



Bundesministerium
für Wirtschaft
und Energie



MITTELSTAND
GLOBAL
WIRTSCHAFTSNETZWERK
AFRIKA

Informationsveranstaltung

WIRTSCHAFTS- NETZWERK AFRIKA

Pilotprojekt Ghana

Lebensmittelverarbeitungstechnik und -Logistik



Delegation der Deutschen Wirtschaft
in Ghana
Delegation of German Industry and
Commerce in Ghana





Ghana - Konsumtrends und Marktentwicklung für Nahrungsmittel- & Verpackungsmaschinen

VDMA / Martina Claus
Berlin, 30. Januar 2020

Photo: beermedia.de / fotolia



VDMA – The German Engineering Federation



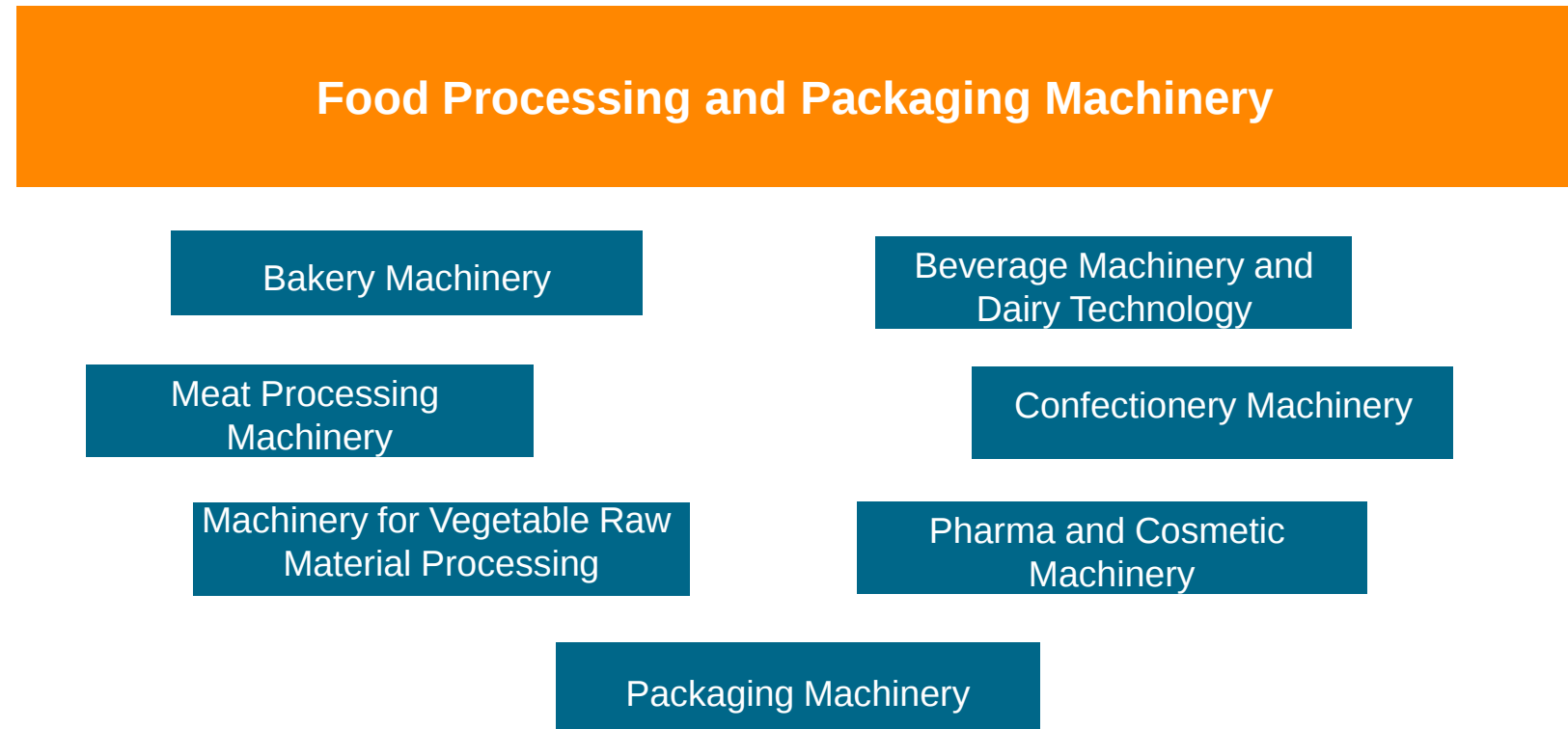
Mechanical Engineering as Key Technology

- » Covering the Entire process chain
- » Components and plant manufacturers
- » System suppliers/integrators
- » Service providers
- » Turnover nearly € 232 billion (2018)
- » 1.05 million employees (2018)

VDMA

- » More than 3,200 member companies
- » Headquarter in Frankfurt / Germany
- » 45,000 visitors per year
- » 1,500 events per year
- » 400 dedicated employees

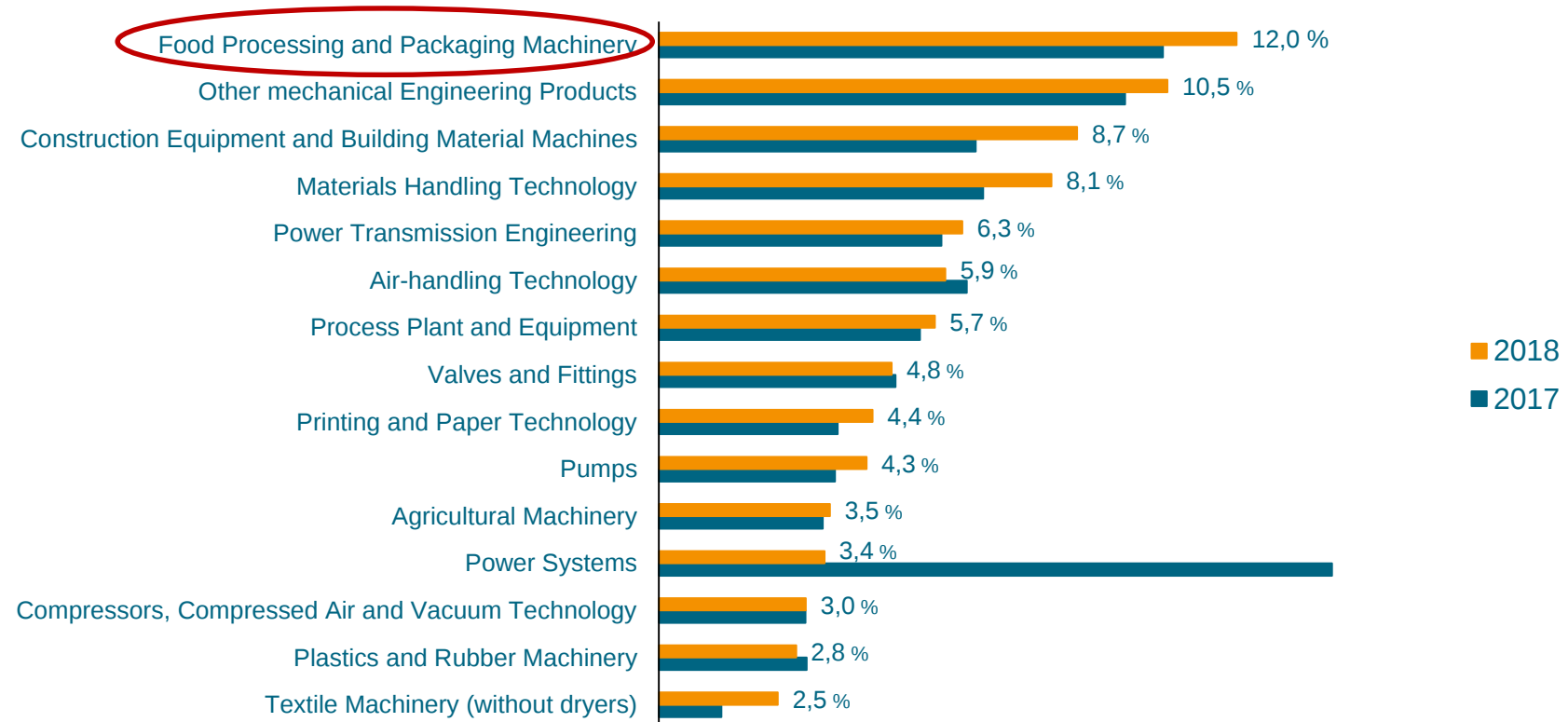
The Association



German Machinery Exports to Africa 2018

The Most Important Sectors

Total volume 2018: 4 Billion Euros

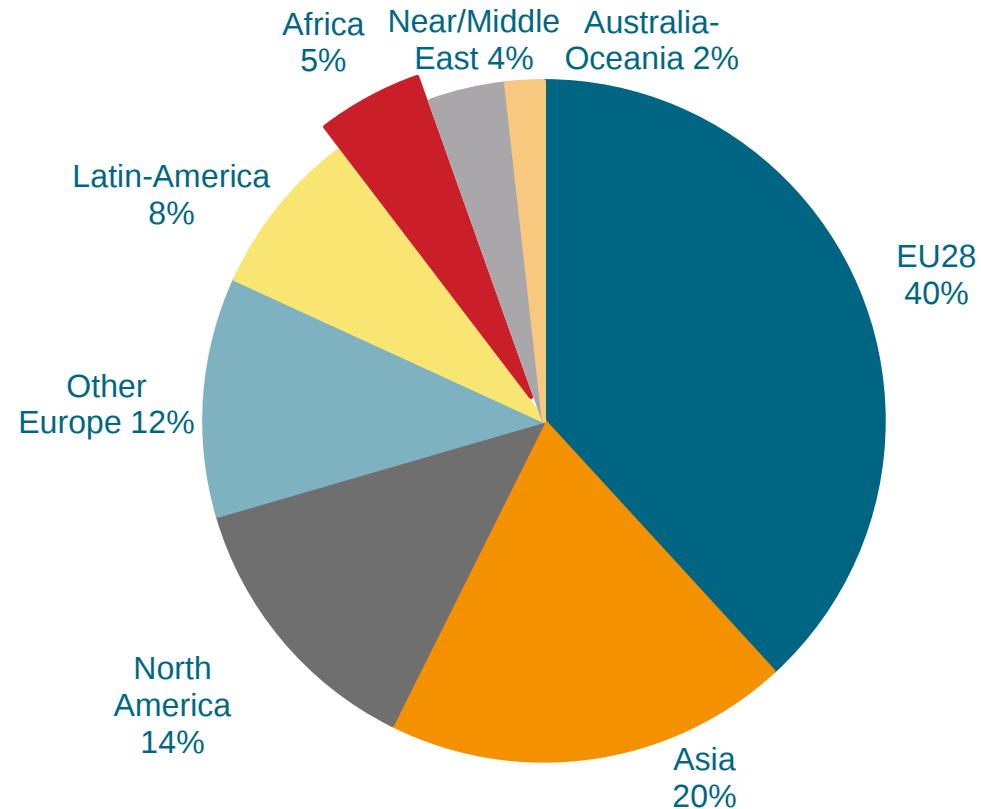


Source: National Statistical Offices, VDMA

German Exports by Region 2018

Food Processing and Packaging Machinery

In total: 9.016 Million Euros 2018

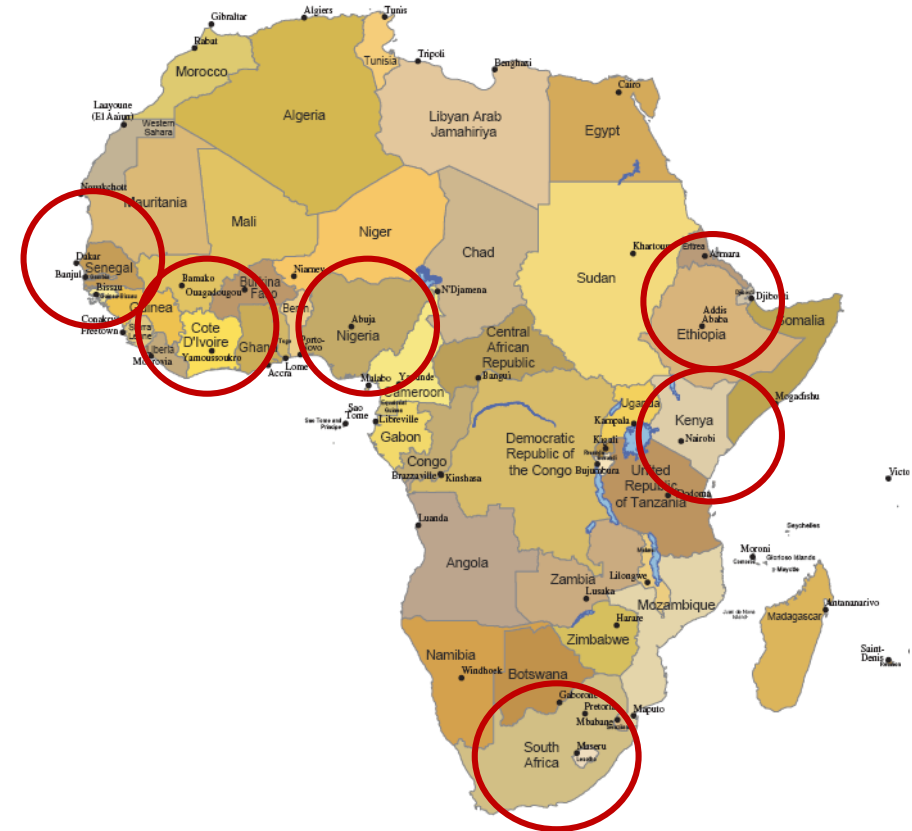


Source: National Statistical Offices, VDMA

Africa Activities

Systematic market development since 2013

- » First comprehensive information event (Feb 2013)
- » Working group "Food Markets in Africa"(Oct 2013)
- » Quarterly Newsletter "Food Markets in Africa"
- » VDMA market survey trips and symposia in:
 - Kenya
 - Nigeria
 - Ethiopia
 - South Africa
 - Senegal
 - Côte d'Ivoire

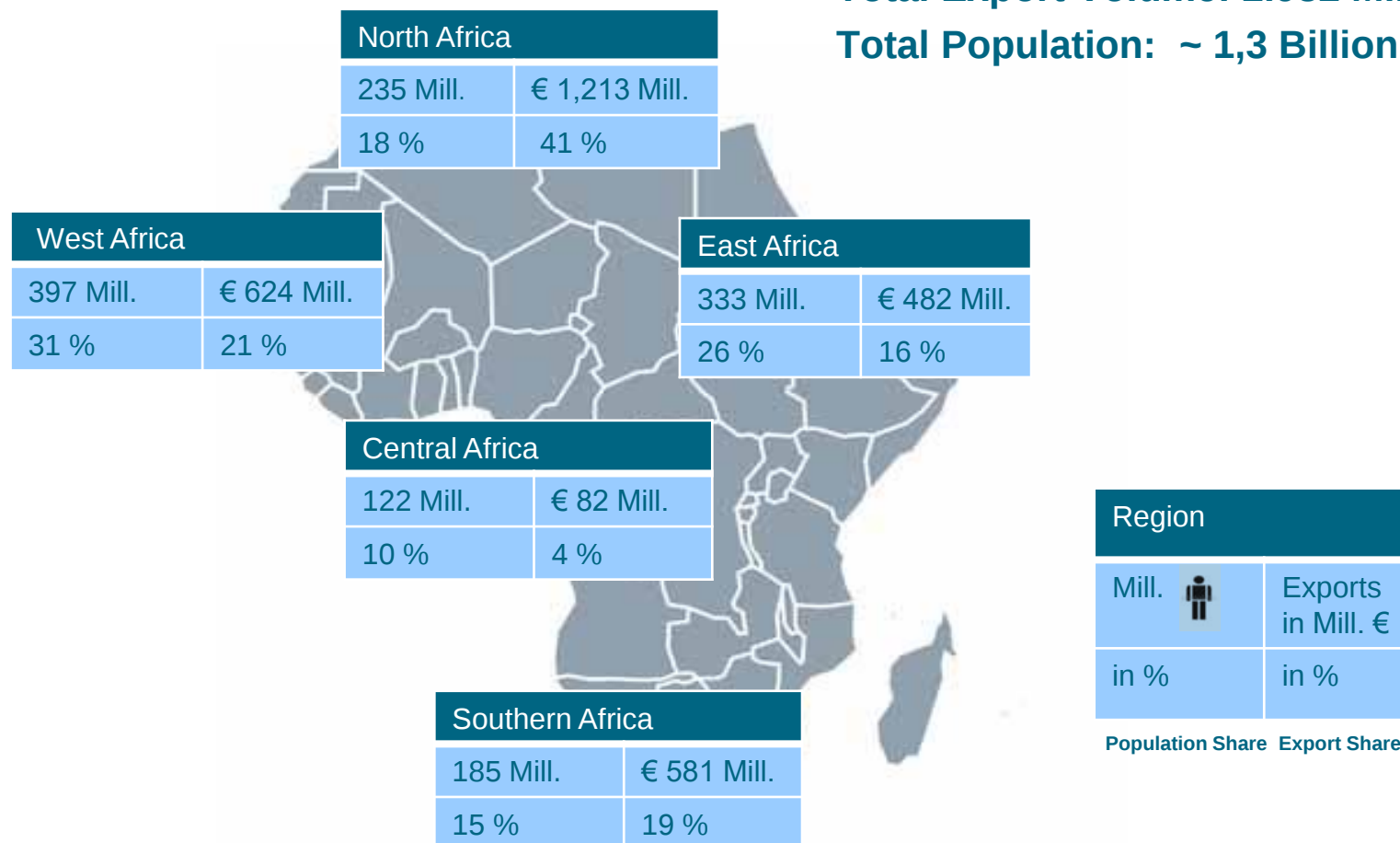


Global Exports to Africa - Regional Distribution 2018

Food Processing and Packaging Machinery

Total Export Volume: 2.982 Million Euros

Total Population: ~ 1,3 Billion



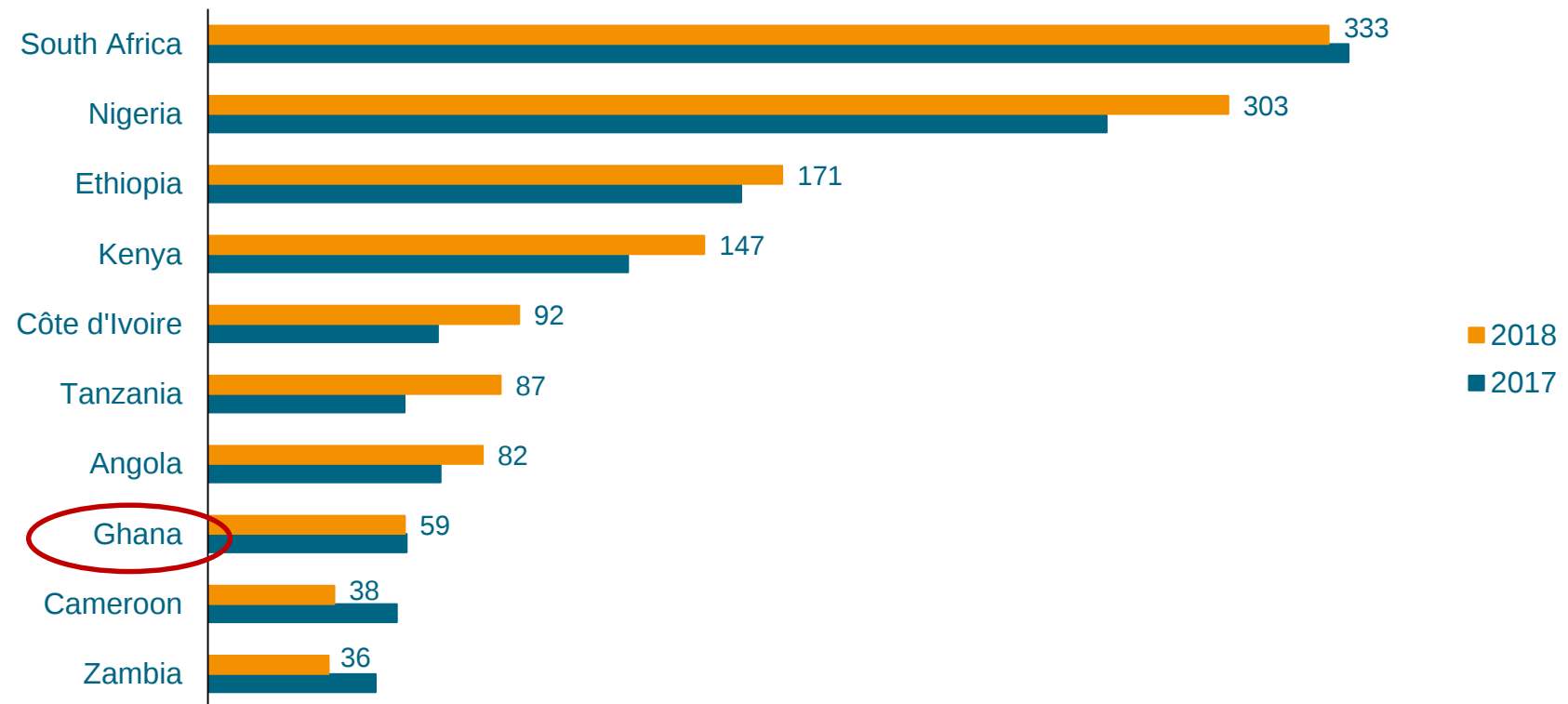
Sources: National UN Statistics, Federal Statistical Office Germany, VDMA

Global Exports to Sub-Saharan Africa – Main Markets 2018

Food Processing and Packaging Machinery



Total volume: 1,769 Million Euros

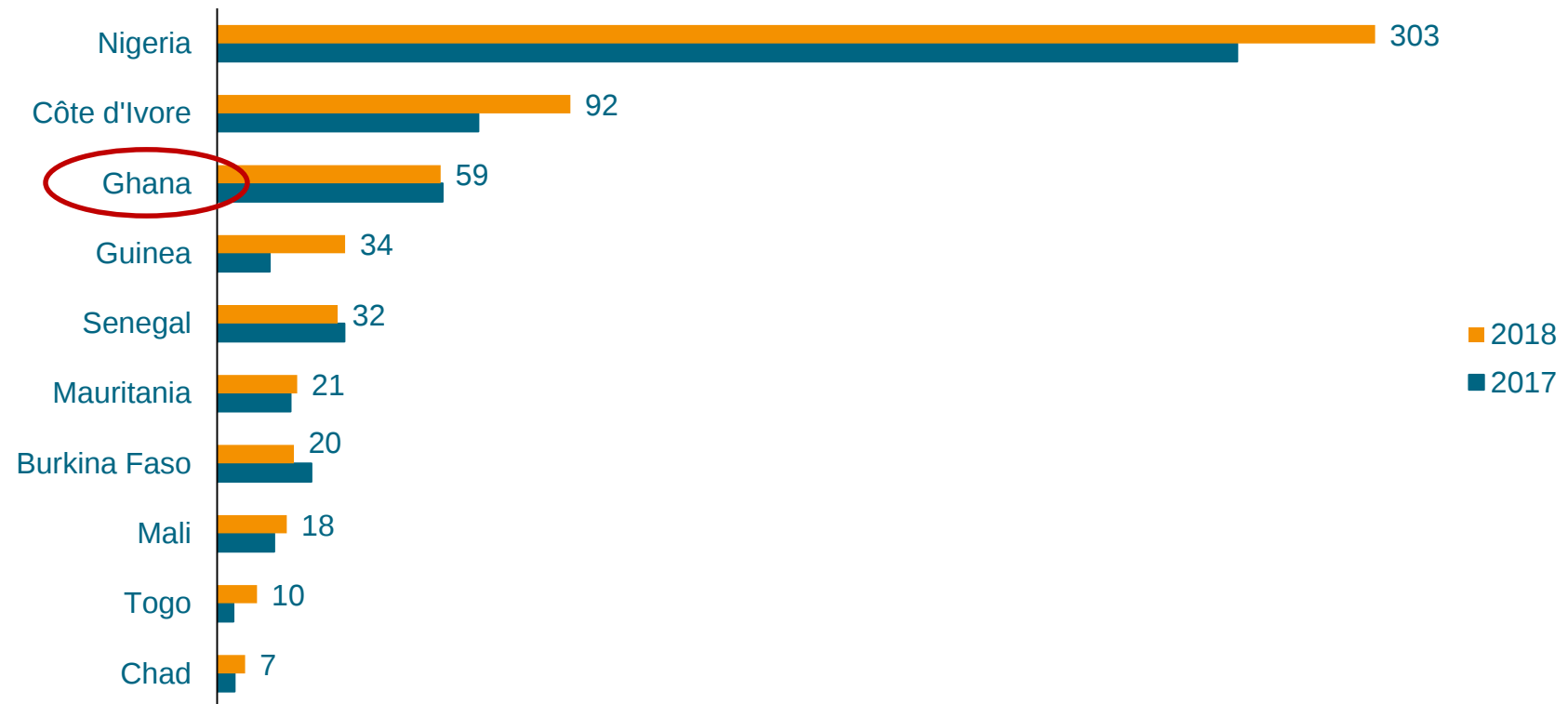


Source: National Statistical Offices, VDMA

Global Exports to West Africa 2018

Food Processing and Packaging Machinery

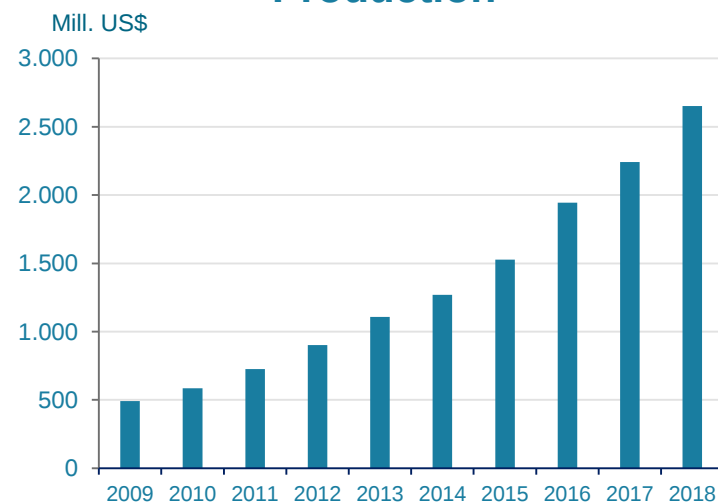
Total volume: 624 Million Euros



Source: National Statistical Offices, VDMA

Ghana – Processed Food & Beverages

Production



+ 440%

Imports



Exports

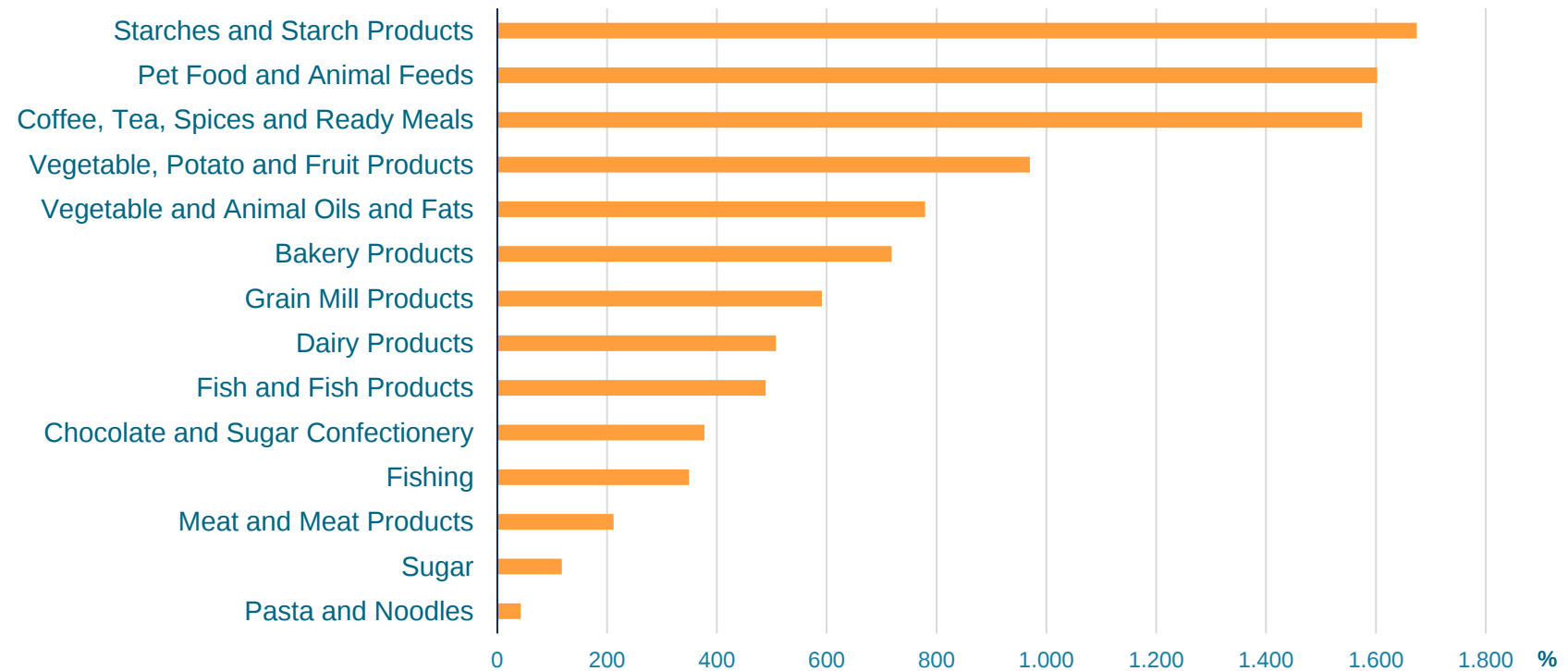


Source: Euromonitor International, VDMA

Ghana – Processed Food

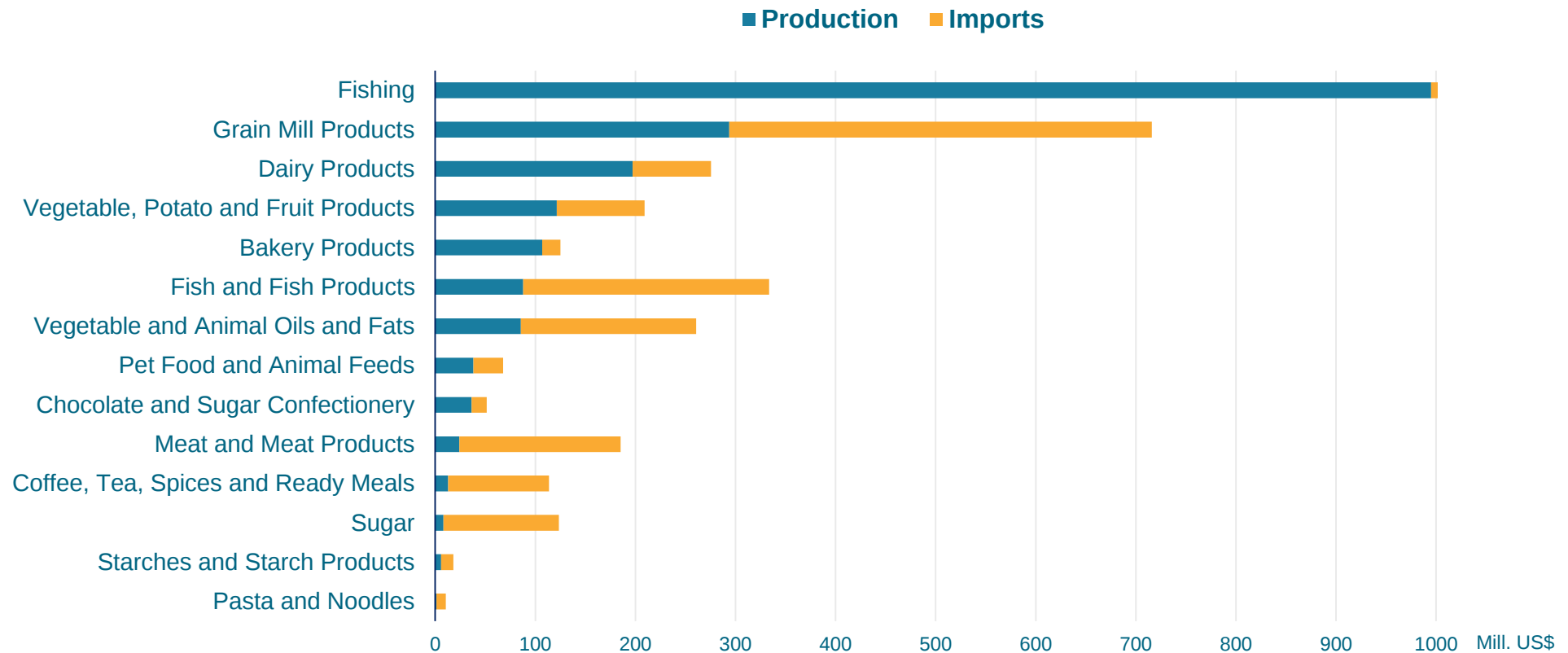


Period Growth Production 2009 - 2018



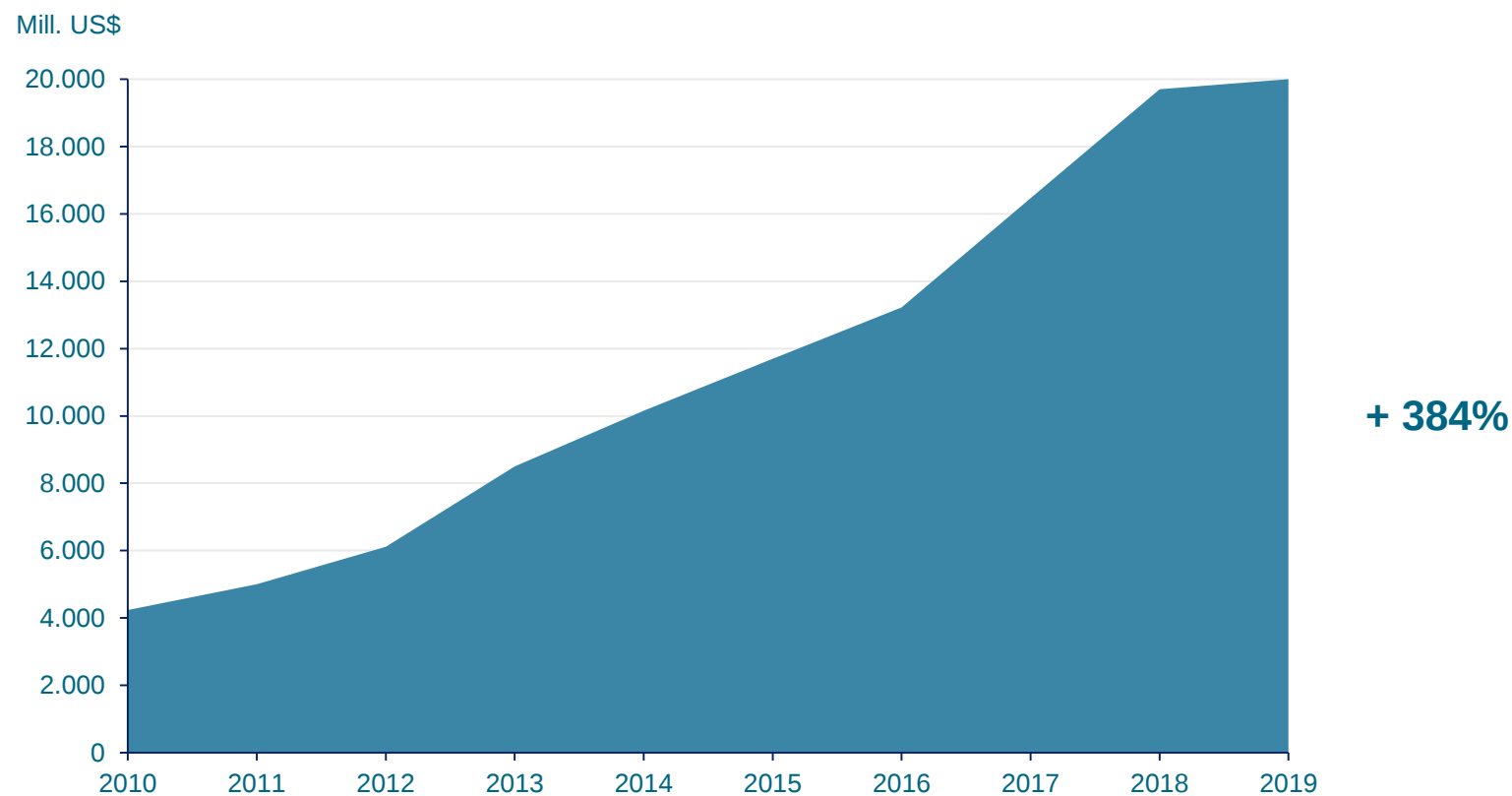
Source: Euromonitor International, VDMA

Ghana – Production & Imports of Processed Food 2018



Source: Euromonitor International, VDMA

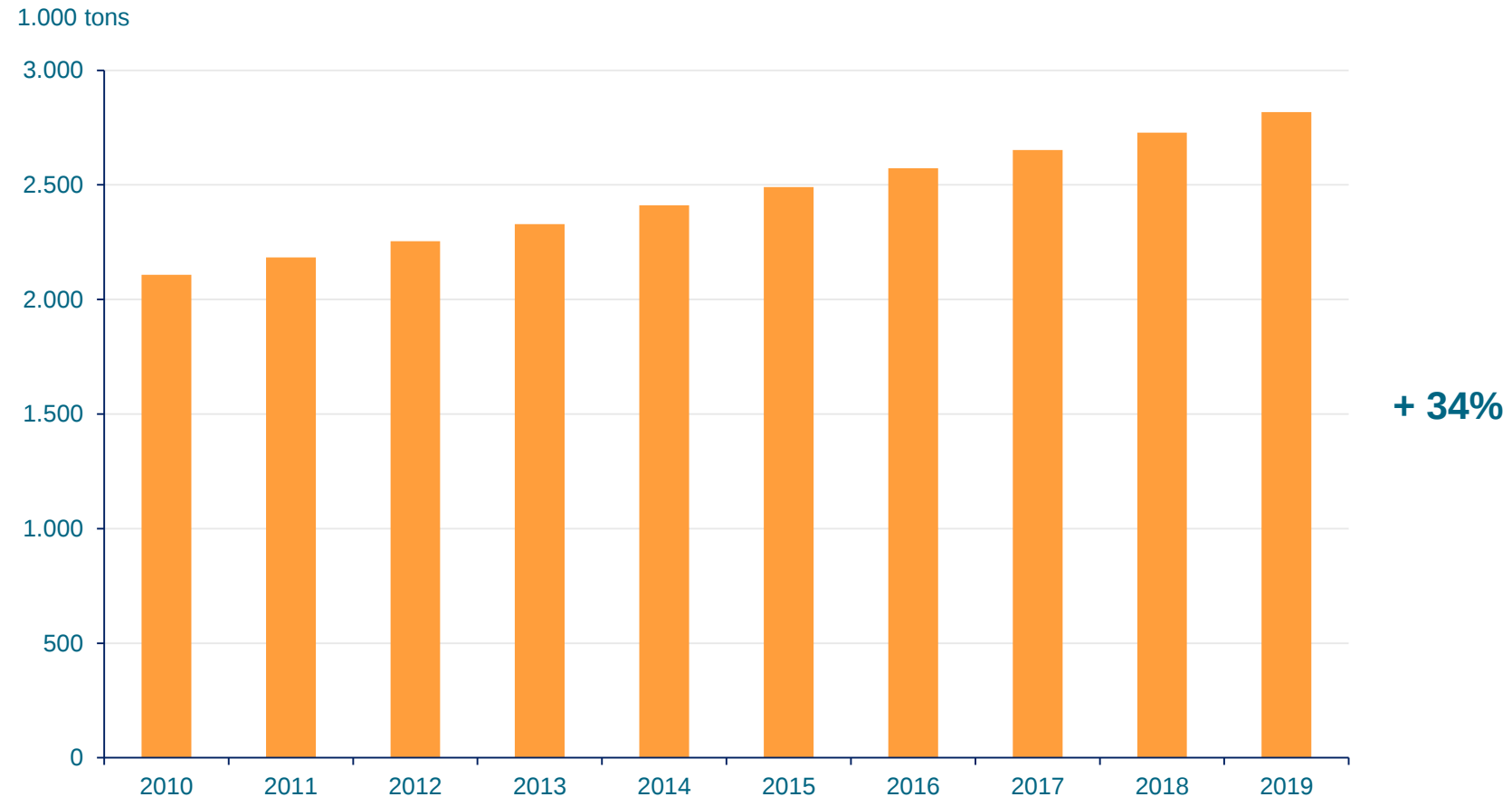
Ghana – Consumer Expenditures on Food and Non-Alcoholic Beverages



Source: Euromonitor International, VDMA

Ghana – Sales of Fresh Food, Packed & Unpacked

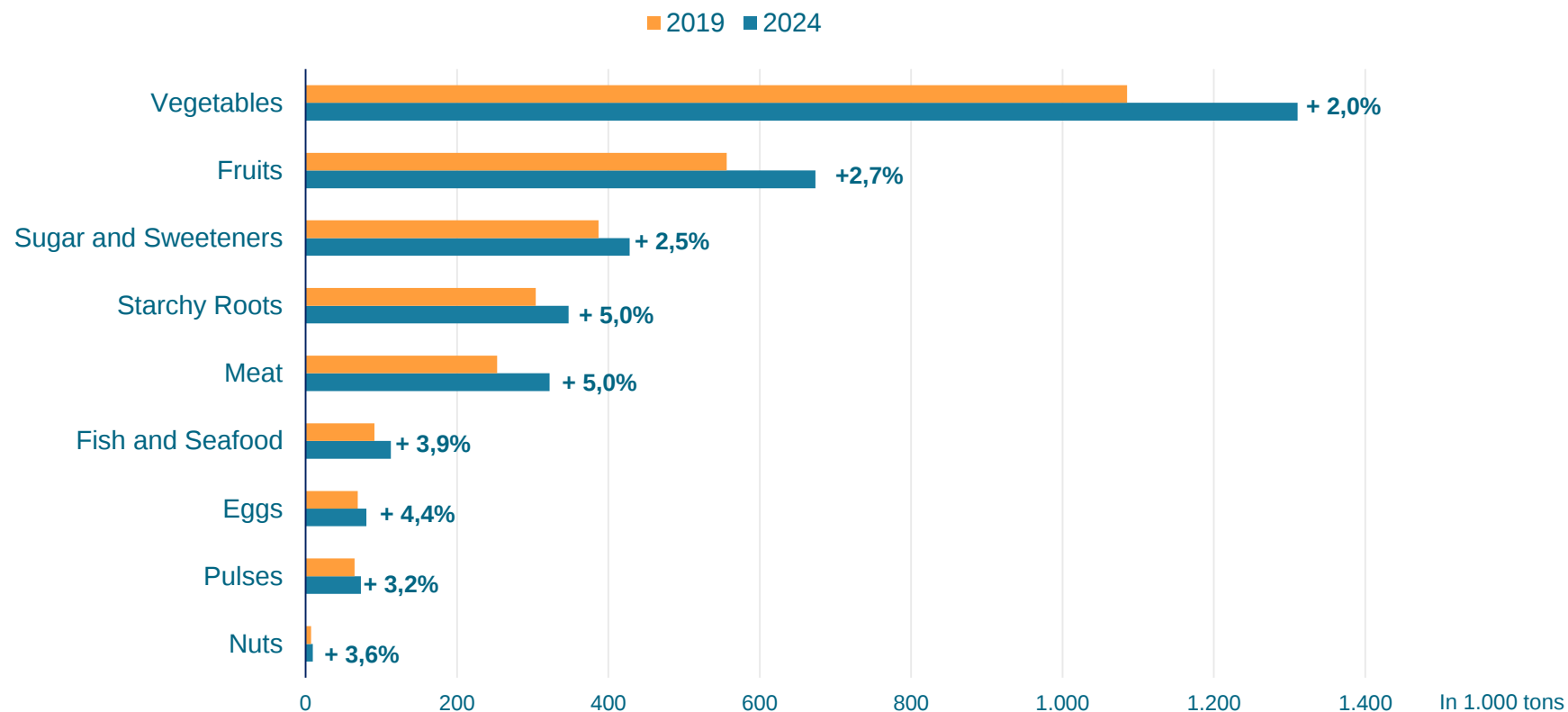
Total Sales 2019: 2.818.000 tons



Source: Euromonitor International, VDMA

Ghana – Sales of Fresh Food by Category / Forecast

CAGR (Compound Annual Growth Rate) in %

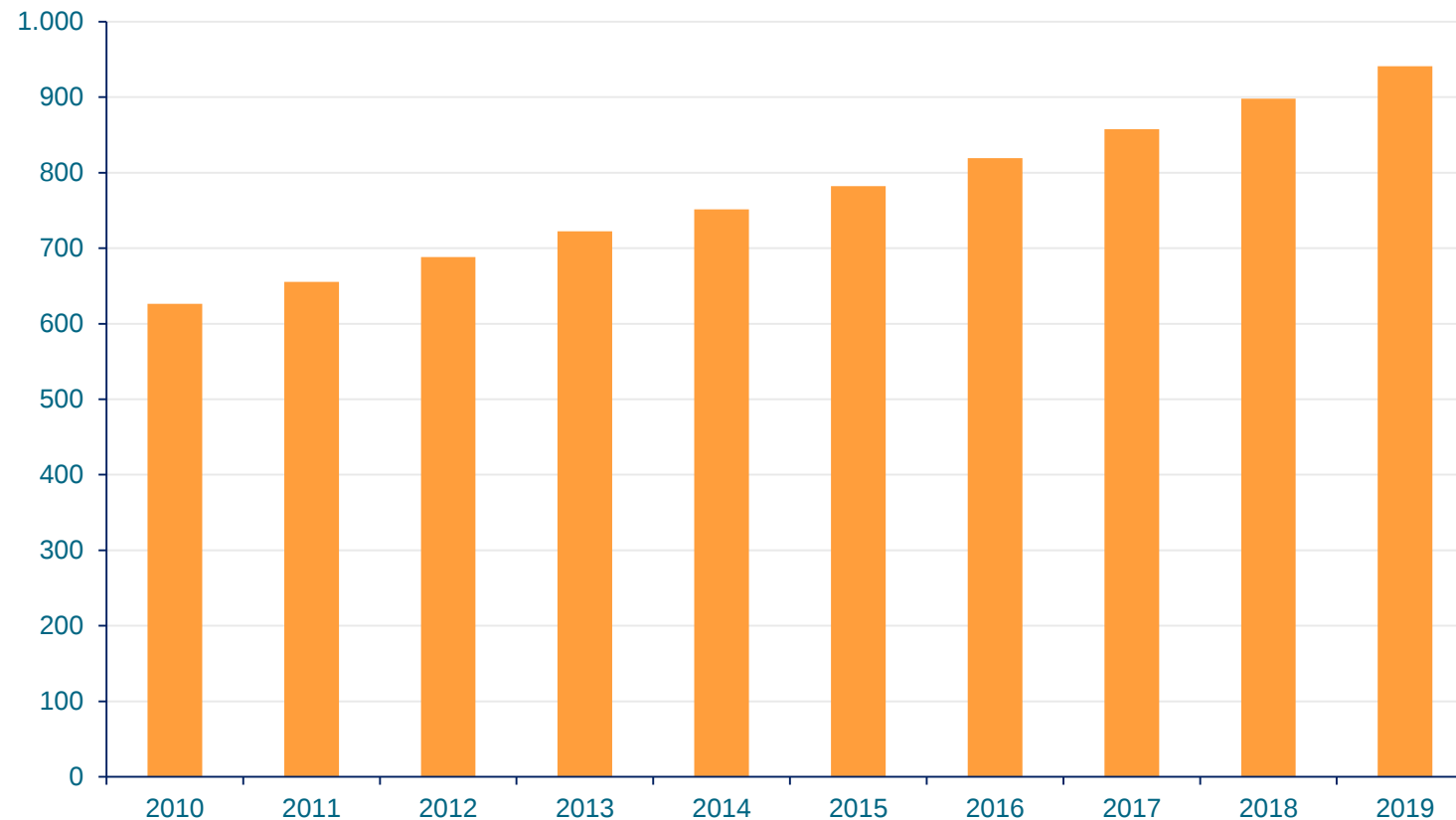


Source: Euromonitor International, VDMA

Ghana – Sales of Packaged Food

Total Sales 2019: 941.000 tons

1.000 tons

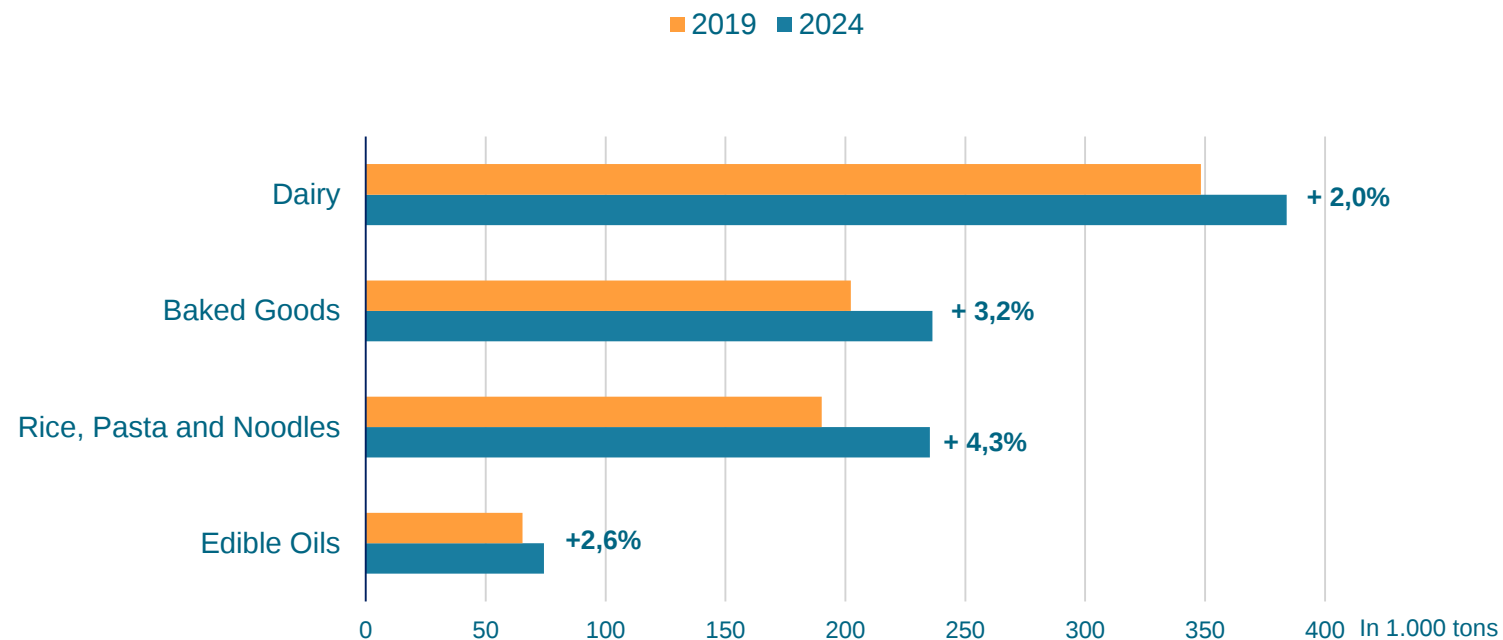


+ 50%

Source: Euromonitor International, VDMA

Ghana – Sales of Packaged Food by Category / Forecast

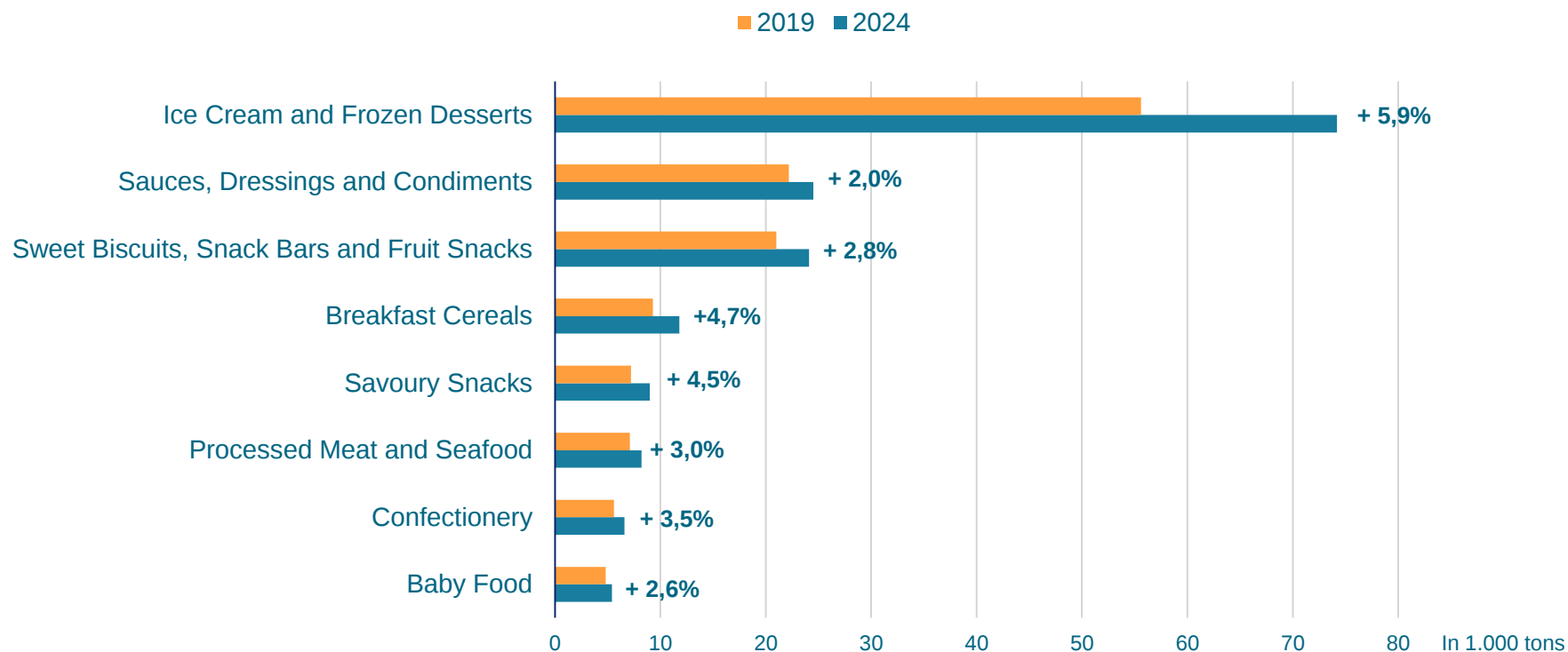
CAGR (Compound Annual Growth Rate) in %



Source: Euromonitor International, VDMA

Ghana – Sales of Packaged Food by Category / Forecast

CAGR (Compound Annual Growth Rate) in %

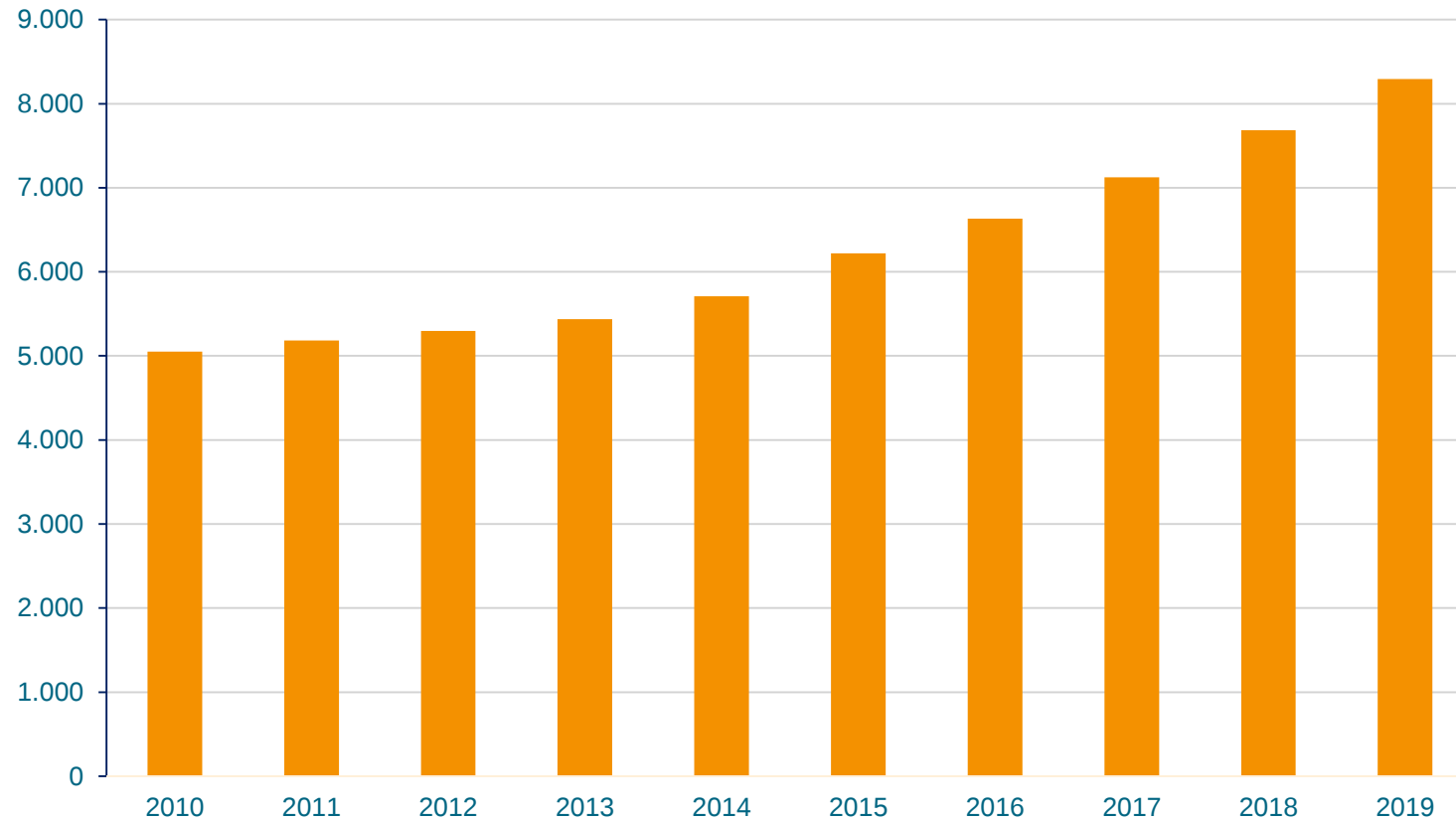


Source: Euromonitor International, VDMA

Ghana – Sales of Soft Drinks & Beer

Total Sales 2019: 8,2 Billion litres

Mill. litres

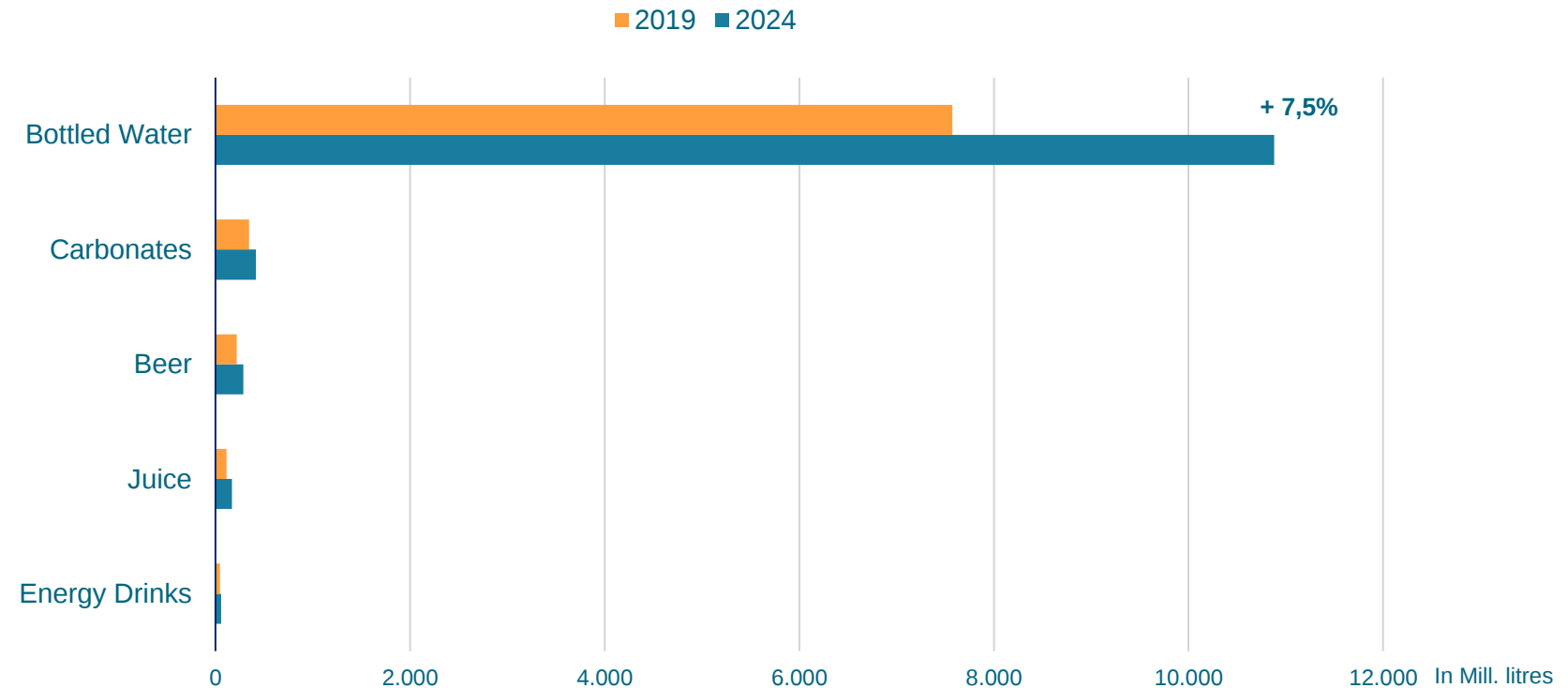


+ 64%

Source: Euromonitor International, VDMA

Ghana – Sales of Soft Drinks & Beer by Category / Forecast

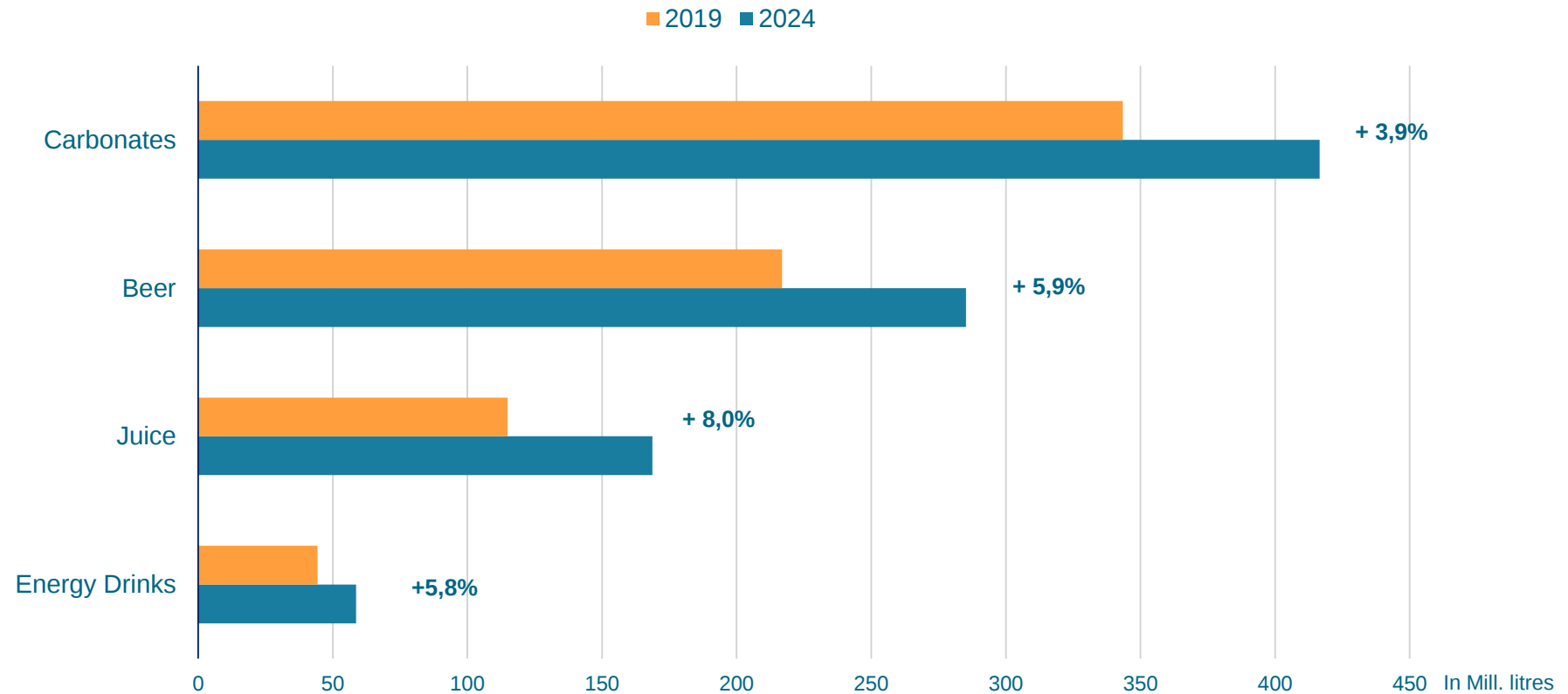
CAGR (Compound Annual Growth Rate) in %



Source: Euromonitor International, VDMA

Ghana – Sales of Soft Drinks & Beer by Category / Forecast

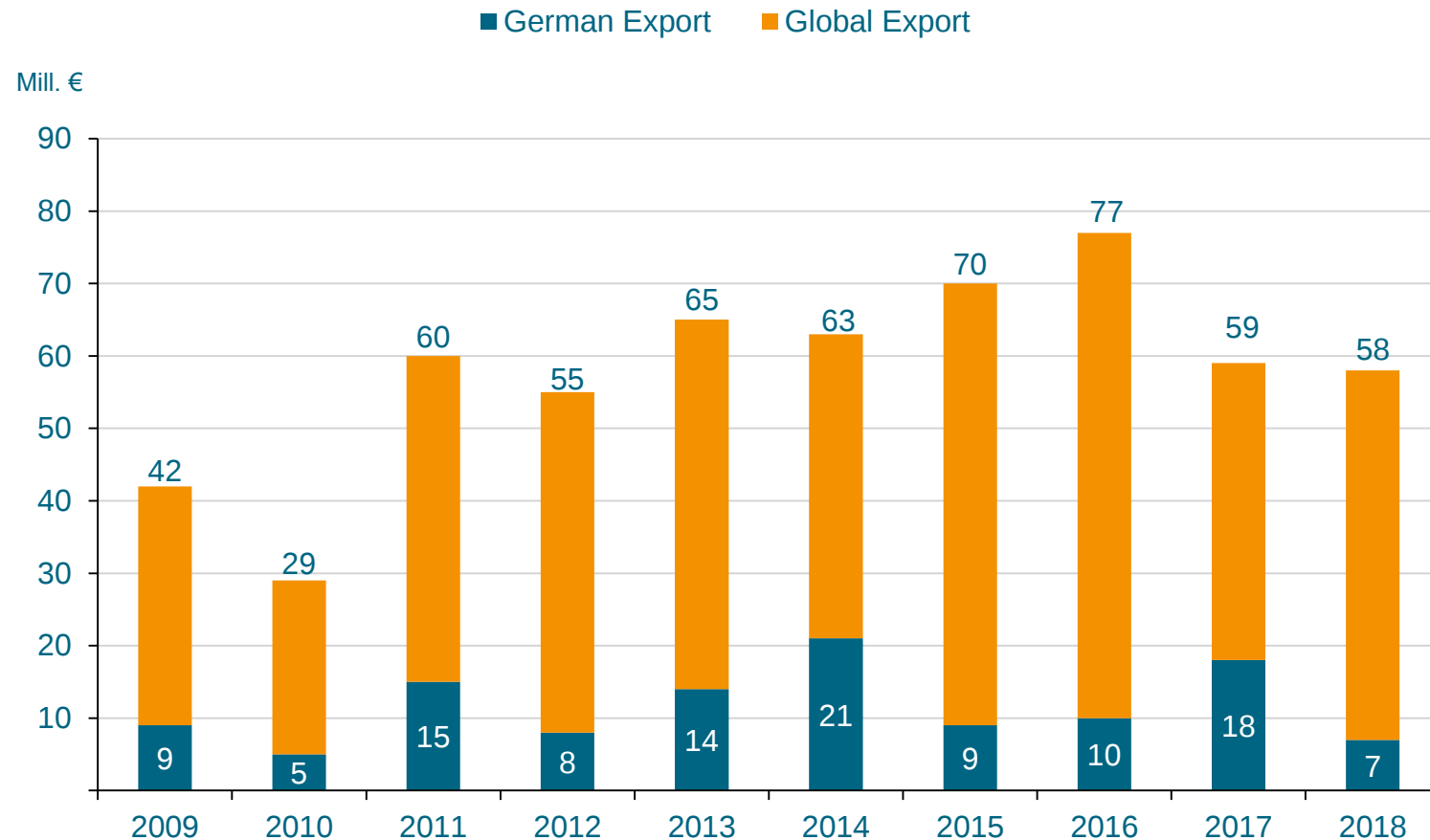
CAGR (Compound Annual Growth Rate) in %



Source: Euromonitor International, VDMA

Global and German Exports to Ghana 2009 – 2018

Food Processing and Packaging Machinery

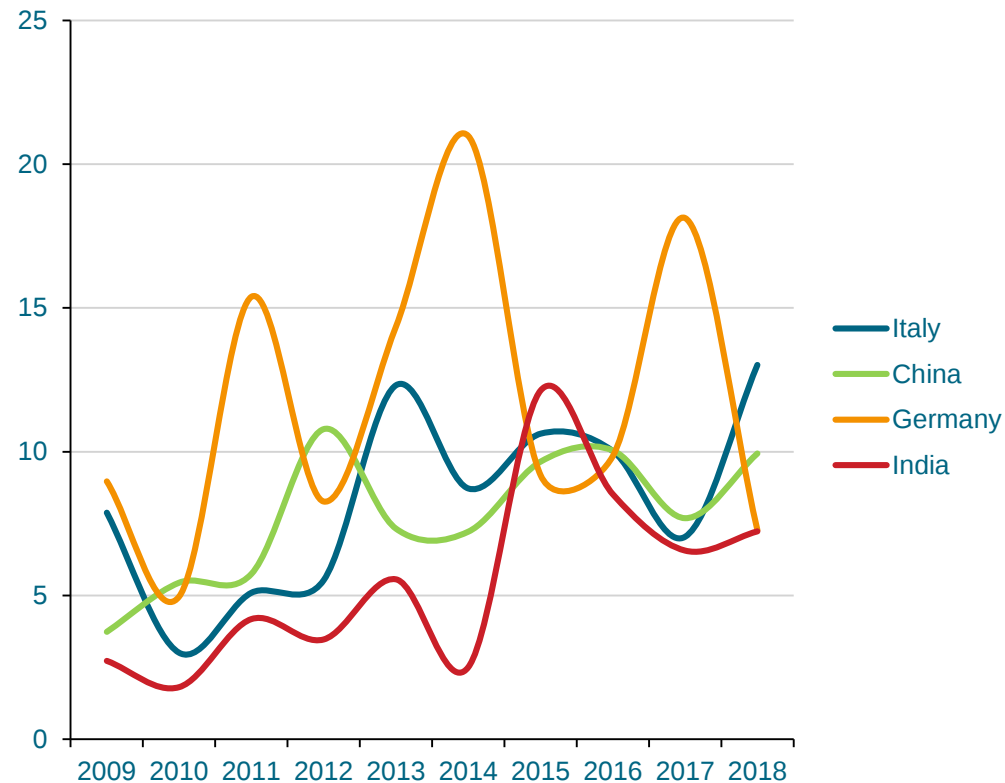


Source: National Statistical Offices, VDMA

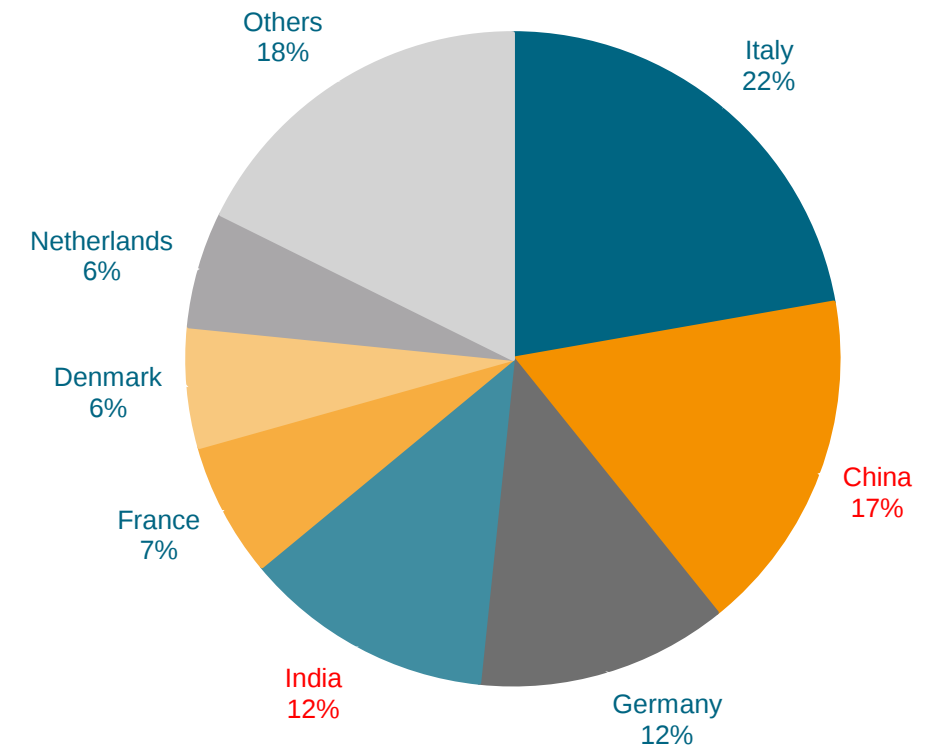
Main Supplier Countries to Ghana 2009 – 2018

Food Processing and Packaging Machinery

Total Volume 2018: 59 Million Euros



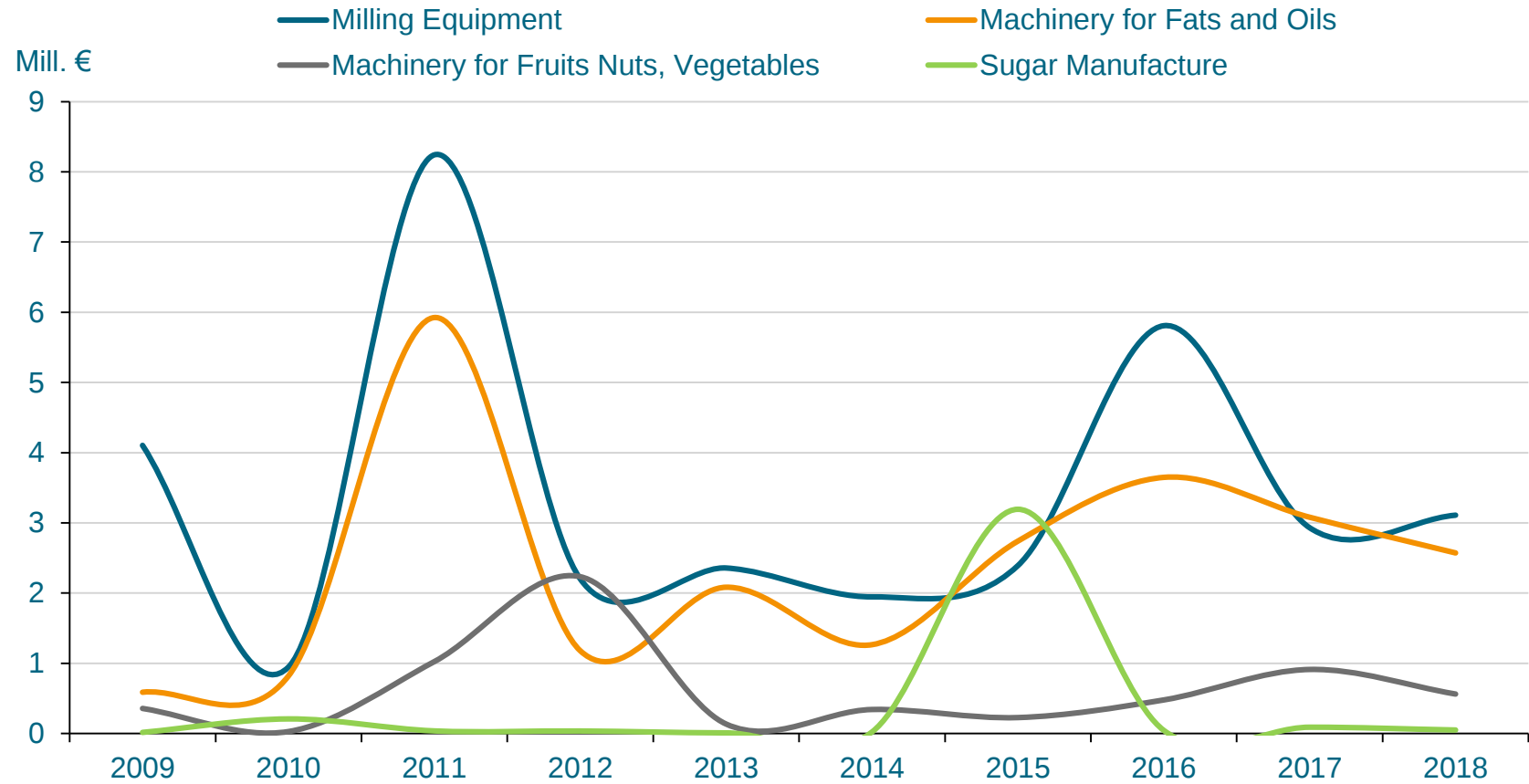
Main Supplier Countries 2018



Source: National Statistical Offices, VDMA

Global Exports by Product Groups to Ghana 2018

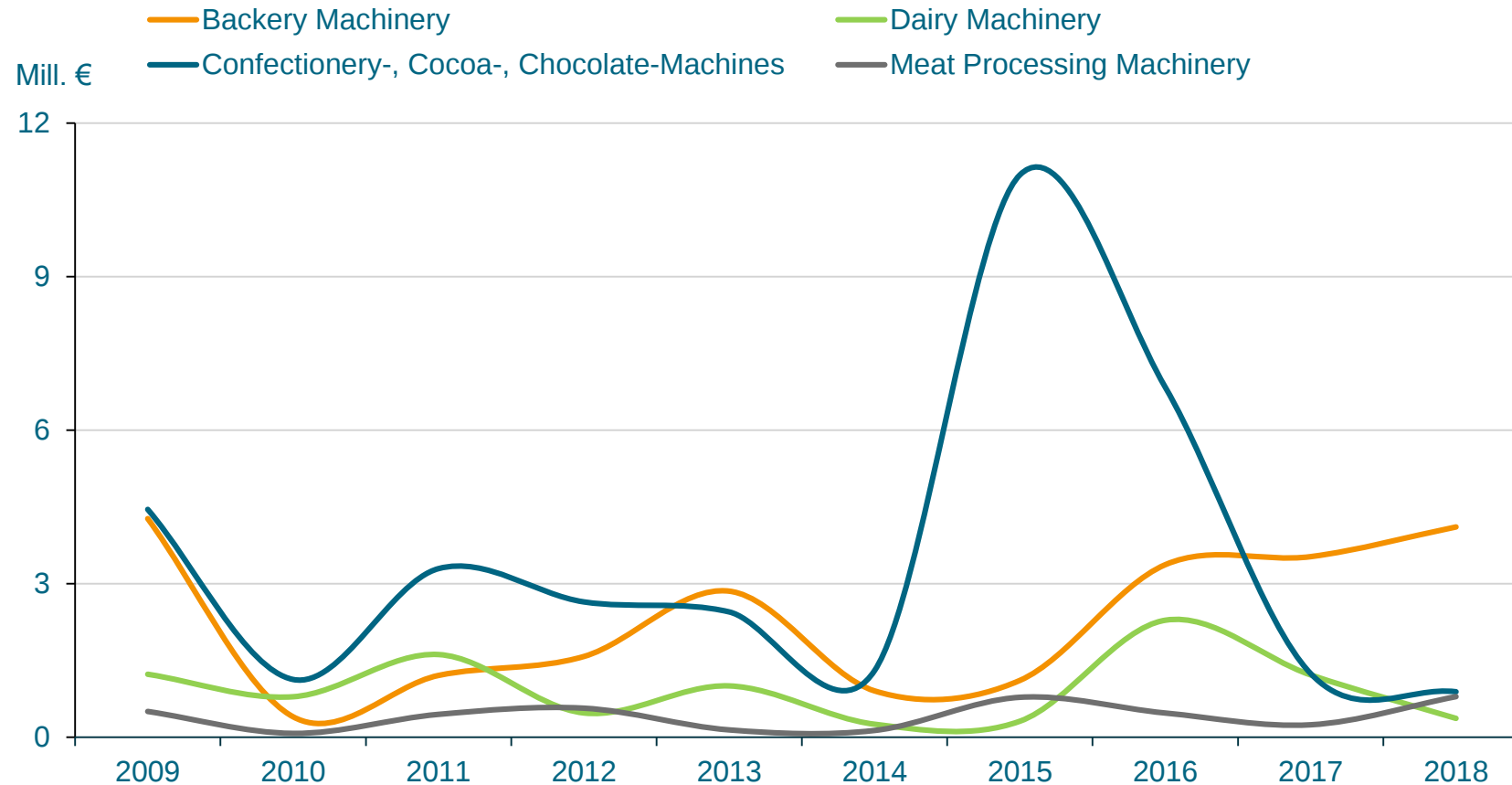
Food Processing and Packaging Machinery



Source: National Statistical Offices, VDMA

Global Exports by Product Groups to Ghana 2018

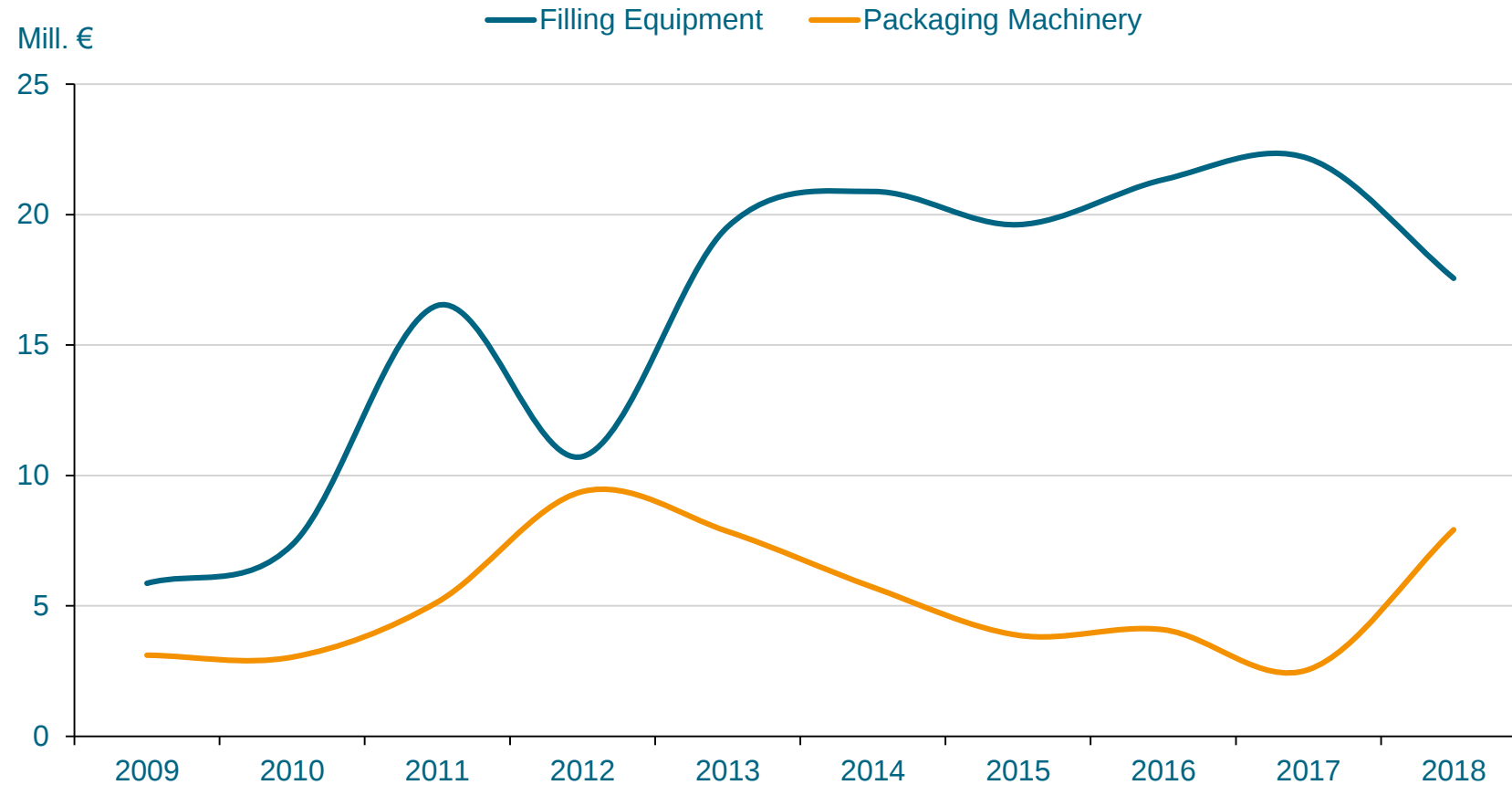
Food Processing and Packaging Machinery



Source: National Statistical Offices, VDMA

Global Exports by Product Groups to Ghana 2018

Food Processing and Packaging Machinery



Source: National Statistical Offices, VDMA

Summary - Outlook

Packaged Food

- » Continuing strong sales of staple foods expected (e.g. edible oils, dairy, baked goods, pasta, rice & noodles)
- » Staple and essential foodstuffs consumption growing among low income population
- » Open markets major source for fresh food and many packaged food products, especially low priced staples
- » Mid- and high-income consumers increasingly buy higher-priced, value-added products in supermarkets
- » Babies and children represent a large percentage of the population. This supports strong growth in sales of baby food, sweet biscuits, snack bars, fruit snacks, baked goods and confectionary





Summary - Outlook

Beverages

- » Soft drinks growing steadily, sales focussing on bottled water, carbonates and juices
- » Poor tap water supports high demand for purified sachet water
- » Rising health-consciousness of middle- and high-income consumers drives shift from carbonates towards juices
- » Population and GDP growth are expected to boost sales





Thank you
Thank you
for your attention!

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