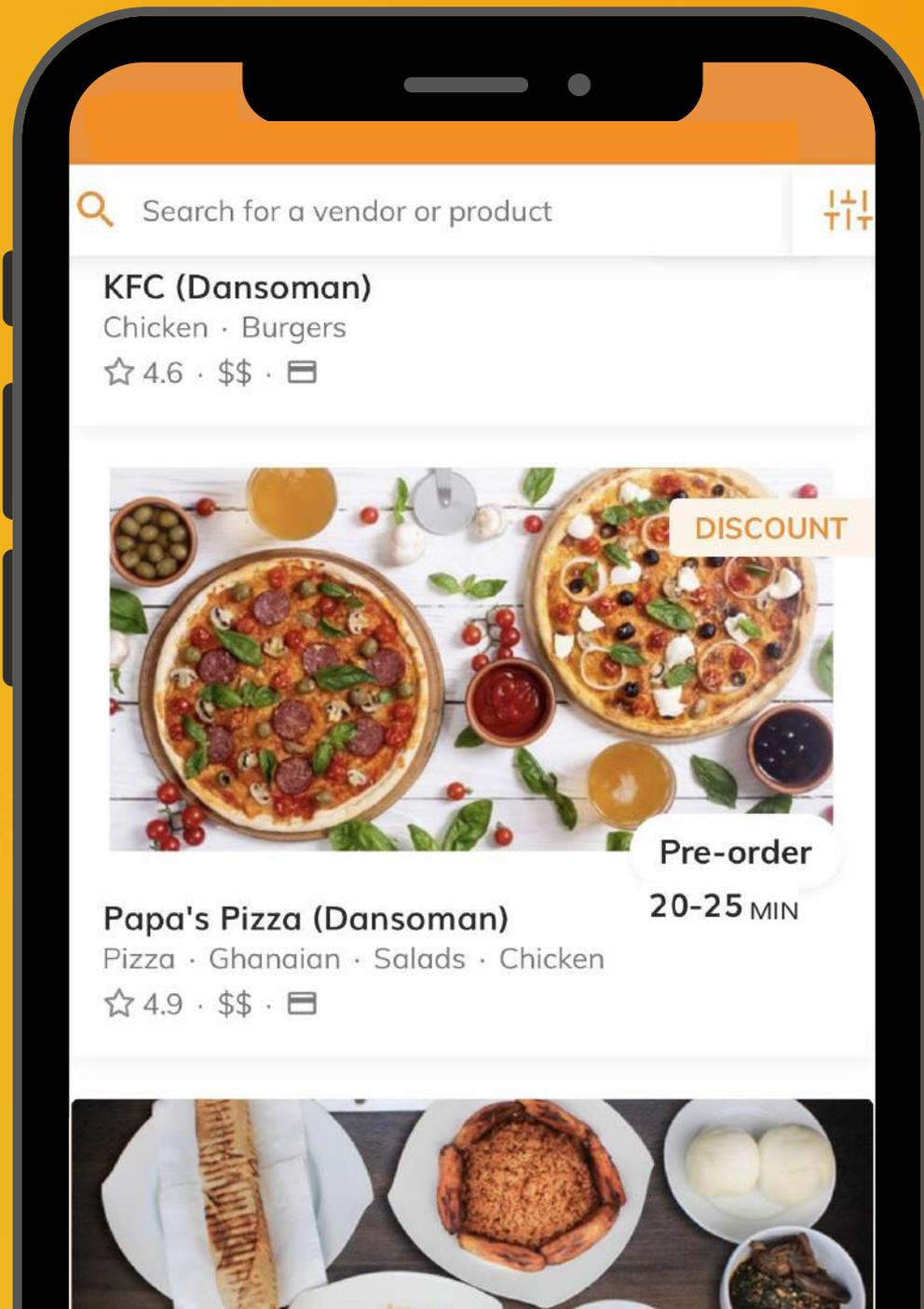




GHANA

FOOD INDEX 2020



ONLINE FOOD & BEVERAGE DELIVERY IN GHANA

The Ghanaian food and grocery retail market was valued at USD 311.7 million in 2018 and it is expected to grow at a CAGR of 14.6% to reach over USD 500 million by 2026. The increasing disposable income of the people in Ghana, will increase the buying power of people for consumer goods. According to the World Bank, in 2017, the household final consumption expenditure has grown by 11.3% in Ghana. Also, increasing urbanization is one of the factors driving the Ghana retail industry market In 2019.

Ghanaians spend most of their income on food and non-alcoholic beverages that account for 41% of total expenditure. Ghana is the 11th largest grocery retail market in Africa, and the second largest in West Africa only after Nigeria. Hence, online food delivery is gaining momentum through companies such as Jumia Food.

Due to the impact of the Covid-19, there has been a growth in food and non-alcoholic beverage orders in 2020, as consumers re-prioritise their spending patterns towards only essentials. The food and grocery retail market includes the retail sales of all food products, both packaged and unpackaged, as well as beverages (including retail sales of all alcoholic and non-alcoholic beverages), and household products.

Post-COVID Online Food delivery is changing habits in unexpected ways as more Ghanaians have shifted to buying food and groceries online to limit risks of contracting the virus, save money and time. Generally Ghanaians have embraced the concept of online food delivery better after the scare of the coronavirus pandemic.

Agriculture is 23% of continental GDP of Africa. Ghanaians spend 65% of their income on Food. Agriculture and Food and Beverage employed 29.27% of the country's population in 2019 which was higher than the 2020 figure of 28.46. The slight decline over the past year can be attributed to the covid-19 pandemic which continues to have adverse socio-economic effects around the globe. However, measures need to be put in place to develop interest and create further opportunities in order to grow sustainably as the online food market increases.

Jumia Food is the most used online food delivery service in Ghana operating in 3 major cities including Accra, Tema and Kumasi. As a leader, Jumia will continue to deploy capabilities across the food value chain to ensure consumers buy Food online safely and at the right price in line with the theme of this year's World Food Day celebration of Grow, Nourish, Sustain Together.

E-Commerce in Africa is still at its infancy by global standards standing at less than 2% vs 20% in China or 12% in the USA. Despite this, e-commerce remains promising with rising GDP contribution indicating a consumption driven region and for Job creation. New innovations in the food industry, one of the world's oldest and largest industries, are creating attractive opportunities for women and youth on the African continent. More than 5 millions jobs can be created in 2025 in Africa by Online Marketplace.

GHANA FACTS



POPULATION

29.3 M

2020

Ghana's average age is 21 year old. It is projected to keep growing to around 50 or even 60 million people by 2050.



GDP GROWTH

6.5%

2019

With a GDP growth rate of 6.5%, it is forecasted that Ghana's Economic growth will increase to over 7.6% in 2020.



JOBS & AGRICULTURE

29.27% of GDP

2019

In 2019, 29.27 percent of the employees in Ghana were active in the agricultural sector.



ONLINE FOOD & BEVERAGE MARKET IN AFRICA

\$311 M

2018

Expected to grow to US\$ 500m by 2026.

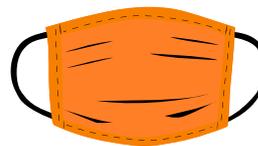


JOB CREATION

3 M

est. 2025

Online marketplaces in Africa can create about 3 million jobs by 2025.



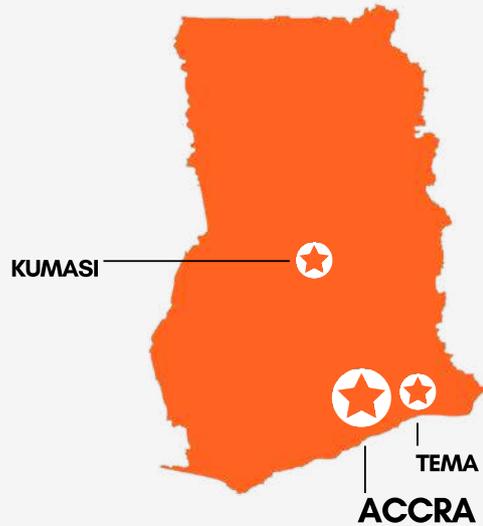
COVID-19

47,000

POSITIVE CASES IN GHANA

October 1st 2020.

JUMIA FOOD FOOTPRINT IN GHANA



JUMIA FOOD is Africa's largest Food delivery company operating in 9 countries in the continent. Consumers can order for restaurant meals, groceries, beverages, pharma care and supermarket products, having them delivered in less than 45 minutes.

2012 Since
Food partners **+400**
3 Cities

HOW DOES IT WORK?

Delivered as fast as 30min.



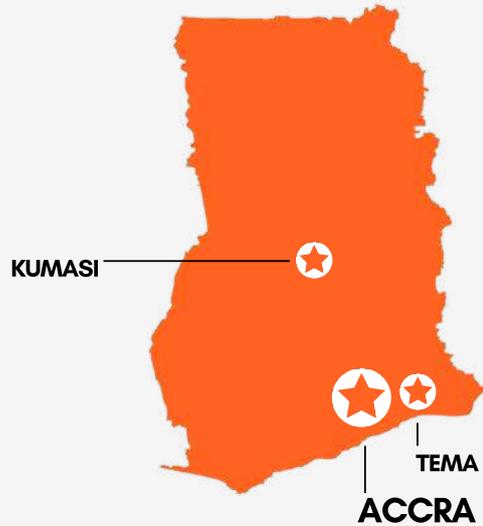
CONSUMERS



VENDORS



JUMIA FOOD FOOTPRINT IN GHANA



JUMIA FOOD is Africa's largest Food delivery company operating in 9 countries in the continent. Consumers can order for restaurant meals, groceries, beverages, pharma care and supermarket products, having them delivered in less than 45 minutes.

2012 Since
Food partners **+400**
3 Cities

HOW DOES IT WORK?

Delivered as fast as 30min.



CONSUMERS



VENDORS



COVID-19

JUMIA'S ACTIONS



HYGIENE FIRST

Jumia adopted the highest safety standards in its daily operations and delivery services to ensure the safest experience to its consumers.



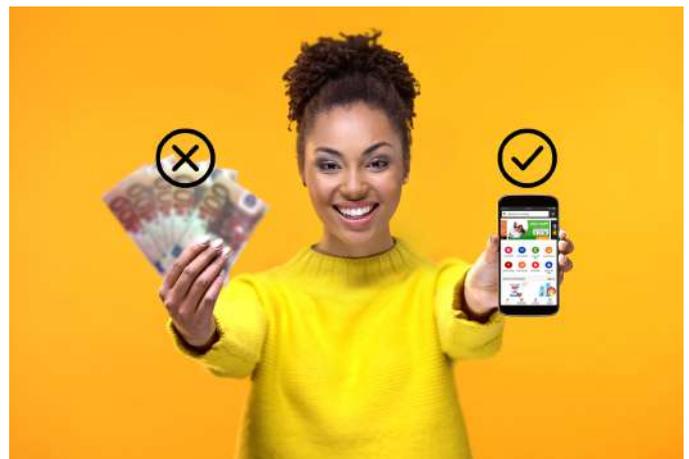
CONTACTLESS DELIVERIES

The #JumiaHeroes deliver millions of items and meals while remaining safe and making consumers safe, thanks to the adoption of contactless delivery methods.



CASHLESS PAYMENTS

Online payment through JumiaPay is the safest payment method, aligned with the governments' bid to reduce the risk of virus transmission through physical cash.



COVID-19

SUPPORTING THE COMMUNITIES



FREE DELIVERIES

Encouraged consumers to stay home and shop online by offering free home delivery for their online purchases.



FACE MASKS DONATION

Donation of 20,000 face masks to the Ministry of Health Ghana.



RECKITT BENCKISER PARTNERSHIP

Partnership with Reckitt Benckiser to offer free nationwide delivery of essential health, hygiene and home products.

ONLINE FOOD BUSINESS

J U M I A D A T A *



TOP CITIES IN GHANA

BY VOLUME OF ORDERS

1. ACCRA
2. TEMA
3. KUMASI

Accra is the leading city in Ghana.



PRICE FOR ESSENTIALS

ON JUMIA

AVERAGE / RANKING FROM THE LOWEST

SUGAR 1kg	RICE 1kg	FLOUR 1kg
Ghs. 10	Ghs. 10	Ghs. 12

Average prices for Rice and Sugar are mostly below Ghs. 10.



AVERAGE ORDER VALUE

2020 FIGURES

1. RESTAURANT	GHS. 68
2. GROCERIES	GHS. 109
3. BEVERAGE	GHS. 144



MOST POPULAR LOCAL FOOD VENDORS

- YES CHEF
- HONEY SUCKLE
- ZEALLERS
- LA PIAZZA
- PAPAS PIZZA
- NOURISH LAB
- AZMEERA RESTAURANT
- OJ's Eatery
- Final Touch Waakye
- Hightech



MOST POPULAR INTERNATIONAL VENDORS

1. KFC
2. BURGER KING
3. CHICKEN INN

*Q1 & Q2 2020



INTERVIEW
DIANA OWUSU-KYEREXO
 CEO OF JUMIA GHANA

How do you see the Online food business in Ghana and what have been some of the great achievements of Jumia Food in Ghana?

Over the past 7 years, Jumia has been dedicated to improving the lives of Ghanaians through the internet by providing affordability and convenience while also ensuring that local businesses are developed. The online food business has seen a great spike in recent years as more and more people embrace technology and ecommerce. The increase in number of internet and smartphone users has played a key role in this regard. Today, many people enjoy their favorite meals from the convenience of their homes and offices by just ordering online and getting the meals delivered. Jumia has played a key role in the growth of the Ghanaian online food business by empowering many small scale food vendors to reach more customers online. With our ecosystem, food vendors benefit from the many customers who shop on our retail platforms. Innovations and technologies introduced over the years has also made it easier for restaurants and food vendors to manage their orders and maximize profits. With the covid-19 pandemic being widespread in 2020, providing consumers with many quality affordable options to choose from while staying safe at home and supporting restaurants to grow remain some of our greatest achievements thus far.

How has the Covid-19 pandemic impacted the business and how did Jumia Food support the restaurants and customers during this period?

Many businesses around the world have taken a hit due to the coronavirus pandemic and the online food business was not left out. Restrictions in movement, lockdown, closure of many restaurants and public places and unemployment as a result of layoffs have all contributed to the downward slope of business. However, the situation also presented a great opportunity for Jumia to support restaurants. Reduced delivery fees for consumers encouraged them to stay home and stay safe while ordering from their favorite restaurants. The use of Jumia pay also helped reduce the risks of transmission through cash by allowing consumers to pay for their food through Mobile Money or card at the point of delivery.

What are some of the trends you see in the food industry and how does the future look for online food delivery in Ghana?

The online food business in Ghana has seen very dynamic trends over the past few years. About 56% of the total orders come from men while people within the ages of 25-34 years use Jumia Food the most. This can be attributed to their strong knowledge of technology and their adaptation to new and improved innovations. Majority of the meal orders are for lunch while Fridays appear to be the days when there are most orders on Jumia. All in all, there appears to be great potential for the online food market as advancements in technology and internet penetration increases. There is now more than ever a need to stay safe which begs the need for the usage of such online platforms to reduce physical contacts as much as possible while still enjoying the best meals at the most affordable prices.

GHANA ONLINE FOOD TRENDS



ONLINE FOOD CONSUMERS TRENDS

J U M I A D A T A *



MOST POPULAR CUISINES IN GHANA

1. CHICKEN
2. PIZZA
3. GHANAIAN

Fast food is the preferred food order in Ghana due to the affordable prices.



MOST PROMISING CUISINES

1. SHAWARMA
2. ITALIAN
3. CHINESE

Foreign cuisines are growing fast as Ghanaians explore various meals available to them.



DAY OF DELIVERY

MONDAY	14%	████
TUESDAY	15%	████
WEDNESDAY	14%	████
THURSDAY	15%	████
FRIDAY	14%	████
SATURDAY	15%	████
SUNDAY	15%	████



TIME OF MEALS

BREAKFAST	1%
LUNCH	59%
DINNER	40%



CONSUMER'S AGE

18 - 24	34%	████
24 - 34	45%	████████
34 - 44	14%	████
44 - 45	4%	██
55+	3%	█

More than 70% of consumers are urban, tech savvy youth below 34 years.



CONSUMERS % BY GENDER

MALE	56%
FEMALE	44%

Online food delivery is gender friendly!

* Q1 & Q2 2020



INTERVIEW

RODNEY MILLS

MANAGING DIRECTOR / YES CHEF

What are the new consumer trends within the Ghanaian Online Food Industry?

I came into the food delivery industry about 4-5 years ago. There was a bit of a bridge between the customer and the restaurant which I later found out was delivery. The important part of the connection between the customer and the restaurant was price and it took me about a year to really understand the concept before I started to do deliveries regularly. Partnering with an ecommerce platform like Jumia has been of great help to restaurants in Ghana because I was understudying Jumia for sometime before I partnered with them. What I realized also was that the delivery prices were affordable, the meals that were very popular were priced with the customer in mind. Not too high and not too low. They were everyday meals that you could pretty much get by the roadside. It's taking the roadside concept and making it healthier plus speed. This was one of the main things I learnt from Jumia. After I partnered finally, it took sometime for it to hold but I realized it was the right path I took by offering good prices to customers so they can enjoy their everyday meals from the comfort of their homes.

What are the new consumer trends within the Ghanaian Online Food Industry?

It's a good and bad thing. I actually had to lay off some workers temporarily just to make sure the kitchen and entire restaurant wasn't packed because of the fear of spreading the virus. Most of the workers use public transport so we had to let them stay home to limit their exposure to the risks of contracting the virus. The burden of salaries was also a big problem which was partly shelved by the lay off. Even though patronage was low, overhead costs were also not very high. I was actually glad Yes Chef wasn't a sit down restaurant at the time because the pandemic made me really understand why delivery is important. Most customers didn't understand why we insisted on delivery but when covid-19 peaked and lockdowns were enforced, everyone sort of embraced the concept of food delivery as it helped them to stay home and stay safe while still enjoying their preferred meals. The delivery agents who are at the forefront of the delivery process have a big role to play in the success or otherwise of this market. Trainings and logistics are key when it comes to supporting them to do their jobs and I think Jumia has done very well with this. In terms of reach as well, I believe Jumia offers a platform where we can connect with many customers. Because our own customers also couldn't come in to buy their favorite meals, things would have been very bad if we relied solely on our own delivery agents. Jumia provided a fleet of trained riders who observed safety protocols and delivered food in a timely and safe way.

What are the new consumer trends within the Ghanaian Online Food Industry?

So far, I believe this industry has great potential because companies like Jumia have set the pace for others to follow and I see more online platforms coming in. This will bring competition which is good for us as restaurants and also for the consumers. Customers are becoming more comfortable due to improvement in technologies. From apps to other payment platforms, customers now sit behind their mobile devices and with a few clicks get their food delivered to them. This also means more options and variety. The next few years will be very challenging and will shape the future of the online food delivery market in Ghana. How successful it becomes will hinge on the roles played by all stakeholders.

TECH TRENDS



TOP MOBILE INTERNET COUNTRIES

% PENETRATION (2019)

	KENYA	87.2%
	TUNISIA	66.8%
	MOROCCO	64.3%
	NIGERIA	61.1%
	GHANA	48%

Kenyans are the most connected in Africa.



INTERNET PENETRATION IN GHANA

48%

est. 2020

14.7 M internet users in Ghana.



MOBILE SUBSCRIPTION IN GHANA

2019 DECEMBER

40.8 M

140% penetration; 1.7% increase from November 2019.



SMARTPHONE ADOPTION IN GHANA

2018	32 M
2019	34 M

Smartphones are booming, accelerating the Digital shift in Ghana.



CASHLESS PAYMENT

JumiaPay has accelerated the digital payment solutions.



JUMIA FOOD SOURCES OF TRAFFIC

1. MOBILE	87%
2. DESKTOP	13%

Most consumers use smartphones to place their Jumia Food orders.



APP VS. MOBILE SITE

JUMIA APP	64%
MOBILE SITE	36%

Mobile friendly, Jumia Food app is the most used by the consumers.



VIDEOS



SUPPORT RESTAURANTS



COVID-19 SAFETY MEASURES



GHANA

FOOD INDEX 2020

SOURCES

CIA world factbook
Ghana Health Service
GSMA
World Bank
Statista
Trading Economics
Ghana Statistical Service
Internet World Stats
Jumia Data Q1 & Q2

CREDITS

Bennet Otoo - Jumia Ghana

PR & Communications Manager

bennet.otoo@jumia.com

+233 246 878 763



@JumiaGhana



@JumiaGhana



@JumiaGhana

STAY SAFE

JUMIA  **FOOD**

#SupportRestaurants

