more valuable world markets. That step is

perceived to be a much longer term goal but one which is fully achievable if the first step is fully and successfully completed.

To achieve the initial objectives, a clear recognition of the needs of each sector of the industry and, even more critical, of the final export consumer is required. Only then do the strategies for successful implementation of a plan become apparent.

The needs of the individual industry segments may be summarized as follows:

Consumers (export)	Satisfaction of their needs in the best way affordable
Government	Revenue to help grow the total economy and fund support services.
Growers	Subsistence support Revenue/improved cash flow generation
Traders	Revenue to help grow their business'

Key individuals and companies involved in the peanut industry throughout the world recognize that peanuts are fundamentally an agricultural commodity. If left alone to be produced and sold to their consumers, without interference, they would be handled at all stages in the same way that any other commodity is handled, strictly on a price (the lowest) basis. As the industry segments attempted to add value to their commodity, there was a clear recognition that the way to do this was to differentiate their product from those of other regions/origins and make modifications to the product and handling process' to more effectively meet the needs of their target consumers.

In the case of those involved in Chadian peanuts at all levels, there needs to be a recognition developed of that process and serious efforts made to follow it. The clear goal of Chad should be:

To be the primary supplier of carefully produced peanuts, reliably consistent in terms of supply, type and quality standards, to satisfy the consumers' needs (as they may be defined) in countries throughout the region.

If the authorities and industry participants in Chad can

recognize and understand this concept and be even reasonably successful in achieving the goal, the reputation of Chad as a peanut supplier to export markets will be greatly enhanced and, even more important, Chad will stand apart from all the regional producing countries competing in the same market. Thus, the demand for Chadian peanuts will develop at a faster, higher value rate than in the other producing countries. The benefits will 'ripple' through the industry segments to the benefit of the Chadian peanut growers and government revenues.

The difficulty is that the types of changes which must be made in order to be successful in expanding exports over the longer term, and increasing revenues from them, although not substantive by comparison with the needs in other sectors, still require the injection of some level of funding (to say nothing of substantial interest and effort) which, under the circumstances in Chad, is not readily and fully available.

Nevertheless, this report, while making sure all recommendations made are practical and may be affordable, at least in part, restricts itself to making suggestions while attempting to fully recognize the inherent difficulties of the economic and political situation in the country.

An accurate cost benefit analysis is fully warranted in order to help rationalize the need and help to get government to support it. Again, though, and as with many Chadian needs, this will be difficult to produce properly because of the weakness' in the statistics available. Reliable statistics are, of course, essential in preparing effective developmental plans

## **PROJECT OBJECTIVES - Peanut Export Marketing Phase**

1. Identify benefits and constraints of peanut growing in Chad with respect to the potential for the commodity in export markets.
2. Identify market opportunities for Chadian peanuts.
3. Identify and prioritise improvements required to facilitate export movement from fields, through Chad to export border crossing points. Differentiate between medium and long term strategies.
4. Identify local interviews with trading individuals, export marketing related perceptions of Chadian peanuts vis-à-vis peanuts of other origins serving the primary markets.

## **METHODOLOGY**

Because so much work of a more general nature has already been undertaken, and the inevitable time constraints, reliance was very heavily placed on this material to provide the necessary background. Of particular value was the extensive Overview Study of Chad Agricultural products recently completed by Social Consultants International, Inc (SCI), along with important input from the other team members, experienced in the market and who were contributors to, or the author of the Overview Study.

Background research was undertaken in advance with industry and university resources in the United States and Europe.

Interviews were held with senior members of the Chadian departments of Agriculture/Environment, Statistics, and Rural Development along with data contained in publications published by them.

Interviews were also held with traders in the market in N'Djamena and, by telephone, in Senegal, and by telephone with dealers in the United Kingdom. A visit to the closest border crossing point in to Cameroun, along with observations made in and around N'Djamena, more than served to confirm just how severe some of the distribution difficulties are.

## BACKGROUND

### WORLD / AFRICA PEANUT MARKET OVERVIEW<sup>1</sup> (1980's vs. 1970's - Average year in each decade)

Table I

World production in the eighties grew by +17%, largely due to yield improvements.

Worldwide, peanut exports increased during the comparative period. On the other hand, Africa, and west Africa in particular, suffered serious declines of -62% and -67% respectively. These declines were largely attributable to declines in crushing demand and competition, both with quality and supply, from other regions, particularly south America, east and southeast Asia.

The world importance of crushing dropped to 53% from 57%, due to substantial growth in canola and sunflower production, oils which are now considered healthier and less expensive in consumer markets in the major developed countries. Peanut oil has now evolved into an oil with very specialized benefits and uses in these particular markets. A similar worldwide decline in the demand for other tropical oils is also being experienced.

Food use of peanuts generally throughout the world increased in importance to 36% from 31%.

Comparing trends for the African regions with those of the world at large, there are indications of significant differences in the situation. The region had a general drop in production of -18% with the smallest decline occurring in West Africa -4% (vs. world increase of +17%).

The effect of these changes resulted in the African share of world production dropping from 27% to 19%

Contributing to the decline were a major drop in hectares planted (-14%) and a reduction in yields. Again West Africa suffered the least loss in hectares planted and actually showed a small increase in yield

Understandably because of its importance, West Africa suffered the second largest regional decline in crushing (-15%) and was, most affected in the changing consumer preferences for oil.

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<sup>1</sup> WORLD PEANUT PROFILE - University of Georgia, U.S.A., 1993

African domestic utilization for peanuts as a food/protein source showed a substantial increase, with West Africa showing the largest increase at +25%.

In summary there was a significant shift between average years in the seventies and eighties in terms of regional importance and in the production of peanut oil. The two are obviously related and, historically, as a major producer of peanut oil and meal, Africa was naturally seriously adversely affected by these environmental changes. West Africa appeared to adjust most effectively with growth both in yields and the quantity of peanuts utilized for domestic food use.

### **Per Capita Consumption**

Consumption levels of peanuts and peanut products in the developed markets of North America are approximately 2.5kg. About half that is in the form of peanut butter. In the EU consumption is approximately two thirds of the North American levels due to much lower peanut butter and peanut oil usage.

The lack of good statistics for the West Africa area make it impossible to generate per capita consumption figures for the region. However, because of the vastly different use patterns and importance of the product, it is reasonable to assume they would reflect substantially higher consumption.

## WORLD PEANUT PRODUCTION METHODS

Peanuts are produced worldwide but in each area there are one of two primary reasons for production, for local sustenance or for supplying consumption needs in developed consumer markets. In both cases the production is geared to fulfill the different consumer needs. The circumstances and methods used in the different situations are quite different.

Many countries produce peanuts, often in very large quantities, primarily to provide their own people with oil for cooking and an inexpensive, readily available source of protein. Oil production is very important for this purpose and can account for as much as 75%, or higher, of peanut usage. As part of that production, traditionally many of these countries were also major oil exporters on to the world markets. (However, as previously noted, changing consumer attitudes and needs are being reflected in significant reductions in the importance of this production sector, at least over the last decade). Two of the largest producing countries in the world, India and China, fall into this category, where the primary disposition is for local consumption. The proportion of production they export on to world markets is relatively small yet China, at least, is still considered a major exporter.

Other countries, although less important in terms of total production quantities, produce peanuts primarily for a developed, more valuable and very different consumer market. Producing countries which fall into this category include the United States, Argentina and (historically at least,) South Africa, though important disposition in the latter two countries does include simple provision of a locally available low cost protein source. This, though is secondary to the primary usage in, at least, Argentina. Oil production tends to be much less important in these countries but is, of course, suffering from the same declining usage pressures. The end use for the peanut products in these situations is primarily for further processed peanuts for sales as consumer packs for snacking and, in the case of a few countries where the category is mature or developing, for peanut butter. In mature peanut butter markets (U.S.A/Canada and, including use as a cooking ingredient, the Netherlands) peanut butter is an even more important (and is largely a more stable market segment) end use than snacking.

Inevitably, the market demands and the value of the crop are very different for peanuts between the two groups of producing countries. So too, generally, is the degree of sophistication to which the peanuts are subjected during the course of

production and distribution. This, of course, results in very different costs of production and distribution and accounts for the different values applied to the end products.

The larger peanut producing areas of the world which are also active in supplying developed domestic markets and participating in the export market, have the ability to, in effect, produce peanuts to satisfy the different needs of two distinctively different markets. Their ability to compete on all points is directly proportional to how ideal their production methods are. The same must be true for peanut production in Chad. It is essential the differences be fully understood.

#### PRODUCTION PRIMARILY FOR DEVELOPED CONSUMER MARKETS

In the ideal production situation where peanuts are being produced for the higher value markets, the following summarizes the production and distribution needs and infrastructure requirements:

The availability of an effective extension service and research support for every phase of production and distribution.

Generally somewhat, (often considerably) larger sized production units.

Carefully developed, selected, and stored high quality seed.

Fertilizers, pesticides and insecticides necessary to assist and deal with local growing situations.

Ideally, an effective irrigation system to compensate for adverse growing conditions, reduce stress etc.

Careful monitoring of the crop development throughout the growing period.

Suitable and reliable harvesting periods and the predictable ability to reduce the moisture levels in the fields.

A local, centrally located shelling plant where moisture levels can be brought down to lower and carefully measured levels, product is stored, tested, shelled, de-stoned/de-twiggged, cleaned, and sorted, and where grading takes place. The economies of scale very much come into play here and are necessary in order to warrant the capital

investment and production efficiencies.

With increasing frequency, the provision of bulk handling facilities.

Effective quality assurance systems at all stages of growth and handling to ensure grade and product integrity and minimize any kind of product contamination.

Warehousing facilities, preferably (but not in many regions) refrigerated in order to help maintain all aspects of product integrity, and to provide the ability to permit large quantity shipping loads (of consistent quality) of different types and grades to be assembled.

Direct Access to good transportation systems to get the products to either the domestic or an overseas market.

Ready access to commercial crushing facilities to handle oil stock and produce oil uncontaminated with aflatoxin.

Careful and accurate statistical monitoring at all stages of the production/storage phases.

Many short cuts are possible within the production/ distribution needs listed and can be necessary, depending on local circumstances. They may well serve to reduce production costs. At the same time, they invariably dilute the potential for completely fulfilling the consumer (or buyer) needs and thus affect the ability to adequately serve the market. Inevitably, such cuts will have an adverse effect on sales value.

#### PRODUCTION METHODS FOR SUPPLYING UNDEVELOPED CONSUMER MARKETS

The production methods outlined here would be fairly typical of those encountered in similar growing countries, including Chad, which produce, essentially, for the local/regional market only. Production methods in such countries would vary by degree only. For instance, there may be relatively better developmental support, mechanization, seed availability, cultivating methods and/or primary (in local terms) processing. They are all influenced by the need to increase employment and the very low labor rates. However, apart from the larger producing countries which often serve both markets, it is understandably a much less developed and much different production situation which, nevertheless, reflects and largely meets the very different market needs.

To try to combine the two different production scenarios to any great extent, requires a long term commitment on all fronts and, inevitably a significant injection of capital. One of the many difficulties faced in doing this is that with the very small (but numerically large) farm production units there is little need for long term commitment by the farmer to the crop and it is relatively easy in any given year to switch to immediately more profitable crops. The major commitment of support with direction and infrastructure, therefore, has to be made by necessarily reasonably stable governments with a clear, long term and executable plan in hand.

Production methods in these situations are much less sophisticated. Virtually no mechanization is either used or needed. All stages of land preparation, planting, tilling, harvesting and shelling/cleaning etc. are done manually and, in some instances, with very rudimentary equipment. This fits in with need to use readily available labor and the fact that individual growing units are very small.

Although considerably less emphasis is placed on yields and improvements in growing, there is a strong need for an effective extension service support, particularly to advise on protection of the soil, crop rotation plans, helping to minimize various types of common plant diseases, insect and fungus infestation etc. Such assistance may be there but often at unacceptably low levels. This appears to be the case in Chad where the primary focus of extension services is still on the important cotton crop. Yet there is a great deal of cultivar information from sound research in the region undertaken over many years and a need to communicate this information on a much wider scale if improvements in yields, soil and grower interest are to occur.

## PEANUT PRODUCTION IN CHAD

Tables II, IIa, III

### CHAD - Statistics

Table II includes basic population statistics from the latest census, a history of peanut production (1988-1993) and an estimate of the total farmer and peanut grower count in Chad.

### THE GROWING REGIONS

Tables II/IIa

Growing occurs in two groups of prefectures. By far the most important area, comprising 78% of production, is fairly concentrated and located in the southern zone (SOUDANIAN). The secondary growing area (SAHELIAN), with 22% of production, is a widely scattered group of prefectures right across the center portion of the country. Although figures for intermediary years are incomplete, a review of available figures comparing the 1993 crop with 1988 point to the following trends:

1. Both regions have seen substantial increases in plantings, higher yields and, thus, production. It should be cautioned, however, that the significant yield increase suggested by ONDR figures may only be a factor of a better growing year. Longer term trend figures on yields in Chad<sup>2</sup> suggest marginal improvements at best.
2. The increases are likely the result of a generally declining interest in the important cotton crop (representing the largest single export value of an Chadian agricultural commodity) and the acceptance of peanut production as a viable alternative, enabling growers to obtain payment more quickly and able to identify markets for their product with (relatively) fewer difficulties.

### SOUDANIAN

Undoubtedly because of a greater incidence of farming generally, better growing conditions and their proximity to and demand created by the traditional export markets, the five peanut production prefectures of this region account for 80% of Chadian production (relatively unchanged during the strong growth in the

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<sup>2</sup> See Table III

latest five years). Although no export figures are available to support this, it is likely that this region has an even greater share of the export tonnage.

It is interesting to note that yields in this region, which generally provide some guide to growing abilities, are only marginally (perhaps 1-2%) above those of the northern region.

#### SAHELIAN

With the possible exception of Chari Baguirimi, plantings and production in individual prefectures spread across the south central part of the country are at very much lower levels and little sub-regional concentration is evident. There may be sociological, economic, cultural or even political reasons for this. Without good statistics within the area on grower unit sizes, numbers of growers, disappearance segment sizes and trends etc., it is difficult to fully understand the dynamics of and identify the growth opportunities for peanuts in either region, based on production factors.

## Production/Development

Based on 1993 ONDR/DSA<sup>3</sup> production/farmer count estimates, the average hectares planted by each of the 311,000 peanut growers in Chad is 0.9Ha. (Table II).

Peanut production makes a very valuable contribution to the viability of the Chadian subsistence farmer not only by providing an important food source for his family and neighbors, but also providing him with a readily marketable cash crop, providing the family with an income source to purchase other vital needs. Evidence also suggests that women are able to play a more active role in the venture by often being involved in the selling of their production and generating income for family needs.

An agricultural extension service does exist and assists the much more economically important farmers with their cotton growing efforts. In spite of policies which purport to encourage the growth of peanuts as an alternative and potentially more valuable crop, the assistance they provide to peanut farmers appears to be at a far lower level. Nevertheless, interviews with MEA officials provide encouragement that a significant amount of help is being given and research work is important to them. The research station at Gassi, which undertakes projects on many different crops, is apparently doing worthwhile developmental work on cultivar types and crop rotation practices. The question of how many peanut growers are benefitting from this, and by how much, is not known.

It is encouraging to note that Chad is a participant in the ICRISAT<sup>4</sup> and CRSP<sup>5</sup> research network sponsored by many of the world's leading agricultural and development units, organizations and countries. Some cultivar research is also carried out at the Gassi station near to N'Djamena (working with these research

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<sup>3</sup> ONDR - Office National de Développement Rural  
MEA - Ministère d'Agriculteurs et l'Environnement

<sup>4</sup> ICRISAT - International Crops Research Institute for the Semi-Tropics, Patancheru, Andhra Pradesh, India 502 324, India.  
ICRISAT Sahelian Centre, Niamey, Niger, 1991 Groundnut Meeting.

<sup>5</sup> CRSP - The Peanut Collaborative Research Support Program, University of Georgia, Griffin, Georgia 30223-1797, U.S.A.  
Supported by a grant from United States International Development Agency (DAN-4048-G-00-0041-00) and the participation of Alabama A & M University, University of Georgia, Texas A & M University, North Carolina State University, which collaborate with institutions in West Africa, Southeast Asia and the Caribbean.

groups) but it is likely that valuable as the work may be to the future healthy, long term growth of the Chadian peanut industry, it is grossly underfunded and suffers from the same infrastructural, economic and political problems experienced elsewhere.

## The Products

Peanuts grown in Chad include the smaller Spanish, type preferred for oil extraction (crushing, with feed stock as a by-product), and which are more commonly grown in the Sahelian region, an area to which they are more suited. The other types are of the larger Virginia/Runner varieties used for food. Most of these are used as kernels, though about 10% are left in the shell, also for edible use and to a much lesser extent in the export market.

## Crushing

This is the term used to describe the extraction of oil from peanuts, with animal/poultry feed as a by-product. Although in underdeveloped countries peanut oil has great value as a cooking medium, with feed stock providing residual value as an important by-product, it also provides a low-cost source of protein. However from the purely commercial export point of view, this segment has the least, and a declining potential for adding value to the growers' crop. It also has significant phytosanitary problems which, in many cases, appear to be being ignored. Again, interviews with MAE officials suggested that they believe use of contaminated feed stock is not a problem.

In developed, producing countries, crushing stock is derived from the lower grades of peanuts, culls, surpluses and peanuts otherwise known to be contaminated with the aspergillus flavus fungus which is responsible for the presence of the powerful carcinogen, aflatoxin. The commercial crushing process eliminates this contamination in the oil generated and in the by-product.

In lesser developed countries, the seed crushing is undertaken in very small batches by individuals closely connected with peanut growing. The hand method they use does little or nothing to eliminate aflatoxin contamination from the oil. In recent years much research work on this has been undertaken<sup>6</sup> in West Africa and has identified a type of clay which, if used in the process, has the ability to absorb the contaminant. Thus this work may well help to reduce the health threat to indigenous peoples and their livestock and poultry who can be fed contaminated feed produced as a byproduct.

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<sup>6</sup> ICRISAT / CRSP -see footnote 5

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## Edible Use

After undergoing rudimentary shelling, cleaning and some sorting at the farm level, the product being sold is transported for sale to a nearby market or more concentrated center of population. Transportation difficulties preclude the likelihood of the grower venturing too far with his/her product. There, it is either sold directly to local 'sales outlets' or, more frequently perhaps, to local traders who act as wholesalers/dealers and to brokers who have an important role in assembling batches from growers to meet the stated needs of local traders.

## Distribution

The specific trade channels into which Chadian peanuts are diverted have been estimated<sup>7</sup> as follows:

Subsistence consumption*	20%
Domestic Consumption	40%
Export	10%
Others (seed/stock/losses etc.)	30%

\* presumably by the grower and in the immediate growing area

However, when these estimates are used without adjustment on three crop years during which production more than doubled, it suggested complete and equal elasticity in demand in all three channels which is probably an unrealistic scenario.

On the other hand, speculatively, the effect of heavily increased production would influence market prices adversely. Although good market price history for peanuts is not available for the growth years, indications are<sup>8</sup> that this was the case. At the same time, with little change in the Chadian economy or the availability of disposable income, it is unlikely domestic consumption would have increased substantially over this period and it is more likely the export market was the channel to gain most benefit from the substantially higher volume available.

This is an important issue and key to planning for growth of the Chadian peanut industry. The assumption is made, therefore, that within reason, significant increases can and must be absorbed primarily in the export market. Although prices may suffer, and because any competitive advantage Chad may have diminished proportionately to the distance they have to travel to reach their consumption market, nevertheless the surrounding countries offer large and expandable opportunities.

The SCI Overview report clearly outlined the problems and costs associated with moving the product to market. The enormous weakness' apparent in the total transportation and warehousing

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<sup>7</sup> Social Consultants International, Overview Study of Chad Agricultural Products; February 1994; USAID contract #677-0/69

<sup>8</sup> Overview Study-SCI

infrastructure makes distribution costs a major component in the total cost of doing business.

A critical part of the distribution chain are the individuals involved in locating the farmers production and moving it through the various channels to the final consumer.

In Chad, and throughout the region there is a long tradition of grain trading amongst certain groups and/or families. Although not all the trade is in their hands, these groups are the most important and appear to be generally well placed to expand their peanut export business. They frequently have good connections in the other countries in the presence of other family or group members. A weakness in the system, however, is that with frequently fluctuating prices (even by week or day, caused by normal supply and demand pressures), there is a need for much more warehousing space to be available, and access to capital, required to fund inventory accumulation. Provision of these may help considerably in evening out prices and enable traders to take more advantage of higher prices, to the benefit of the Chadian economy. Theoretically the grower should also receive some measure of benefit from this. Such a change would, however, mark an important step in development maturity for the Chadian peanut industry.

#### **Taxes and Duties**

Again the SCI report deals with this significant cost. The report estimated the total cost could run as high as 40% of the market prices.

Philosophically abhorrent as the tax on exports must be to those aware of the need to encourage exports in every way possible, there must be a recognition of the very limited means available to the government to generate revenue in an economy such as that to be found in Chad. As the Overview Report properly pointed out, there must be a more appropriate balance between the two needs. Recent reports from SCI team members indicate that there has been a softening of the government position on this and the levels imposed have been reduced. The same reports suggest that, predictably, tax avoidance has dropped, more true export volumes are being declared and government revenues from this source may have actually risen.

### **Quality Standards / Assurance**

There is undoubtedly an awareness amongst government personnel of the potential phytosanitary problems which exist. There is no evidence that any formal grade standards exist or are applied to the product. At this stage of development it is unlikely they are needed in the domestic and export market places.

Although there is certainly a strong awareness on the part of the authorities, there does not appear to be any particular interest in, or routine testing for aflatoxin. In the stage of development of the industry in Chad, it would appear pointless to invoke such standards or testing without having the resources available to help growers understand and conform to them. However if a clear and meaningful commitment of support for the industry was enunciated by the authorities, this area would need to be addressed rather quickly in order to set quality targets that are achievable.

### **Competition - From Other Crops / Origins**

Competing for the growers' attention and resources are a variety of other crops. His needs are determined by what success/problems he achieves, in his terms, with the various crops he has the ability and land to grow.

Cotton, by far the largest export crop, is grown under similar conditions to peanuts. Declining returns and problematical state ownership, and thus control of the distribution channels, has created cash flow problems for many cotton growers. Hence, many have switched to peanuts. Market prices may improve and, just as easily, effectively encourage growers to return to cotton at the expense of peanut production.

The success of Chadian peanuts in export markets must be heavily influenced by competition from other origins serving the same markets (Table III).

## **Consumer Needs in Export Markets**

Consumption within the region is primarily for use as a cooking ingredient in meal preparation. A very much secondary food use is for snacking. Consumers also purchase peanuts for home crushing to produce oil, also for cooking.

The larger kernels (Runner/Virginia type) are more acceptable for food use with the smaller (Spanish type) being preferred for their oil content.

Critical to the development and execution of effective growth strategies is the necessity to understand as precisely as possible just what these needs are and how the consumer (both within the distribution network and the final consumer) make their value judgement.

Observations and discussion with buyers appear to confirm that this judgement is made on the basis of:

Type (variety decided effectively on kernel size)

Visual Appearance ( consistency, color, lack of blemishes etc.; general acceptability, free of foreign material)

As no grading or monitoring exists (or is likely practical in the foreseeable future) and no identification association with any grower, village, prefecture or even, perhaps, country is carried forward through the distribution chain, these factors will continue to be foremost.

In discussions on prices, it was not clear what the impact was of different values being applied to these factors. Nevertheless it is reasonable to assume a buyer preference will exist and will likely, at least marginally, affect the price the trader or consumer is willing to pay within the context of the current price range.

In order to develop, if possible, a unique product positioning for Chadian peanuts, it is essential to assess the present and hopefully different perceptions of export buyers/consumers for the different origins and identify what changes are necessary for Chad to build on such an opportunity.

A small survey of a sample of buyers active within the export market has been undertaken (Table VII) in an attempt to provide some degree of quantification of this and identify factors which may need to be investigated further. Larger scale, more structured and widely distributed research may be warranted when these results are tabulated.

## EXPORT MARKETING

### Potential Markets - Definition / Prioritisation

Tables IV, V, VI

In assessing market potential, recognition is given to the lack of availability of any accurate standard required statistics to be able to generate clear focus. Consequently, certain key assumptions in connection with this have been made:

1. Usage habits and consumer awareness and attitudes towards the category do not vary to any great extent within the markets identified.
2. Economic standards and available disposable incomes will show little variation.
3. Distribution difficulties and the high costs associated with them will be fairly consistent throughout the region. However the availability of some rail transportation would proportionately reduce costs to the more distant markets where it is usable.
4. Per capita consumption will not vary substantially by country.
5. Product standards, or the absence thereof, and phyto-sanitary regulations are equal throughout the region.

It is also recognized that these are fairly significant assumptions being made. However, it is important they are clearly defined and it is probably impossible to replace them with accurate quantified data at this time.

The remaining factors considered in selecting and prioritising potential export markets for Chadian peanuts are:

Population      Given the key assumptions, this factor becomes a key influencing factor. In any given country, although the total is important, because of the importance of distribution, so are the levels of concentration and the proximity of them to Chad, particularly the southern production zone.

Distribution Factors related to this include all phases of transportation, taxes and other payments, costs of delays and difficulties of ensuring return loads etc.

Production High levels of production in an export country will make it more difficult for Chad to penetrate the market

Trading Ties Obviously where there are good, historical and existing trading patterns and the products are accepted, this becomes an important factor, particularly in achieving short term gains

Some market characteristics are summarized in Tables IV and V. Subjective factors considered are summarized and included in Table VI.

As a result of this analysis, following are the prioritized markets for Chadian peanuts in the short and longer term:

**PRIMARY**

Cameroun  
Central African Republic  
Nigeria  
Congo

**SECONDARY**

Niger  
Gabon  
Equatorial Guinea

**Tertiary**

Soudan  
Zaire  
North and Western Africa

## Discussion - Primary Markets

The key difference to current direction is the inclusion of Nigeria as the third most important market. In terms of population, (size/concentration/distribution), the proximity to a railhead and because of a quite low (and declining) trend in domestic peanut production, Nigeria warrants and needs a substantial amount of effort in order to develop it. It would appear to have the potential to become the most important market. MAE officials interviewed point out that it is a very good market for Chadian beef, which suggest identified trading difficulties are not insurmountable. On the other hand they suggest it is very much a (low) price market for peanuts and not of much interest to them. Further research could possibly enable some niche type marketing opportunities to be identified with a market such as this.

Congo has been included because historically it has had importance to Chad, along with no identified domestic production.

## Secondary Markets

In this group are the smaller, more distant UDEAC countries with no domestic production identified. However, like Congo and because of their location, they are more likely to be subject to competition from Zaire.

## Tertiary Markets

Zaire and Sudan are included because of their population factors. High domestic production and distance reduce interest in Zaire and a multitude of problems, including transportation access, negate the value of Sudan. Similarly, a lack of transportation channels largely eliminate the very substantial North African population from the list of potential markets.

## Export Volume Projections

Determining what level of exports may be achieved is critical to the generation of a value which may be expected to be added to the economy and for planning purposes, particularly in justifying the capital and rationalising that the infrastructure requirements are in place to support the projected volume.

Unfortunately, in this case, no reasonably meaningful method of making such projections for Chad has been identified. There are fundamental problems:

1. No even unreasonable export volume data exists.
2. No per capita consumption estimates have been identified which would, at least when applied to available production figures, provide a fair indication of the disappearance in to the export market.

Add to this the fact that historical production figures indicate unusually heavy swings in production levels (+47%/yr. for three years followed by a range of +2% to -15%/yr. over the most recent three years,) and the problem in making projections is magnified.

Nevertheless, a projection is included with the caveat that careful consideration of the key assumptions is warranted. The same assumptions also suggest future projects which authorities (or other agencies) need to undertake to ensure more effective planning work is possible.

## Key Assumptions

Source

1. Population growth of +2% DSA estimate
2. The accuracy of recent historical production reports (ONDR/MAB) and annual growth projected, conservatively, at +2%
3. Kernel basis yield from farmers stock estimated at 75%
4. Projected average production growth based on current investment/infrastructure conditions
5. Per capita domestic consumption (all uses) of 10 Kg. This compares with a developed country level and different usage patten of (approximately) 2.5 Kg. and assumes four times that level in an undeveloped country.

### PROJECTIONS of Export Volume Disappearance (1994-1998)

	Population ('000's)	Production ('000/MT)	Kernels ('000/MT)	Per Cap Cons. (domestic/Kg)	Domestic Disap. ('000 Kg)	Export Disap. ('000 Kg)
1993 (base)	6,288	190	143	10	62,880	78,620
1994	6,414	194	146	10	64,140	81,860
1995	6,542	198	149	10	65,420	83,580
1996	6,673	202	152	10	66,730	85,270
1997	6,806	206	155	10	68,060	86,940
1998	6,942	210	158	10	69,420	88,600

It should be pointed out that with a flat per capita consumption, if production increases of the magnitude experienced over the last 5 years were projected, substantially larger projections for export volume would appear. These would have very significant positive implications for the economy and for the infrastructure changes necessitated. A similar impact would be felt if, for example, government efforts to increase yields were successful.

### III ISSUES / RECOMMENDATIONS

The issues and recommendations are presented by industry segment, to assist in giving separate consideration to the largely differing needs of each segment. Some issues, however, are obviously issues involving more than one segment.

#### ISSUES / RECOMMENDATIONS

##### Government - Issues

General revenue generation is extremely difficult.

There is little or no revenue available to support changes in infrastructure (Extensions services/Improved distribution/Controlling customs/research/statistics).

##### Recommendations

1. A carefully thought out new agricultural development plan should be initiated, and reviewed and revised annually, to provide clear direction to the agricultural industry, while taking full cognizance of the influencing factors and support available.

Included in the plan would be a clear statement of policies, particularly with respect to the and of the key crops which should receive support in order provide long term revenue growth within the Chadian economy. It is believed that peanuts offer significant opportunities for, and benefits from growth in export markets.

The policy should be effectively communicated, particularly to the Chadian farming community in order to provide them with direction in their crop planning and encouragement from the government support committed. Recognition must be given to the farmers needs for longer term planning, so necessary in crop rotation (to protect and improve land) and to assist in purchase decisions for land/equipment improvement etc.

2. Production goals should be established, both short and long term, strategies developed and executed to ensure their achievement, and monitoring undertaken annually to ensure goals are being met.

Implicit to the need for this formal planning process is the availability of at least the basic, reasonably accurate statistics necessary to provide essential input for the planning process. Much of the work undertaken by USAID in this area is making a worthy start in providing part of these needs. However additional funding is necessitated to support and expand the work currently being undertaken by the Department of Agricultural Statistics. This funding may be generated, at least in part, by reviewing the work they are currently doing and re-focusing their efforts on current needs and the particular priority direction stated in the Government's growth policy statement.

3. A re-focusing and strengthening of the Extension services and Research support to complement the government agricultural policy.

Some effective work is already being undertaken in both these areas. However, with improved direction on specified primary products and necessary additional funding, they can make a much more significant contribution in ensuring production goals are met. In fact, their contribution in the Chadian situation is critical. While it is encouraging to know they are participants in ICRSAT and CRSP programs, by taking a more aggressive stance, backed up by government support, it is believed Chad could benefit to a much greater extent from the developmental programs, which are funded by a very widely based group of agencies and countries.

4. Initiate meaningful efforts to have a more effective harmonization of trade issues with other UDEAC countries, thus reducing border delays, excessive export costs and simplification of logistics.
5. Add peanuts to the SIM reporting in order to broaden interest at all levels by the industry in the products. This should also help to increase the awareness of the importance and value of the crop amongst current and potential growers.

These are the primary and, it is believed, essential steps which must be undertaken by the authorities to assist in showing the fastest possible increase in revenues from growth in peanut exports. There are other, perhaps longer term, changes which are needed and were clearly identified in the Overview Study earlier this year. They included:

6. A major reduction in export taxes, duties etc. in order to return the economy from its current position, operating underground.
7. Returning to formal control of the customs service to ensure proper receipt of revenues and to enable accurate export records to be kept.

For the much longer term, due to the practical needs and costs and, in some cases, because further information and data is needed, the following are included as likely necessary:

#### Longer Term

8. The development and introduction of product standards for peanuts, based on fulfilling consumer needs and encouraging improvements in quality and production.
9. Introducing standard and smaller bag sizes to avoid the problems of recording data from the current mix (reported to vary between 80 and 100Kg) and, obviously, for much greater ease of handling.
10. Introducing some form of regulated identification at source, to include grade, variety and growing region origin, at least on peanuts for the export market.
11. Introduce aflatoxin testing close to the point of origin and certification for export stock.

Aflatoxin contamination poses a significant health threat to consumers, particularly in countries such as Chad where high consumption levels of peanuts and peanut oil are common. Regrettably little or no detoxification of them takes place because, again, the infrastructure is not in place and funds are not allocated to this issue.

### **Growers - Issues**

Insufficient family revenue to provide the basics of life and to enable farming capital and expense needs to be met.

Competition in peanut farming from other crops.

A lack of strong direction and support from authorities.

In the Chadian situation, the recommendations to deal with these issues are those noted above and are addressed to the authorities, who must provide the leadership and communicate the knowledge needed to strengthen the economic position of the farmer.

### **Traders - Issues**

Recognition of the importance of their position as primary catalysts in filling the demand and growing the industry.

Deficiencies in fulfillment of their infrastructure and finance needs.

No reliability of quantity or quality of supply.

### **Recommendations**

12. Fund, and/or create some form of central warehousing at strategically important distribution points where farmers stock kernels can be stored short term, to maximize market prices and assemble loads to enable more economical export distribution can be undertaken.

In the first instance this could probably be achieved by starting at one point, perhaps Sarh, providing encouragement for buyer groups in an individual buying center to meet together for a seminar(s). A key part of the strategy at such a seminar would be to encourage them to recognize that in the export markets, they should focus their efforts on their primary competitors within the export markets who are the traders of other origins. They should be discouraged from aggressive trade fighting with other traders of Chadian peanuts, in the traditional way.

13. Traders, as a group in a given area, develop and execute plans to establish communal warehousing.

They should be encouraged to work together to establish communal storage areas/buildings and look ahead to the value of establishing cleaning, grading, sorting facilities on behalf of the supplying growers, and in order to ensure better, more consistent quality products are available for the export markets.

14. The same groups should be encouraged to identify the constraints they experience in developing and expanding their peanut export business and develop communal solutions to solve them.

Examples of this could be the shortage or lack of access to short term capital to finance inventories and lower their distribution costs. They should be encouraged to appreciate the benefits of working as a group with Banks and Government to find solutions to these problems.

#### **Consumers - Issues**

Their importance is not recognized and catered to.

Specific selection criteria is unknown.

#### **Recommendations**

15. Undertake a properly constructed, but small research project to identify the consumer and trader perceptions, attitudes and consumer habits with peanuts of different origins (including Chadian) in primary export markets.

The objective of the program would be to fully understand consumer needs and to enable the identification of advantageous positioning for the long term development and sale of Chadian peanuts.

The research should be undertaken in at least one key center in each primary export market, using the more important buying groups who deal in peanuts of more than one origin and a few typical consumers recruited on the basis of their normal use of peanuts in their homes. The consumer groups could be handled in

similar fashion to more sophisticated focus groups. Although the sample groups need not be large they should be representative to provide mostly quantifiable data. Open ended questions should be minimized and the tested questionnaire may well provide primary input in questionnaire design.

#### IV. ALTERNATIVE CONCEPTS

Other options were considered and determined to be for consideration at a much later development stage. They included:

- Identification of niche marketing opportunities.

One such option may be to determine the possibility of growing in-shell peanuts which would be superior from a flavor point of view, and visually superior through the selection and use of cultivars which produce light skinned, extra large jumbo peanuts which could be cleaned and further sorted to supply specialty distributors in distant developed markets. They would be sold at a substantial premium to world market prices.

The particular requirements are not available at this time. They would be necessitate the availability and growing potential for such cultivars on a consistent basis and in sufficiently meaningful quantities, strict quality assurance at all stages and the availability of low cost labor be trained for sorting.

- Much greater attention to the creation and regulatory control of grades and standards, to provide strong and positive product differentiation for Chadian peanuts within the region.

Again this would be a costly step to initiate effectively, and there is no indication the market requires it at this point. Long term, however, if Chad is to get into a position of some kind of product superiority and protect its reputation, such a step would be essential.

**ANNEX**

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## TABLES

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III	Peanut Production in Chad
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VI	Export Market Analysis - Qualitative
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reasinistère des Agriculteurs  
Des questions suggères.

94 10 27

Les origins des grains pour les cultivateurs d'arachides. Etes-il essaye le nouveau variétés concevoi, par le recherches, a redut la damage par les insects etc, augment le rendement et ameliorer le saveur des arachides?

Etes-il encourage à rotatif les cultures a empêche dégâts a terre, et augment le rendement?

Quelle cultures utilisez dans le rotatif, et pour combien des ans?

ISSA -

A votre opinion comme vous taux\* le capacité du gouvernement avoir une grand influence avec les cultivateurs des arachides et ameliorera avec les problems suivant:  
(série de 1-5 avec le chiffre 5 est très bon)

Protection de la terre:

Côntrol des insects

Augmentez le rendement

Ameliorer le qualité des arachides

Encourage plus et mieux production

Trouver les mieux -

méthodes de production

méthodes de décortiqués/triez/nettoyer etc.

		Average Year		Change (units)	Change (%)
		80's	70's		
PRODUCTION (1,000/t)	World	19,807	17,005	+ 2,802	+ 17
	EA	682	1,043	-361	-35
	SA	458	780	-322	-41
	WE	2,644	2,762	-118	-4
	Africa	3,785	4,585	-801	-18
HARVESTED (1000/ha)	World	18,371	18,274	+ 97	+ 1
	EA	945	1,145	-211	-18
	SA	802	1,108	-306	-28
	WA	3,643	3,974	-331	-8
	Africa	5,390	6,237	-848	-14
CRUSHING (% importance)	World	54	58	-4	-7
	EA	46	48	-3	-6
	SA	34	37	-3	-8
	WA	44	58	-14	-25
	Africa	43	52	-9	-18
FOOD USE (% importance)	World	36	31	+ 10	+ 25
	EA	48	39	+ 7	+ 13
	SA	57	50	+ 12	+ 35
	WA	44	33	+ 9	+ 25
	Africa	46	37		
EXPORTS (1,000/t)	World	1,164	1,123	+ 41	+ 4
	EA	57	161	-104	-65
	SA	49	94	-45	-48
	WA	63	191	-128	-67
	Africa	169	446	-277	-62

## 1. Population - Chad

Estimated current annual growth level +2%

	Population ( '000's)	%
Rural	4,602	73
Urban	1,328	21
Total Residential	5929	94
Nomadic	359	6
Total Population	6,288	100

Source: DSA, 1993 census

## 2. Peanut Production History

Planted ( '000/ha)	Yield (Kg/ha)		Production (Tonnes-Farmers Stock)	Kernels* (Est yield 75%)	% change (vs. LY)	Notes
150	672	1987	93,810	70,358		
185	586	1990	225,700	169,275	+47	% = Avge of 3 years 1988 & 1989 n/a
226	1,021	1991	230,417	172,813	+2	
275	814	1992	223,763	167,822	-3	
268	709	1993	190,000	142,500	-15	

Source: Production ONDR/DSA  
FS yields SCI

\* Available for all consumption, kernel basis

## 3. Farmer Population in Chad:

Total Number of Farmers 415,000

## 4. Number of Farmers growing peanuts 75%

Total number of peanut growers 311,000 311,000

Source: DSA setimates

## 5. Estimated growing unit size

Hectares planted 268,000

Average growing unit size 0.9 Ha

Source: DSA setimates

PEANUT PRODUCTION IN CHAD - Statistical (1992 crop, % change vs. 1988)

Table III

Zone/Prefecture	Ha	% Chge.	Yield <sup>1</sup>	% Chge.	Production <sup>2</sup>	% Chge	Categ. <sup>3</sup>
<b>SOUDANIAN</b>							
Moyen Chari	50,720	+90	835	+1	42,351	+91	E
Mayo Kebbi	48,300	+39	872	+65	42,118	+129	E
L'Oriental	46,670	+91	767	+28	35,796	+18	E
L'Occidental	37,930	+205	967	+61	36,678	+50	E
Tandjile	29,820	+50	603	-6	17,981	+41	L
<b>ZONE SOUDANIAN</b>	<b>213,240</b>	<b>+72</b>	<b>820</b>	<b>+29</b>	<b>174,924</b>	<b>+121</b>	
% Importance	78				78		
Index-National			101				
<b>SAHELIAN</b>							
Chari Baguirimi	29,230	+296	760	+9	22,215	+247	E
Ouaddi	12,000	+121	1000	+250	12,000	+117	L
Guera	9,200	++	837	+235	7,700	++	L
Salamat	9,000	+48	640	+7	5,760	-58	L
Batha	1,600	+7	600	±0	960	+7	L
Biltine	300	++	600	+100	180	-40	L
Kanem-Lac	16	-85	1500	+50	24	--	L
<b>ZONE SAHARA</b>	<b>61,346</b>	<b>+144</b>	<b>796</b>	<b>+50</b>	<b>48,839</b>	<b>+228</b>	
% Importance	22				22		
Index-National			98				
<b>CHAD</b>	<b>274,276</b>	<b>+84</b>	<b>814</b>	<b>+30</b>	<b>223,763</b>	<b>+139</b>	
% Importance	100				100		
Index-National			100				

Source: DFA/ONDR

NOTE: The above data, including the strong growth trends, may or may not be representative. However, the trends between regions are assumed to be typical, based on figures for one intermediary year (1991) which are available.

<sup>1</sup> Kg/Ha

<sup>2</sup> Tonnes

<sup>3</sup> E - Active Exporting L - Primarily Local Consumption

**PEANUT PRODUCTION/DISAPPEARANCE**

Table IV

UDEAC & Nearby Country Comparisons (1991)

				Disappearance (% of Total Production ignoring exports)		
	Plantings (1,000/Ha)	Yield (T/Ha)	Production (1,000/T)	Food	Crushing	Feed/Seed
Chad	101	.7	80	64	31	5
CAR	130	1.12	145	40	55	5
Cameroun	320	.44	140	72	22	6
Nigeria	750	.53	400	75	15	10
Senegal	900	.77	695	21	63	16
Niger	110	.55	60	70	25	5
Sudan	530	.75	400	40	53	7

Notes: No recorded production for Congo/Equatorial Guinea/Gabon

Disappearance in these figures generally (but not always) includes exports which are not broken out.

Source: World Peanut Profile - University of Georgia, U.S.A.

## Regional Potential Export Market Profiles (including Chad)

Table V

Market		Population ( '000)	Population Pers./Km <sup>2</sup>	Regional Concentratio Π (heavier)*	Peanut Prod'n (Tot.Domest./T)	Food Use per.cap. (Domest.Prod'n/Kg)
Nigeria	1	115,973	125.5	C/N/W	400	2.6
Cameroun	2	11,407	24.5	E/S	140	8.9
Niger	3	7,523	6.3	S/C	60	5.6
Chad	4	5,538	4.3	WC/S	80	9.2
CAR	5	2,813	4.5	E/C	145	20.6
Congo	6	2,245	6.6	C/S	0	
Gabon	7	1,245	4.7	Cst/E	0	
Eq. Guinea	8	343	12.2		0	
Soudan		27,268	10.9	C/WC	400	5.5
Zaire		33,336	14.2		380	11.4

\* N/S/E/W; Cst-Coast: C-Central

Sources: Population Encyclopaedia Universalis - Atlas Statistique 1990  
Peanut Production World Peanut Profile - University of Georgia, U.S.A. 1991 figures

Market Analysis - Qualitative

Table V

	Strengths	Weakness'
Nigeria	Contiguous/Very large population/Very Densely populated/Railhead <250 km/Indust. Consumer Mkt/Low domestic Produced PN. Per Cap.	Language/Cultural differences/Distance from major Chadian PN growing areas/Weak existing Trading infrastructure Chad-Nigeria/Cost of doing business
Cameroun	Contiguous/Railhead <250 km/Large population/Densely Populated/traditional Chadian market	Relatively high domestic production PC/Expensive road distribution
Niger	Contiguous/large population	Transportation/Proximity of consumer markets/Distance from major Chadian growing areas
CAR	Contiguous	Heavy domestic production
Congo	No domestic peanut production/Some history of buying Chadian	Distance from Chad/Proximity to Zaire
Gabon	No domestic peanut production	Distance from Chad
Eq. Guinea	No domestic peanut prduction	Distance from Chad
Soudan	Contiguous/large population	Cultural differences/Problems politically, economically/Transportation
Zaire	Large Population	Distance to Chad/heavy domestic production

Nom de l'enqueteur:

Ville:

Tel:

Marché:

Fx:

1. Votre fonction(s):

Grossiste  Intermediaire  Exportateur  Importateur

D'ou vient-il:

2. Ou vous approvisionnez-vous?

Marché: de Collecte  Hebedomadaire  Urbain

3. Agissez-vous pour votre propre compte: Oui  Non

si non, ou est base le commerçant:

4. Quelle quantité aviez-vous l'habitude de stocker avant d'exporter:

sacs: de Kg

5. Quel était le prix d'un sac (f CFA):

courant: Dimensions du sac (Kg)

Pour l'année dernière, le prix était

le plus haut: (f CFA) quand(mois):

le plus bas: (f CFA) quand(mois):

6. Quelle est la part de marché les arachides que vous exportez?

décortiquée % non décortiquée %

7. Quelles sont les varietés que vous exportez?

	<u>Variétés</u>	Valeur:	<u>Haut</u>	<u>Moyen</u>	<u>Bas</u>
1.			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

8. Etes-vous soumis à des taxes? oui  non

Si oui, lesquelles? Taxes Par rapport à montant de la tax

1.

2.

3.

9. Quelle quantité (en sacs) d'arachide exportez-vous? par mois:  
dans l'année:

10. Vers quelles destinations exportez-vous:

<u>Villes</u>	<u>Pays</u>	<u>Quantités Exp.</u>	<u>%des total</u>
1.			
2.			
3.			

11. Comment vous vous organisez pour exporter votre produit:

Individuellement  Regroupement

Nombre:

Quantité:

12. Du système que vous utilisez, quels sont ses avantages?

13. .... et ses inconvénients?

14. Vos clients viennent de quels pays:

<u>Noms</u>	<u>Pays</u>
1.	
2.	
3.	

15. A quoi leur servent les arachides qu'ils achètent:

consommation  %

transformation en huile  %

16. Existe-t-il des arachides provenant d'autres pays que le Tchad

oui  non  si oui, de quels pays:

1.

2.

3.

17. Comment reconnaissez-vous les arachides provenant d'autre pays?

18. Quel était le comportement des acheteurs d'arachide vis-à-vis de l'arachide Tchadienne par rapport à celles d'autres pays? Expliquez:

19. Quelles sont les périodes de disponibilité des arachides provenant d'autres pays que le Tchad (compétitif à l'arachides du Tchad dans le marché export)

<u>Pays</u>	<u>Période de l'année</u>	<u>Qualité par rapport à l'arachide Tchadienne</u>		
		<u>Superieur</u>	<u>la même</u>	<u>en bas</u>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. Comment le client de Bangui ou de Maroua règle son fournisseur qui lui expédie les sacs d'arachides depuis le Tchad?

Mode de règlement:

Espèce

Virement bancaire

Nature

21. Desirez vous augmenter votre volume d'exportation de l'arachides?

oui

non

Si oui, quels sont les facteurs limitatifs?

	<u>Important</u>	<u>Moyen</u>	<u>Faible</u>
La demande	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
La concurrence	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
La qualité	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Le prix	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Le prix de distribution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Les Taxes	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
(les autres)			
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
.....	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>