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PROCESSED FOOD MARKETING IN IVORY  
COAST, 1956-1990: DISTRIBUTION  
TECHNIQUES AND FOREIGN DOMINATION  
IN A DEVELOPING ECONOMY

A thesis submitted for a final examination for the  
degree of Doctor of Philosophy

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## ABSTRACT

The thesis examines developments in the processed food trade through stores in Ivory Coast from 1956 to 1990. Quantitative and qualitative methods are applied to data drawn from a range of sources, notably government reports, company archives, fieldwork observation and store surveys. The performances of European operated stores are contrasted with those run by Lebanese and African traders by using an adapted interpretation of Hart's (1971) informal sector theory. The thesis examines the often negative views expressed on informal sector activities in the literature and points to previously ignored weaknesses of Western style distribution techniques. It is shown that foreign domination relates not so much to exploitation by Western countries as to the preponderance of Lebanese and foreign African traders.

In addition the thesis examines the marketing strategies pursued by processed food importers and manufacturers: regional differences in distribution: the importance of price and brand to product success: and the effects of the media, western culture and economic conditions on consumption. These issues are related not only to the general framework but also to more specific theories and examined through case studies on stock cube and milk product distribution.

The thesis concludes that virtually all traders influenced by Western techniques have failed because of inflexible operating methods, excessive overheads and miscalculations on store location and consumer outreach. The advantages to Lebanese and African traders of community networks and their knowledge of consumers have been greatly underestimated. Attempts by the state and private interests to stimulate processed food demand and increase Ivorian participation in distribution have largely foundered on a failure to acknowledge the contrasting fortunes of these two sectors. Finally, these conclusions are related to other sectors in the Ivorian economy and the issue of inappropriate technology in other developing economies.

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## NOTE ON THE SPELLING OF AFRICAN NAMES

There are several different ways of spelling many ethnic group names, often depending upon the age of the source and the language in which it was written. The spellings used in this thesis are those found in Ivory Coast government sources. Thus, 'Dioula' is used rather than 'Dyula' or 'Jyula', 'Agni' rather than 'Anyi', 'Baoule' rather than 'Baule' and 'Gouro' rather than 'Guro'. The only exceptions are when African names are used in book and article titles or direct quotations, in which case the author's spelling is always retained.

## ABBREVIATIONS

|         |   |
|---------|---|
| AEH     | African Economic History  |
| ANCI    | Archives National de Cote d'Ivoire  |
| ANF-SOM | Archives National de France - Section d'Outre-Mer   |
| AOF     | Afrique Occidentale Francaise   |
| ASR     | African Studies Review  |
| AVB     | Autorité pour l'aménagement de la Vallée du Bandama   |
| BCCEER  | Bureau de Conception, de Coordination et d'Exploitation des Etudes Régionales de la République de Cote d'Ivoire       |
| BDPA    | Bureau pour le Développement de la Production Agricole  |
| CAPRAL  | Compagnie africaine de préparation alimentaire et diététique  |
| CCCI    | Chambre de Commerce de Cote d'Ivoire  |
| CDCI    | Commerce et Distribution de Cote d'Ivoire (formerly CFCI)   |
| CEA     | Cahiers d'Etudes Africaines   |
| CEGOS   | Commission générale d'organisation scientifique   |
| CFA     | Communauté Financière Africaine   |
| CFAO    | Compagnie Francaise d'Afrique Occidentale   |
| CFCE    | Centre Francaise de Commerce Extérieur  |
| CFCI    | Compagnie Francaise de la Cote d'Ivoire (now CDCI)  |
| CHOCODI | Chocolaterie confiserie de Cote d'Ivoire  |
| CICA    | Compagnie International de Commerce et d'Approvisionnement (formerly Commercial et Industrielle de la Cote d'Afrique) |
| CIPA    | Compagnie Ivoirienne de Produits Alimentaires   |
| CNCI    | Commercial du Nord de Cote d'Ivoire   |
| CODIF   | Société commerciale de diffusion  |
| CODIS   | Continental de distribution   |
| COM     | Cahiers d'Outre-Mer   |
| CUP     | Cambridge University Press  |
| DANAFCO | Danish Africa Company   |
| DSA     | DANAFCO Sarl Archives   |
| ECOWAS  | Economic Community of West African States   |

|         |  |
|---------|--|
| EIU     | Economist Intelligence Unit  |
| ETC     | European Trading Company   |
| FIDES   | Fonds d'Investissement pour le Développement<br>Economique et Social                       |
| FPI     | Front Populaire Ivoirien   |
| FWA     | French West Africa   |
| GB      | Gallina Blanca   |
| IDET    | Institut de développement économique et technique  |
| IDEX    | Ivoirienne de distribution et d'exportation  |
| IDS     | Institute of Development Studies   |
| IGT     | Institute de Géographie Tropical   |
| IHAAA   | Godogodo Revue semestrielle de l'Institute<br>d'Histoire, d'Art et d'Archéologie Africains |
| ILO     | International Labour Office  |
| IMF     | International Monetary Fund  |
| IVO     | Ivorians   |
| IVODIS  | Ivoirien de distribution   |
| JAG     | Etablissements Jean Abile-Gale   |
| JAH     | Journal of African History   |
| JAE     | Jeune Afrique Economie   |
| JMAS    | Journal of Modern African Studies  |
| LEB     | Lebanese   |
| MAU     | Mauritanians   |
| MEFCO   | Société Meroueh frères et compagnie  |
| MVA     | Manufacturing Value Added  |
| NEA     | Les Nouvelles Editions Africaines  |
| NIBA    | Non-Ivorian Black Africans   |
| NOVALIM | Nouvelle alimentation  |
| NSE     | Non-western Style Enterprises  |
| OECD    | Organisation for Economic Cooperation and<br>Development                                   |
| ORSTOM  | Office de la Recherche Scientifique et Technique Outre-<br>Mer                             |
| OUP     | Oxford University Press  |
| PAC     | Programme d'Action Commerciale   |
| PDCI    | Parti Démocratique de Cote d'Ivoire  |
| PNCI    | Programme National d'assistance aux Commerçants<br>Ivoiriens                               |

|         |  |
|---------|--|
| PROSUMA | Société ivoirienne de promotion de supermarché                                       |
| RIM     | Revue Ivoirienne de Marketing  |
| RTM     | Revue Tiers-Monde  |
| SAA     | Syndicat Agricole Africain   |
| SACI    | Société Africain de Commerce et d'Industrie  |
| SAFA    | Société Africain de Fabrications Alimentaires  |
| SAVE    | Système d'Achat et de Vente Economique   |
| SCIMPEX | Syndicat des commerçants importateurs, exportateurs et distribution de Cote d'Ivoire |
| SCOA    | Société Commerciale d'Ouest Africain   |
| SDLP    | Société de Distribution de Produits Laitiers   |
| SEDES   | Société d'Etudes pour le Développement Economique et Social                          |
| SIALIM  | Société des industries alimentaires et des produits laitiers                         |
| SIDECO  | Société ivoirienne de distribution économique  |
| SOCOCE  | Société commerciale de centre ouest  |
| SODICO  | Société de distribution et de commerce   |
| SODIREP | Société de distribution et de représentation   |
| SYNACCI | Syndicat national des commerçants de Cote d'Ivoire                                   |
| TCR     | Taxe Commerciale Reduit  |
| UGMCACI | Union des Gerants-Mandataires de Chaine Avion Cote d'Ivoire                          |
| UN      | United Nations   |
| UNACI   | Union National des Actionnaires de Cote d'Ivoire                                     |
| UNCTC   | United Nations Centre on Transnational Corporations                                  |
| WAHA    | West Africa Holdings Archives  |
| WSE     | Western Style Enterprises  |



## **CHAPTER 1**

### **INTRODUCTION**

The processed food trade in Ivory Coast is a neglected topic. This thesis focuses on two main issues in the development of the trade: the history of Western and non-Western distribution techniques, and the foreign domination of store ownership. Although only a small proportion of goods traded, the processed food sector provides a revealing example of the most controversial issue in Ivorian studies, the role of foreigners in the economy. In so far as many other developing countries play host to a variety of foreign interests, this thesis may also prove significant as a study that will hopefully prompt a re-evaluation of the role and effects of foreign traders, technologies and products in general.

1956 rather than 1960, the date of independence, was chosen as the starting point for the thesis. Unlike many other African states, Ivory Coast did not change the direction of economic policy dramatically upon achieving independence. In fact, continuity was the key theme and this stretched into the political arena as well. Consequently, there was not the upheaval in the commercial sector experienced by many other African countries. There was therefore no good reason for choosing 1960 as the starting point. 1956, on the other hand, was the year that most accurately represented the beginning of a new era in the commercial sector; the first supermarket and the first chain stores appeared, while the diversification of trading company interests gathered pace.

For the purpose of this thesis, a store was defined as possessing the following features. First, it had a permanent physical structure which could not be transported from one area to another from day to day, i.e. it had walls, a roof and shelving (usually made of wood, concrete and/or corrugated sheeting). Second, its primary or at least equal function was to sell goods as opposed to meals or snacks prepared on the premises. Finally, the outlet stocked a reasonable quantity of processed foods as defined below, reasonable meaning more than just one or two tins of a couple of

items. Generally speaking, there was little difficulty in distinguishing these outlets in the field. For the rest, market traders, stall owners, traders using tables (hereafter referred to as *tabliers*), restaurants, hotels, bars and *maquis* (restaurant-bars) were not part of the thesis. Nor, for the most part, were kiosks as the vast majority served only meals.

There were two basic reasons for confining the study to the outlets as defined above. The first was that, whilst much attention had been paid to West African market traders and hawkers by Polly Hill and others,<sup>1</sup> relatively little had been written about stores. This seemed a particularly glaring academic omission in the light of the second reason which was that, of all types of traders, the African component of stores was more directly faced by European and Lebanese competition than any other group of traders and thus provided an illuminating case study of the respective advantages and disadvantages of the different cultural groups.

The processed foods discussed were mostly sold either in plastic or glass containers, tins or packets (e.g. biscuits, tea). Excluded were all items not sold to the consumer in some form of packaging even if, as was often the case with flour, sugar, salt, cooking oil and rice, the retailer bought the product packaged. Also excluded were raw materials imported as inputs for local manufacturing (e.g. milk powder in sacks) and 'ready to drink' beverages such as coca-cola, wine, spirits and beer because these items were often distributed to different types of outlets through different channels of distribution and could not adequately be studied within the confines of this thesis.

The definition of processed food was thus fairly narrow for a number of reasons. A discussion of all processed food would have enlarged the scope of the thesis to unmanageable proportions and goods such as rice and flour were already the object of close

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<sup>1</sup> P.Hill, 'Markets in Africa', *JMAS*, 1, 4 (1963), pp.441-453; P.Bohannon and G.Dalton (eds.), *Markets in Africa* (Northwestern University Press, Evanston, 1962); M.Ford, 'Kola Production and Settlement Mobility Among the Dan of Nimba, Liberia', *AEH*, 20 (1992), pp.51-63.

scrutiny by both the academic community and by national and international bodies. Processed food as defined above, whilst increasingly discussed in terms of local manufacture, was an almost totally neglected area when it came to marketing and non-elite consumption patterns. For local production to succeed, it is essential to know how to satisfy and increase demand to levels which make manufacturing viable in Ivory Coast.

Foreign domination was discussed in relation to stores, processed food and distribution techniques. It was also an important theme in the theoretical frameworks discussed below as well as in virtually every book or article ever written about the Ivorian economy. This most controversial of issues was as evident in the processed food trade as anywhere but had not yet been dealt with in any depth in relation to this trade. In mentioning the foreign presence in outlet ownership, government and other sources rarely failed to emphasise its extent but at the same time rarely provided answers as to why there was such an extensive foreign dominance. This lack of analysis was most evident in searching for the colonial and especially precolonial origins of this phenomenon, an omission which Chapter Two seeks to address.

The rest of this chapter is divided into four sections. The first presents a general picture of Ivorian political, economic and demographic development, focusing on the period 1956 to 1990. This is followed by the presentation of certain conceptual frameworks through which the material presented in the thesis can be related to issues of wider interest. These include the formal-informal sector debate, the problem of distribution, the development of entrepreneurship, foreign taste acquisition and various theories used for Chapter Two, the background chapter, many of which were still relevant in 1990. The third section concerns the methodology and sources used whilst the final section outlines the contents of the chapters which follow.

## 1.1 INTRODUCTION TO IVORY COAST

Declared a colony of France in 1893, Ivory Coast had long been a sparsely populated territory inhabited by some sixty ethnic groups in two different vegetation zones, the southern forest and northern savannah.<sup>2</sup> French expansion into the colony was slow at first but the outbreak of the Second World War meant France required the resources of her overseas territories. This led to a more effective exploitation of the colony during which coffee and cocoa emerged as the principal exports. Whilst most production came from Ivorian small-holders, the powerful French settlers, who had exploited opportunities presented by the limited spread of an indigenous commercial class, were favoured with supplies of forced labour from the administration. The role of the future President Felix Houphouet-Boigny, a planter himself, and his Parti Démocratique de Cote d'Ivoire (PDCI) in the abolition of this widely hated measure in 1946 greatly assisted their rise to power. Since 1950, the Ivorian political elite has pursued a path of close co-operation with France, symbolised by the decision to remain in the French franc zone after independence in 1960.<sup>3</sup>

The political stability provided by the one party system and the president's paternalistic style enabled a coherent and continuous economic policy based on export led growth and, from the early 1970s, import substitution and diversification. Economic success in turn helped to maintain political stability even into the 1980s when the economy went into a recession from which, by 1990, it had yet to emerge despite a brief recovery in the mid 1980s. This dual policy was pursued with the help of large-scale foreign investment encouraged by generous incentives and liberal controls on such areas as the repatriation of profits. At the same

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<sup>2</sup> D.Bollinger, Le marketing en Afrique, tome 1: la Cote d'Ivoire, (CEDA, Abidjan, 1977), pp.13-19.

<sup>3</sup> S.Amin, Le développement du capitalisme en Cote d'Ivoire (Minuit, Paris, 1967), pp.58-60; M.Gbetibouo and C.Delgado, 'Lessons and Constraints of Export Crop-led Growth: Cocoa in Ivory Coast'. In I.Zartman and C.Delgado (eds.), The Political Economy of Ivory Coast (Praeger, New York, 1984), p.123; J.Cartwright, Political Leadership in Africa (Croom Helm, Beckenham, 1983), pp.99-109; R.Mundt, Historical Dictionary of the Ivory Coast (Scarecrow Press, Metuchen, 1987), pp82-86.

time as opting for a capitalist path to development, the state also played a major role through the agricultural marketing board, the Caisse de Stabilisation et de Soutien des Produits Agricoles (CSSPA) as well the parastatals which were run with the assistance of French personnel. Ties with France remained close at all levels: the CFA franc continued to be tied to the French franc, private French investors predominated in the formal sector, there was a French military base and French cultural influences were evident in most walks of life, especially amongst the political and economic urban elite.<sup>4</sup>

The most visible result of these policies was the remarkable growth rate of the economy, an average of 7.7% per annum from 1960 to the end of the 1970s.<sup>5</sup> The rapid population growth, from under three million in 1950 to over twelve million in 1990,<sup>6</sup> was partly due to migrants from neighbouring territories attracted by the booming economy. At the same time, the urbanisation level rose to nearly 50% by 1990<sup>7</sup> and investments made in linking Ivory Coast's rapidly growing towns with all-weather roads (see Maps 1,2 and 3). When compared to other African economies and especially the faltering ones of neighbouring Ghana and Guinea, the economic growth statistics are undoubtedly impressive.<sup>8</sup> However, the growth rate for most of the 1980s was negative,<sup>9</sup> and indeed the deterioration of the economy's health dated back to the mid 1970s with the oil price shock and financial

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<sup>4</sup> M.A.Cohen, Urban Policy and Political Conflict in Africa (University of Chicago Press, Chicago, 1974), pp.24-28; H.S.Marcussen, 'The Ivory Coast Facing the Economic Crisis'. In J.Carlsson (ed.), Recession in Africa (Nordiska Afrikainstitutet, Uppsala, 1983), pp.1-27; B. Campbell, 'State and Capitalist Development in the Ivory Coast'. In P.Lubeck (ed.), The African Bourgeoisie (Lynne Rienner, Boulder, 1987), pp.281-300; L.K.Mytelka, 'Foreign Business and Economic Development', pp.149-173, and I.W.Zartman and C.Delgado (eds.), 'Introduction', p.13. Both in Zartman and Delgado, Political Economy.

<sup>5</sup> Marcussen, 'Economic Crisis', p.2.

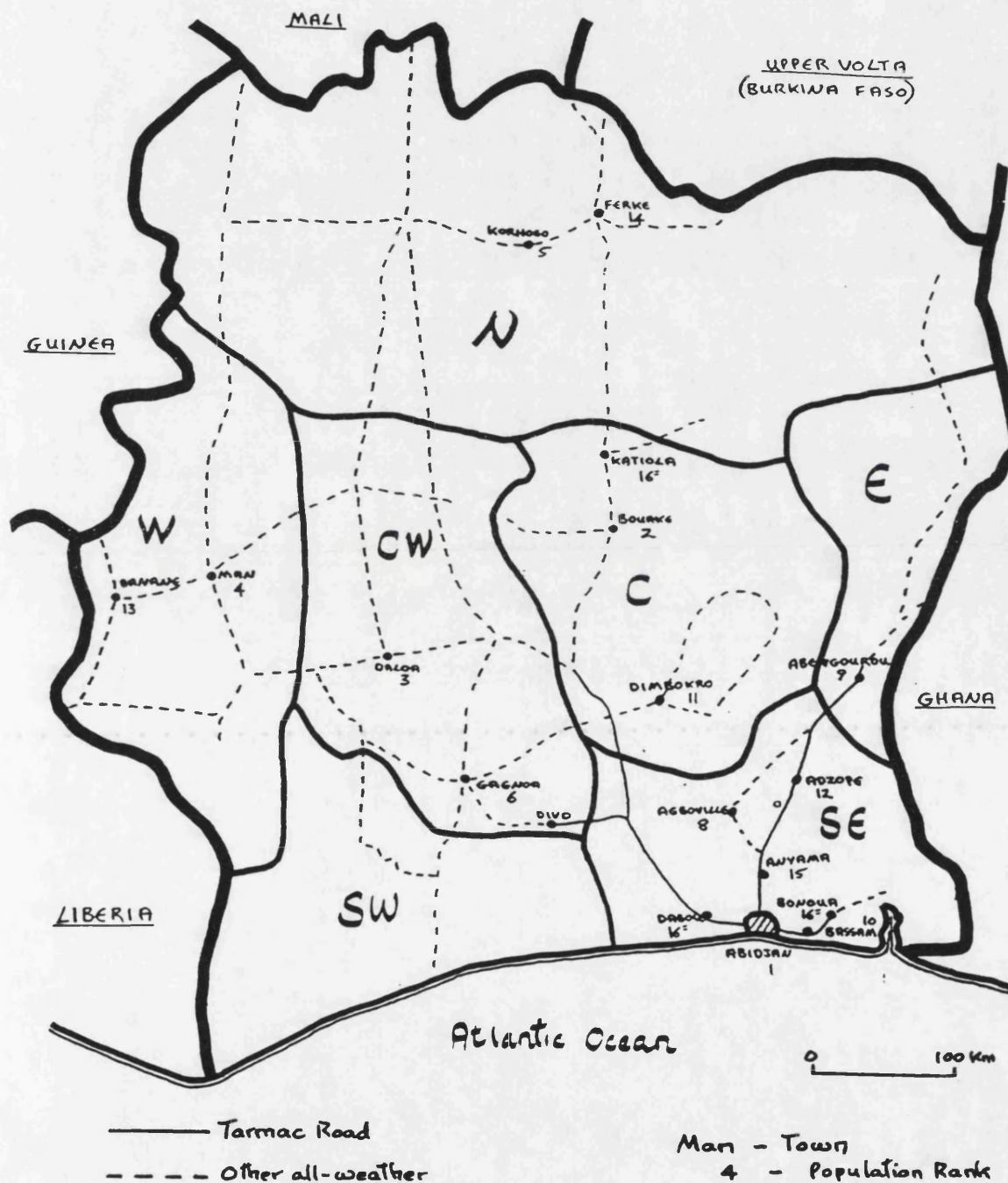
<sup>6</sup> World Bank, World Tables 1983, vol 2, p.47; EIU, Cote d'Ivoire Country Report (No.3, 1991), p.3.

<sup>7</sup> EIU, Report (No.3, 1991), p.3.

<sup>8</sup> For comparisons, see World Bank, World Tables 1987.

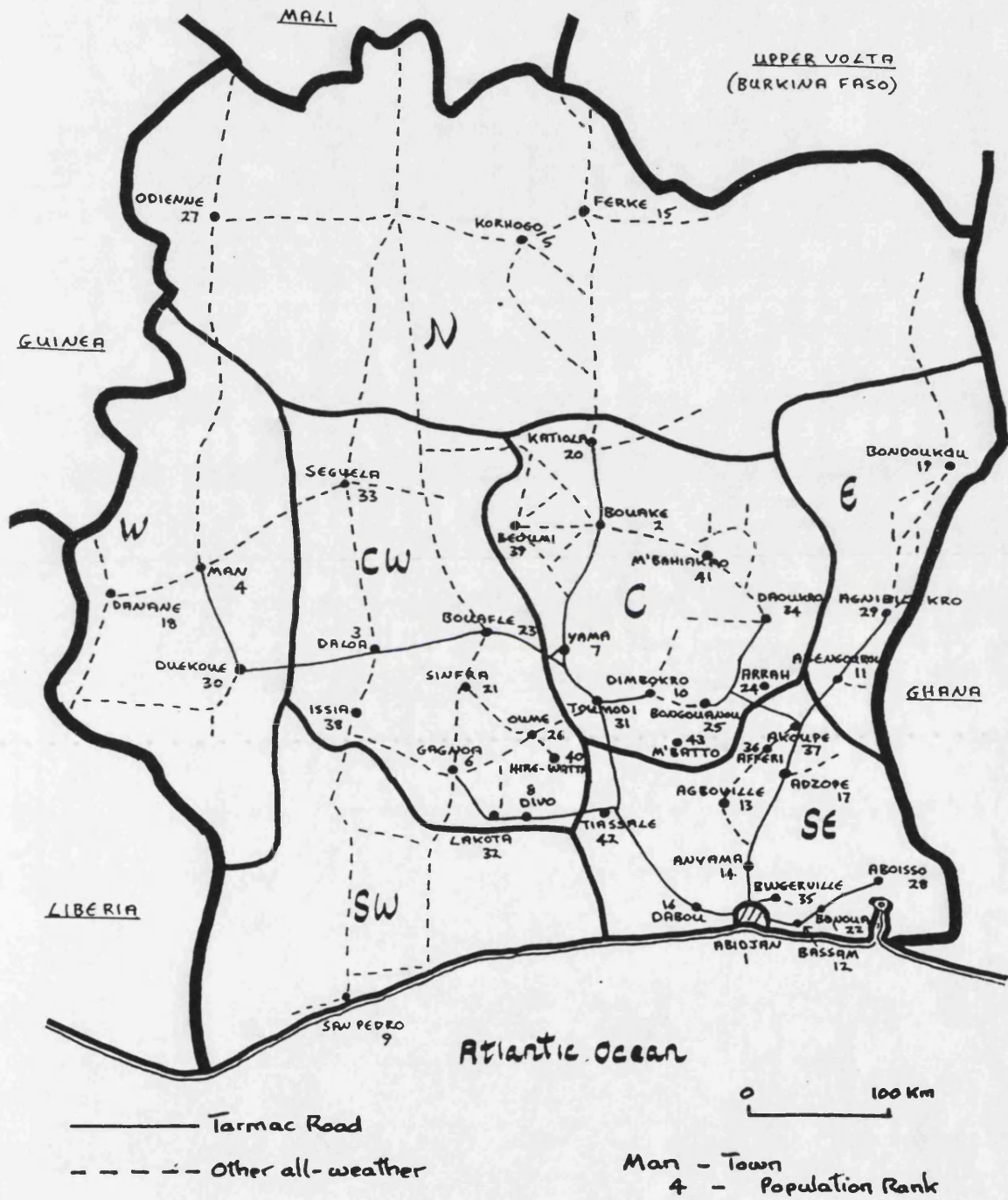
<sup>9</sup> Ibid; EIU, Report (No.1, 1991),p.3.

MAP 1: TOWNS WITH A POPULATION OVER 10,000 AND PRINCIPAL ROADS, IVORY COAST 1965



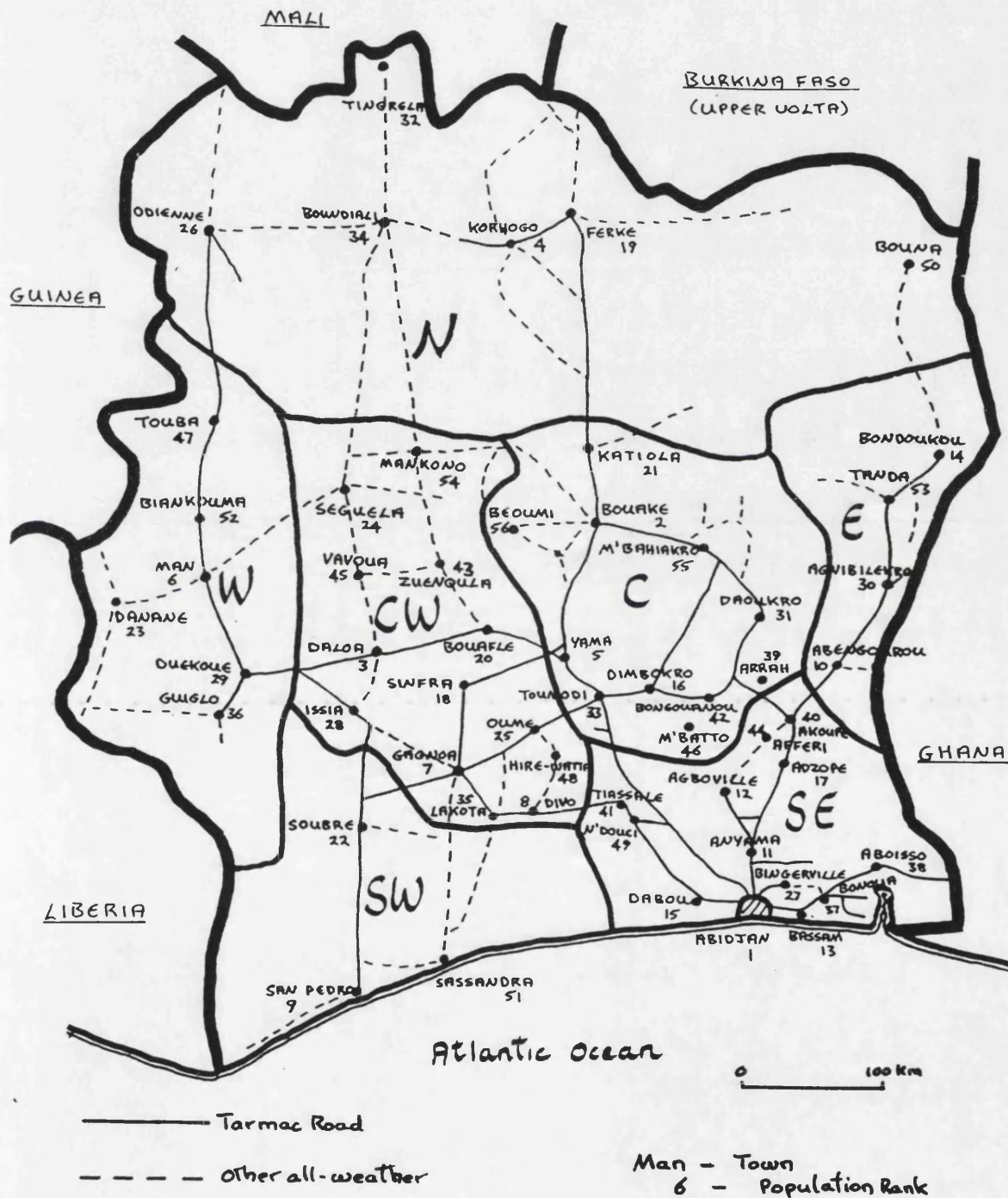
Sources: RCI, Population de la Cote d'Ivoire (Ministère de l'Economie et des Finances, Abidjan, 1984); Fieldwork: discussion with official at Ministry of Transport (August 1990); ORSTOM and IGT, Atlas de Cote d'Ivoire (Ministère du Plan, Abidjan, 1979).

MAP 2: TOWNS WITH A POPULATION OVER 10,000 AND PRINCIPAL ROADS, IVORY COAST 1975.



Sources: RCI, Population; Fieldwork: discussion with official at Ministry of Transport; ORSTOM and IGT, Atlas.

MAP 3: TOWNS WITH A POPULATION OVER 10,000 AND PRINCIPAL ROADS, IVORY COAST 1988.



Sources: RCI, Recensement 1988; Fieldwork: discussion with official at Ministry of Transport and with salesmen: observation; ORSTOM and IGT, Atlas.



miscalculations in the 1976-80 five year plan.<sup>10</sup> The evolution of GDP and GDP per capita respectively (1977 constant values) showed that the former grew up to 1980 whilst the 1990 per capita figures indicated that the average Ivorian was worse off than his counterpart in 1965.<sup>11</sup> The increase in population and, until 1980, per capita GDP combined to stimulate large increases in imports which rose from CFA 265 billion in 1966 to CFA 549 billion in 1976 and CFA 789 billion in 1986 (1985 constant values).<sup>12</sup> For the same years exports amounted to CFA 320 billion, CFA 600 billion and CFA 1,269 billion respectively, leaving a substantial balance of payments surplus.<sup>13</sup> Coffee and cocoa, the two principal exports, generally accounted for around 60% of the total whilst imports were dominated by food, construction materials, vehicles and machinery and petroleum. Ivory Coast's principal trading partner since 1945 has been France, especially with respect to imports though the proportion has declined over the years to 31 % of imports and 16% of exports (the latter figure equal with Holland) in 1988.<sup>14</sup>

The government blamed international speculators for the decline in world prices of coffee and cocoa from 1978 to 1981 and since 1985 which sent the economy into a deep recession. With farmers being paid less, cocoa production levelled off after doubling between 1972 and 1982. At the same time as export revenues began to decline, extensive borrowing to finance industrialisation and other projects such as sugar complexes occurred just after the oil boom when interest rates were low (long term loans

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<sup>10</sup> Zartman and Delgado 'Introduction', pp.14-18; Marcussen, 'Economic Crisis', pp.4-6; Y.Fauré, 'Cote d'Ivoire: Analysing the Crisis'. In D.B.Cruise O'Brien, J.Dunn and R.Rathbone (eds.), Contemporary West African States (CUP, Cambridge, 1989), p.59.

<sup>11</sup> Calculated from IMF, International Statistics Yearbook 1990 ; EIU, (No.1, 1991); B.A.den Tuinder, Ivory Coast: The Challenge of Success (World Bank, New York, 1978); UN, Demographic Yearbook: Historical Supplement (UN, 1979); World Bank, World Tables 1987; EIU, Cote d'Ivoire Country Profile 1991-92, p.2.

<sup>12</sup> Calculated from import and exchange rate figures in World Bank, World Tables 1987, pp.114-115; UN, African Statistical Yearbook 1977; EIU, Profile 1991-92, p.2.

<sup>13</sup> Ibid.

<sup>14</sup> EIU, Report (No.2, 1991), p.3.

quadrupled between 1973 and 1981). With the failure to promptly rein in spending plans, and spiralling interest rate increases, the ratio of debt service to exports increased from 10.6% in 1977 to 29.1% in 1981 and 48.5% in 1986. The decline of the country's economic fortunes led to increasing political instability and, in October 1990, multiparty elections were held after 30 years of one party state.<sup>15</sup>

The path to development adopted by the Ivorian government has been the subject of much theoretical and empirical debate between two broad schools of thought, the liberal and the radical.<sup>16</sup> Prominent in the latter, and the earliest major critic of Ivorian development strategy, was Samir Amin whose prediction that the country would reach a crisis point because of limitations in economic policy<sup>17</sup> has proved correct though much later than he predicted and not for the reasons he envisaged. Bonnie Campbell, in numerous publications, and Lynn K Mytelka were other prominent radical critics, the former writing on the dominant class<sup>18</sup> and the latter about what she saw as inadequate intersectoral linkages and excessive foreign investment.<sup>19</sup>

Mytelka assembled an impressive array of statistics to illustrate the extent of foreign involvement and to prove her point that, in the words of Woods, "past patterns of accumulation have run their gamut".<sup>20</sup> She concluded that,

the interests of international capital, . . . the fluctuations of world prices and the contraction or expansion of external markets continue to be decisive in shaping the pattern of Ivorian economic growth.<sup>21</sup>

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<sup>15</sup> EIU, Profile 1991-92, p.4; EIU, Report (various issues 1989-92); Marcussen, 'Economic Crisis', pp.4-6; Fauré, 'Analysing', pp.59-73; Zartman and Delgado, 'Introduction', p.17.

<sup>16</sup> D.Woods, 'State Action and Class Interests in the Ivory Coast', ASR, 31, 1 (1988), pp.93-94.

<sup>17</sup> Amin, Capitalism, pp.265-281.

<sup>18</sup> In, for example, Campbell, 'Development', pp.281-300.

<sup>19</sup> Mytelka, 'Business', pp.149-173.

<sup>20</sup> Woods, 'Action', p.101.

<sup>21</sup> Mytelka, 'Business', p.172.

Whilst 'the interests of international capital' were very evident in internal distribution, latter chapters show that their influence on this sector was far from decisive.

Campbell, like Amin, stressed the 'continuing dominance of the metropole' which, in the Ivorian case, principally meant France. This involved not only private interests but also the currency link between the CFA franc and the French franc and also defence and aid agreements which were "favourable to the perpetuation of a particular orientation to economic growth and, to this end, the reinforcement of a certain group of local interests,"<sup>22</sup> i.e. the ruling elite. Whilst the evidence for this interpretation regarding the economy in general is strong, it will be shown that such an interpretation is more difficult to apply to the distributive trades.

Campbell's critical interpretation of the French role was not shared by Faure and Médard's 'liberal' interpretation. They contended that Ivory Coast has benefited from its dependent relationship with France and that Ivorian interests were not necessarily sacrificed in the interests of foreign capital. Their view was that: "*si l'expansion a bénéficié en première lieu à la strate supérieure des revenus, elle a produit un enrichissement absolu de l'ensemble des couches sociales.*"<sup>23</sup> This partly contradicted Campbell who stated that "the Ivory Coast state has not undertaken any measures that would displace monopolies enjoyed by foreign capital,"<sup>24</sup> a claim she backed up convincingly with statistical evidence regarding lack of Ivorianisation in the commercial and industrial sectors. The state has long claimed that Ivorianisation was a key issue in the distributive trade but later chapters indicate that little effective progress was made.

Whilst the 'liberal' interpretation was more favourable to the Ivorian strategy, there was much criticism of the inequitable

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<sup>22</sup> Campbell, 'Development', p.284.

<sup>23</sup> J-A.Fauré and J-F.Médard, 'Classe dominante ou classe dirigeante?'. In J-A.Fauré and J-F.Médard (eds.), Etat et bourgeoisie en Cote d'Ivoire (Karthala, Paris, 1982), pp.139-140.

<sup>24</sup> Campbell, 'Development', p.287.

distribution of income.<sup>25</sup> Further, den Tuinder's report for the World Bank in 1978<sup>26</sup> pointed to potential problems regarding the country's overtly favourable attitude towards foreign capital and Faure<sup>27</sup> correctly criticised the sugar fiasco which involved foreign expertise which he admitted "clearly represents the kind of risk engendered by the basic orientations of the Ivorian system".<sup>28</sup> In summary, there is a wide range of interpretations regarding the Ivorian 'miracle'. At first glance, foreign domination of the internal trade sector appeared to reflect the economy as a whole but on closer inspection the thesis will show that neither the liberal nor radical schools suffice to explain many of its characteristics.

## 1.2 CONCEPTUAL FRAMEWORKS

### 1.2.1 The Formal-Informal Sector Debate

The formal-informal sector literature holds many attractions for the study of entrepreneurs for it is both flexible and practically inclined. The distinction between these sectors may be applied to general economic activity or to a specific area, such as trade. The following paragraphs will first outline the main points of the debate and then refine it for the purposes of this study but it should be borne in mind that, possibly other than western-style training in commercial practices, there was no one factor which distinguished all traders in one sector from all those in another. Various other terms have been used by different writers, such as organised vs. independent and modern vs. traditional, but all proved, on closer inspection, essentially inappropriate. It therefore seemed easier and more profitable to use Hart's outline as a starting point from which a more specific terminology could be developed in relation to stores.

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<sup>25</sup> See, for example, M.Cohen, Policy, pp.26-27.

<sup>26</sup> den Tuinder, Challenge, pp.190-193.

<sup>27</sup> Fauré, 'Analysing', p.68.

<sup>28</sup> Ibid.

The idea of the informal sector was first put forward in 1971 by the anthropologist Keith Hart in his study of urban employment in one Accra slum.<sup>29</sup> For Hart, the most important difference between the two sectors was “that between wage-earning and self-employment”.<sup>30</sup> He characterised the formal sector as being large scale in operation with formally acquired skills, market protection, difficult entry, corporate ownership, the use of capital intensive technology and a considerable reliance on overseas resources. This definition encompassed such activities as large scale industries, government and administrative employment and other regular salaried occupations.

The informal sector Hart characterised as being small scale with informally acquired skills, no market protection, easy entry, family or individual ownership, use of local technology and dependence on local resources. Their activities included small scale manufacturing, street hawking, shoe shining and prostitution. Hinderink and Sterkenburg’s observations of Cape Coast in Ghana were very similar though they distinguished more between small scale African traders and larger operators, pointing to such differences as the latter sometimes having cash registers, lorries and some bookkeeping.<sup>31</sup>

The view of the International Labour Organisation (ILO) was that the informal sector was of considerable benefit as it provided the opportunity to acquire skills and accumulate capital whilst not needing overseas investment. Thus the ILO wanted governments to encourage this sector as a potential catalyst for autonomous growth. Clearly, in this view, the relationship between the two sectors is benign:<sup>32</sup> the informal sector is complementary to the economy as a whole as well as integrated into it. If this was true, wholesalers and retailers should, over time, have accumulated

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<sup>29</sup> K.Hart, ‘Informal Income Opportunities and Urban Employment in Ghana’, *IMAS*, 11, 1 (1973), pp.61-89.

<sup>30</sup> *Ibid.*, p.68.

<sup>31</sup> J.Hinderink and J.J.Sterkenburg, ‘Income Inequality under Changing Urban Conditions in Tropical Africa’, *TESG*, 69, 1/2 (1978), p.60.

<sup>32</sup> S.V.Sethuraman, ‘The Urban Informal Sector and Development Policy’. In S.V.Sethuraman (ed.), The Urban Informal Sector in Developing Countries, (ILO, Geneva, 1981), pp.28-47.

enough capital to turn themselves into more powerful entrepreneurs with a more dominant position in the distribution trade, thus giving them greater leverage over importers and manufacturers. Alternatively, some should have made their way into the formal sector perhaps as employees of foreign firms or owners of their own legally registered manufacturing concerns.

One important aspect given less attention than it merits is kinship. Kennedy saw this as putting constraints on indigenous activities in the informal sector. He argued that low capital requirements and ease of entry, two advantages of the informal sector which assistance from relatives may further ease when setting up an enterprise, may create difficulties for the more dynamic businessmen because of labour instability and competition.<sup>33</sup> Kennedy, like Frankman and Charle and Cohen, also pointed to some advantages of kinship like easy access to advice and credit.<sup>34</sup>

There is also the political dimension. It has been suggested that governments have little to fear from the informal sector because its extreme diversity and informal structure make political organisation and trade unionism very unlikely. Rita Cruise O'Brien suggested that, in Senegal, politicians seemed content to give the informal sector Lebanese a fairly free rein as an alternative to a more demanding interest group in the form of an organised local bourgeoisie.<sup>35</sup> Given the Ivorian government's repressive attitudes to opposition to the ruling PDCI and its attempts strictly to control unions in the formal sector,<sup>36</sup> the relevance of this theory may well be considerable but, equally, it is difficult to prove.

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<sup>33</sup> P.Kennedy, African Capitalism (CUP, Cambridge, 1988), pp.136-147; P.Kennedy, 'Cultural Factors Affecting Entrepreneurship and Development in the Informal Economy in Ghana', IDS Bulletin, 8, 2 (1976), pp.17-21.

<sup>34</sup> M.Frankman and E.Charle, 'Employment in the Service Sector in Sub-Saharan Africa', IMAS, 11, 2 (1973), pp.201-210; A.Cohen, Custom and Politics in Urban Africa (Routledge and Kegan Paul, 1969), pp.7-20.

<sup>35</sup> R.Cruise O'Brien, 'Lebanese Entrepreneurs in Senegal: Economic Integration and the Politics of Protection', CEA, 15, 57 (1975), p.112.

<sup>36</sup> M.Cohen, Policy, p.107.

Bates, in writing about the role played by African governments in the agricultural sector, has argued that organised political interests such as labour, industry and government agencies were the beneficiaries of government intervention and favouritism at the expense of small scale farmers whilst large farmers, often politically organised and well connected, were 'neutralised' by subsidies.<sup>37</sup> Taking the organised interests to be the formal sector, Lebanese traders to be the counterparts of the large farmers, and informal sector retailers to correspond to small farmers, the thesis examines the relevance of this argument to the Ivorian commercial sector. More recently, and relating specifically to the Ivorian commercial sector, Boone has asserted that the state ignored established African traders in favour of promoting the interests of the political elite.<sup>38</sup> She argued that the principal beneficiaries of state intervention were the "politically-powerful Ivorian *rentiers* and the managers of state-owned trading companies."<sup>39</sup> Assessing the arguments of Boone, Cruise O'Brien and Bates should help to throw light upon the thinking behind government policy and the ways in which patronage, influence peddling and favouritism operate in the commercial sector as well as the economy in general.

On the basis of Hart's sectoral definitions, traders were placed into one of two groups. Here, the formal sector comprised supermarkets, wholesale and retail chain stores owned and/or provided with technical assistance by foreign firms or the state. The informal sector comprised the rest, which was also to say the vast majority, of outlets. In these the state took no official interest and made little effort to either encourage or hinder. The main problem with this theory was Hart's emphasis on the distinction between formal and informal income opportunities with the other characteristics more secondary. This thesis will show that, for

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<sup>37</sup> R.H.Bates, 'Governments and Agricultural Markets in Africa.' In R.H.Bates (ed.), Toward a Political Economy of Development (University of California Press, Berkeley, 1988), pp.331-358.

<sup>38</sup> C.Boone, 'Commerce in Cote d'Ivoire: Ivorianisation without Ivorian Traders', JMAS, 31, 1 (1993), pp.67-92.

<sup>39</sup> Ibid, p.91.

stores, it was the “secondary” characteristics which were the more relevant and accurate distinction.

From the above, two new terms were adopted, Western Style Establishments or WSEs and Non-Western Style Establishments or NSEs. WSEs were outlets managed or operated by traders who sought to imitate trading practices and theories in Europe and America as closely as they could. NSEs, on the other hand, whilst perhaps imitating some superficial characteristics of WSEs, evolved either in the trading environment in which they operated or one where western commercial practices had little influence on them. This thesis will compare and contrast the two categories of outlets and seek to determine, amongst other things, which outlets best weathered the decline in the country's economic fortunes during the 1980s.

### 1.2.2 The Problem of Distribution

Distribution has been frequently singled out as a major factor holding back economic development in Third World countries, the argument basically being that demand is hampered by the high cost of distribution which holds back growth. This view regards indigenous distribution channels as long, fragmented and inefficient and sees a need for the implementation of modern marketing techniques in Third World countries.<sup>40</sup> For example, storage facilities are poor partly due to lack of capital. Further, it has been frequently argued that there are too many intermediaries between the manufacturer or importer and the consumer, each intermediary adding to the final price as he seeks to cover his costs and make a profit. Hence the theory that the

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<sup>40</sup> G.H.Wadinambarachi, 'Theories of Retail Development', Social and Economic Studies, 21,4 (1972), pp.391-401; E.Anderson, ' "Retail Pull": a Source of Economic Stability and Growth for Developing Nations', Journal of Retailing, 46, 4 (1970-71), pp.24-30; E.Kaynak and S.Cavusgil, 'The Evolution of Food Retailing Systems: Contrasting the Experiences of Developed and Developing Countries', Journal of the Association of Marketing Studies, 10, 3 (1982), pp.249-267; J.Kinsey, Marketing in Developing Countries (Macmillan, 1988), p.44; E.W.Cundiff and M.Hilger, 'The Consumption Function: Marketing's Role in Economic Development', Management Decisions, 20, 4 (1982).



modernisation of retail and wholesale structures and practices will stimulate demand by increasing efficiency and thereby lowering prices, as well as increasing consumer awareness of available products. Many of these beliefs are typified by Anderson's contention that:

The merchandising and promotional effort introduced by an aggressive retailing firm would augment the demand for traditional as well as new products and stimulate higher levels of consumption spending.<sup>41</sup>

Mittendorf, in 'The Challenge of Organising Food Marketing Systems in Developing Countries',<sup>42</sup> offered a model of the changing patterns of retailing during the course of economic development. His three stages of low, medium and high levels of development show public retail markets and neighbourhood shops equally dominant in the first stage with supermarket chains barely in the picture. The second stage, that of medium level development, shows the importance of the role of neighbourhood shops unchanged with supermarket chains gaining at the expense of public retail markets. In the final stage hypermarkets and integrated and associated chains are as important as the other two sectors combined with retail markets now of little significance and neighbourhood shops declining for the first time. On wholesalers, Mittendorf sees wholesaling and retailing functions done by one merchant in the first stage (giving Tropical Africa as an example) whilst the second stage sees the rise in importance and number of wholesalers and the third their decline. This three stages of development theory can be examined for its validity as a predictor for what patterns of Ivorian distribution will emerge in the future by examining, amongst other things, the closeness of the fit between the theoretical first and second stages and Ivorian reality over the past forty years.

Whilst accepting that inadequate distribution adversely affects economic development, other writers, mostly more recent, have

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<sup>41</sup> Anderson, 'Retail Pull', p.28.

<sup>42</sup> Explained in Kaynak and Cavusgil, 'Food Retailing', pp.257-258, and E.Kaynak, Marketing and Development, (Praeger, New York, 1986), pp.100-102.

been more inclined to acknowledge the problems arising from attempts to transfer technology developed for one environment into what is often a very different third world situation. Savitt's summary of the above arguments as "change is regarded as positive, especially when the innovation comes from western economies"<sup>43</sup> may over simplify a little but nonetheless neatly highlights their central theme. In the case of supermarkets it has been pointed out that this particular technology is inappropriate in many areas because of low outreach i.e. consumers are often not prepared to travel long distances to make food purchases.<sup>44</sup> Samiee argued that:

Elements that contributed to the popularity of supermarkets in developing nations are either non-existent or unimportant in developing countries..... Small retail shops are generally family owned..... Labour costs which are very high in developed countries can be negligible for these retailers.<sup>45</sup>

In Ivory Coast, the rapid growth in population, urbanisation and, until 1980, income per head in real terms was a powerful motivating force behind efforts to "modernise" distribution channels. Western interests doubtless hoped to capture the lion's share of the retail and wholesale sectors and the state joined them in believing that modern distribution technologies would increase efficiency in the channels of distribution and achieve price uniformity throughout the country. The results of these efforts and their consequences on the internal trade sector in general are assessed through the theories presented above.

### **1.2.3 Theories on the Development of Entrepreneurship**

The theories presented in this section deal with the advantages held by some commercial groups and why they emerged as successful traders whilst others failed to develop a significant role

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<sup>43</sup> R.Savitt, 'Retail Change and Economic Development'.In A.Findlay, R.Paddison and J.Dawson (eds.), Retailing Environments in Developing Countries (Routledge, 1990), p.17.

<sup>44</sup> A.Goldman, 'Outreach of Consumers and the Modernisation of Urban Food Retailing in Developing Countries', Journal of Marketing, 38 (1974), pp.9-11.

<sup>45</sup> S.Samiee, 'Impediments to Progress in Retailing in Developing Nations'. In Findlay et al (eds.), Retailing, p.32.

in this tertiary activity. The issues explored by Akeredolu-Ale and Cohen are relevant to the precolonial, colonial and postcolonial eras whilst those of Hopkins, Bauer and Kennedy concentrate on the colonial and postcolonial periods.

Cohen, in his study of the Hausa, remarked that the domination of particular trading groups in certain areas has long been a common phenomenon.<sup>46</sup> The Mande Islamic traders in Ivory Coast, the Dioula, are one such example. He argued that

the trade involves difficult technical problems which, in the pre-industrial conditions prevailing in these areas, have been most successfully overcome when men from the same ethnic group controlled all, or most, of the stages of the trade in specific commodities.<sup>47</sup>

Cohen cited three technical problems in trade: information, speed and trust. Using the examples of cattle and kola,<sup>48</sup> he demonstrated how "securing the continuous and rapid exchange of information between traders in the various centres about conditions of supply and demand" <sup>49</sup> were essential to successful trading. Similarly, speed in transport and transactions was also crucial because of the perishable nature of many goods whilst trust was necessary for arranging credit facilities.<sup>50</sup>

A three point model developed by Akeredolu-Ale,<sup>51</sup> although intended to explain the prominence of the Ijebu in Nigerian trade during the colonial and post colonial eras, may also be usefully applied to explaining the absence of indigenous Ivorian traders from the precolonial years onwards. On the first point, most opportune location, the Ijebus' geographical location made them ideal for the role of middlemen between the coast and the hinterland. Their position was further enhanced in this respect by

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<sup>46</sup> A.Cohen, Custom, p.191.

<sup>47</sup> Ibid, p.7.

<sup>48</sup> Ibid, pp.17-19.

<sup>49</sup> Ibid, p.17.

<sup>50</sup> Ibid, pp.19-20.

<sup>51</sup> E.O.Akeredolu-Ale, 'A Sociohistorical Study of the Development of Entrepreneurship among the Ijebu of Western Nigeria', ASR, 16, 3 (1973), pp.347-364.

the location of three of the four European trading posts in their region.

The second point, economic necessity, was that the Ijebu saw trade as their only real chance of achieving prominence in an economic sphere and as the best means of making a living. The Ijebu "have never enjoyed a high reputation as farmers", "were not favourably placed with regard to the business in cash crops"<sup>52</sup> and were not well placed to gain employment in the colonial administration in Lagos. Thus their motivation to succeed in trade was greater than that of other Nigerians who had more options, especially cash-crop farming. Although circumstances have changed over the years, the Ijebu have remained prominent as a result of cumulative advantages, Akeredolu-Ale's third point.

Cumulative advantages came in two forms. The first, socio-cultural, concerns the socialisation favouring young Ijebus in an environment of the pursuit of business success. This he saw as providing them with motivation:

At least three generations of Ijebu men have hitherto been raised in a social context where clerical employment enjoys little respect, where many people were already deeply involved in commerce.<sup>53</sup>

Consequently, successful businessmen were held in high esteem. The second, operational advantages, were seen as even more important by Akeredolu-Ale:

Over the years, there has developed in the various commercial centres a rich network of business links involving Ijebu businessmen and from which newcomers have benefited.<sup>54</sup>

In addition, the Ijebu were well known for closing ranks in the face of competition and consequently were seen as an interest group by other members of the business community. However, they did compete amongst themselves.

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<sup>52</sup> *Ibid.*, p.359.

<sup>53</sup> *Ibid.*, p.360.

<sup>54</sup> *Ibid.*

Hopkins' observation that dry season activities such as pottery and weaving meant that subsistence farmers provided for much of their own non-agricultural demand is of considerable relevance in explaining the paucity of trading activities amongst certain Ivorian ethnic groups.<sup>55</sup> Moving on to the colonial era, Hopkins advanced the concept of the open economy. He saw it as having five main characteristics: the export of a few primary products in exchange for manufactures, foreign dominance of one or more sectors of the economy, external power control of economic policy, minimal colonial power fiscal input towards a balanced budget and "a monetary system which is an appendage of that of the major power" with the banks principally there for the benefit of foreign companies and settlers.<sup>56</sup>

Bauer's analysis of the competitive advantages and disadvantages of European trading companies and Lebanese and African traders was also important in analysing the performances of these respective groups of traders. In addition, this proves particularly informative when applied to trader performances in the 1970s and 1980s. Bauer's arguments concerning oligopolies and vertical integration in trade<sup>57</sup> are also examined and, further, are related to Hopkins' theory of the open economy in Chapter Two.

Relating both to competitive advantages and to kinship, Kennedy's findings on Ghanaian businessmen may usefully be compared with the evidence about Ivorian traders. He disputed the widely held belief that family and kin were little more than a burden upon entrepreneurial activities. Further, regarding the employment of relatives, he pointed to such advantages as trust in money transactions.<sup>58</sup> Finally, Kennedy showed that substantial starting up capital "had not necessarily been a very important

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<sup>55</sup> A.G.Hopkins, An Economic History of West Africa (Longman, 1973), pp.168-170.

<sup>56</sup>Ibid, pp.168-169.

<sup>57</sup> P.T.Bauer, West African Trade (Routledge and Kegan Paul, 1963), pp.89-191.

<sup>58</sup> P.Kennedy, Ghanaian Businessmen (Weltforum Verlag, Munich, 1980), pp.107-113.

ingredient of business success."<sup>59</sup> These points prove useful when looking at the comparative strengths and weaknesses of WSE and NSE stores and when assessing the effectiveness of government programmes aimed at augmenting the number of Ivorians in trade.

#### 1.2.4 Foreign Taste Acquisition

The final major framework used in the thesis concerns the acquisition of foreign tastes by Ivorian consumers and the economic implications of the changing of consumer tastes towards western-type products and away from indigenous foods. The main argument is that advertising and marketing techniques have encouraged inappropriate consumption patterns which may involve either the introduction of a new product or the substitution of non-local manufactures for cheaper indigenous products. The adverse consequences may relate to health and/or financial cost.<sup>60</sup> The most oft cited examples are those of infant milk formulas, much of the criticism here being aimed at Nestle,<sup>61</sup> and the so-called 'wheat trap' (dependency on bread) in Nigeria.<sup>62</sup> The criticisms have been aimed primarily at multinationals (MNCs) but, as Vernon argued, they are not the only ones who 'distort' consumption patterns.<sup>63</sup> The United Nations Centre on Transnational Corporations (UNCTC) pointed to other factors such as rapid communications, foreign travel, the employment of

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<sup>59</sup> Ibid., p.45.

<sup>60</sup> UNCTC, Transnational Corporations in the World Development, 3rd survey (UN, New York, 1983), pp.227-229; G.André and B.Beckman, The Wheat Trap, (Zed Books, 1985); K.P.Sauvant, 'Multinational Enterprises and the Transmission of Culture: the International Supply of Advertising Services and Business Education', Journal of Peace Research, 13, 1 (1976), pp.49-65; A.Mattelart, Transnationals and the Third World (Bergin and Garvey, South Hadley, Massachusetts, 1983); S.J.Kobrin, 'Multinational Corporations, Sociocultural Dependence and Industrialisation: Needs Satisfaction or Want Creation?'. In P.K.Ghosh (ed.), Multinational Corporations and Third World Development (Greenwood Press, Westport, 1984); A.A.Akinsanya, Multinationals in a Changing Environment (Praeger, New York, 1984), pp.145-154.

<sup>61</sup> See J-C.Buffe, Dossier Nestlé, (Alain Moreau, Paris, 1986).

<sup>62</sup> André and Beckman, Wheat.

<sup>63</sup> As interpreted by T.J.Biesteker, Distortion or Development? (MIT, Cambridge, Massachusetts, 1978), pp.39-41.

expatriates and television programmes. Governments were also criticised by the UNCTC for not taking more action to curb what they saw as damaging consumption developments by raising taxes or restricting import licenses on luxury products. The assertion that

with the growing number of joint ventures and other arrangements between transnational corporations and host countries, developing countries have increasingly become direct parties to the activities which result in the transformation of consumption patterns<sup>64</sup>

may well prove particularly poignant in assessing the role that the Ivorian government has played.

### 1.3 METHODOLOGY AND SOURCES

#### 1.3.1 The National Archives of Ivory Coast and France

Given that the main part of the thesis is devoted to the post-independence era and that archive material in Ivory Coast has only been classified up to 1945 in most cases, the uses of this material were confined almost exclusively to the chapter dealing with the pre-1956 years. The Archives National de Cote d'Ivoire (ANCI) in Abidjan, visited in November and December 1990 were, unfortunately, in decline through lack of funding. The classification of material, however, was adequate and the staff extremely co-operative though some files could not be found. The material obtained covered most of the period 1910-51 though there was very little between 1947 and 1951. Among the documents used were the *Fiches de Renseignements* on trading companies, population data, invoices, telegrams, letters, memoranda, import proformas and legal transcripts. These documents either concerned or mentioned in passing processed foods, rationing, trader debts, consumption habits, Lebanese activities and trading company outlets and their stocks.

The French overseas archives or Archives National de France Section Outre-Mer (ANF SO-M), located in Aix-en-Provence and

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<sup>64</sup> UNCTC, Transnational, p.229.

visited in February 1992, were rather less productive. The classification of much of the material was poor (minute hand written photocopied sheets with files listed in no particular order) whilst some of the descriptions of file contents were inaccurate. It also took up to two hours to obtain some documents (compared to ten or twenty minutes in Ivory Coast). Very little was found here other than customs' tariff books covering the years 1925 to 1950.

### 1.3.2 Official and Government Commissioned Publications

These publications consisted of statistical sources, the five year plans, commissioned reports on six regions and a variety of glossy publications aimed at promoting the image of the country. Import statistics were fairly detailed and, for more recent years, easy to acquire from the customs office in Abidjan or the Chambre de Commerce. These were used extensively to assess the importance of processed foods to consumers and the changes that occurred over time. Population and consumption figures were also useful in this respect though the reliability of the latter may well be suspect. The government also regularly published figures on the number of traders, most of which, with the exception of multiple retail chains, were no more than 'guestimates'.

Government sources not always being the easiest to obtain, extensive use was made of statistics published by the various international organisations. The World Bank was a good source for Gross Domestic Product figures which, in combination with population data, were used to assess purchasing power. Breakdowns of income distribution enabled a more thorough analysis of the likely buyers of different types of processed food as well as helping to explain why some goods failed. In addition, data on the evolution of television and radio set ownership assisted in gauging the extent and effectiveness of media advertising whilst figures on levels of education helped to explain the degree of penetration of products, especially when used in conjunction with the government's consumer survey statistics.



Government commissioned reports from the early to mid 1960s were found at ORSTOM (Petit Bassam) in Abidjan. Most related to regional economic and social surveys. These regional reports were written by Paris-based research institutes for the state and provided a wealth of information which, unfortunately, was often poorly presented. Further, definitions of the types of enterprises enumerated were either poor or non-existent. Consequently, most of the data were used with care. As far as was possible, the data were used to trace the evolution of the numbers of traders in different regions of the country as well as the changing proportion of ethnic ownership, trader margins and regional price variations.

In addition to the regional surveys, a number of five year plan preparatory reports, also at ORSTOM, were commissioned on the functioning of the distribution system in the 1960s and 1970s. These outlined the different types of outlets in Ivory Coast, their methods of operation and their role in the distributive network as a whole. The factual information proved invaluable in assessing changes in the principal characteristics of outlets over the years.

### 1.3.3 Company Archive Material

Obtaining material from company archives proved difficult for a number of reasons. First, many small and medium sized firms had ceased to exist by 1990, generally leaving no trace and no indication as to who to contact to gain access to archives. Second, a handful either refused any access to archives (Nestlé, SODIREP) or would only extract specified material upon request (CODIS, Scoa-Paris) for reasons of confidentiality. Many surviving companies had cut down on staff levels and had neither the time nor desire to help a researcher; recent cases of heavy fines by the state for irregularities meant none were prepared to allow unsupervised access. The information obtained from some of these archives was nonetheless useful. CODIS archives provided records of dairy products sold, price structures and their distribution methods. Scoa-Paris archives made available company reports from the mid 1970s to 1991. Third, some companies had destroyed, or claimed to have destroyed, their records (Scoa-Ivory Coast, CDCI, CICA).

These claims could only be partially true as the law requires that some records be kept for a certain period. For example, invoices to customers must be available for inspection for at least five years. Finally, the vast majority of African and Lebanese traders kept no written records.

In this somewhat unfavourable climate, a heavy reliance was placed on the archives of two companies, both subsidiaries of the Jersey based West Africa Holdings company. Access was due to the fact that the researcher used to work for one of the subsidiaries, the Danish Africa Company (DANAFCO), an import-export firm. The other was the Société Africain de Fabrication Alimentaire (SAFA), a manufacturer of stock cubes. Whilst these archives were poorly organised and had been partially destroyed, a large amount of information was obtained. Especially valuable were market surveys and reports for cubes and Quaker oats, the sales and stock ledgers, reports and memoranda on the activities of other import-export companies (including items written by other companies), store surveys and credit client records.

#### 1.3.4 Interviews

Interviews were the main source of information on the activities of importing companies and their attitudes to other firms and to the state. Useful information was also obtained from some NSE sector traders on their operating methods and the problems they faced, from trade organisation employees on retail chains and buying houses, and from company salesmen, some of whom had been travelling the country for ten or more years. Some interviews were taped but it was felt that in some cases taping would have resulted in the interviewee being much less forthcoming. Some individuals specifically requested that the tape be removed from the recorder.

Most interviews were conducted in French, a few in English. As far as was possible, the reliability of interviewees was tested by 'planting' a number of factual questions which could be verified through alternative sources. This, it is hoped, enabled a better

judgement of which interviewees possessed the greatest capacity for accurately recalling information and with the least bias. Also helpful was the fact that many of the subjects were well known to the author. One interview was done by an assistant under special circumstances but was not used except when confirmed by another source.<sup>65</sup>

#### **1.3.5 Fieldwork Questionnaires, Store Surveys, Discussions and Observation**

Two hundred and eighty questionnaires were used to obtain mostly factual answers from mostly NSE traders. The sample took in equal numbers of four categories of traders (Lebanese, Mauritians, Ivorians and Non-Ivorian Black Africans) to enable comparisons between the groups. Three assistants were trained over a three week period and four pilot surveys were conducted but a number of problems could not be overcome. Chief amongst these was language for many traders had a poor grasp of French which sometimes meant that questions and answers had to be translated. As any survey methodologist knows, this leads to serious problems about reliability, especially in relation to opinion questions. In addition, whilst no attempt was made at achieving a sample with proportionate numbers of the different ethnic categories of traders (which would have required over a thousand questionnaires in total to achieve an adequate number of Lebanese), other aspects of the sample were unsatisfactory. Given the available resources and the lack of a reliable data base, it was impossible to guarantee an accurate balance between wholesalers and retailers or between different regions of the country.

Given the above problems, the opinion question results were largely ignored in the thesis except where they were confirmed by other sources. The factual questions were also generally only used under the same conditions but should not have been greatly affected by the language problem. This left the possibility of

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<sup>65</sup> Most interviews were conducted and most archives consulted during the fieldwork period in Ivory Coast in 1990 but, for ease of reference, are footnoted separately from the fieldwork described in the following section.

respondents lying out of fear (e.g. of deportation, as was believed to be the case on at least two occasions concerning the nationality question) or a desire to appear generous (e.g. as sometimes may have been the case concerning remittances sent to the family) or for other unknown reasons. This is always a problem for a researcher and if a respondent is determined to lie and is good at it, there is little to be done. However, analysis of the results of the questions in the light of other sources seemed to indicate that the reliability of the survey was better than might have been expected. But the data nonetheless were treated with caution throughout.

Far less problematic were the three store surveys. The first of these, the brand range survey, assessed the number of product items available for selected categories of products (e.g. hot chocolate drinks, breakfast cereals) in different classes of outlets. This assisted in the differentiation between outlets and gave a better idea of the type of consumer the store attracted. The survey was conducted simply by walking into shops and counting the number of different items on the shelves. The second, the product range survey, involved listing all the processed foods found in a store to determine how many items were stocked altogether in different types of outlets in different regions. These data were compared to earlier sources on product range.

The third survey, the regional distribution survey, involved visiting every processed food store in seven interior towns and three districts of Abidjan and ticking off the availability of selected products as well as noting the store type, the proprietor's nationality and ethnic group, and how long he had traded from the establishment. Two assistants were trained for this mostly mundane work. The products surveyed included most of the big selling items plus a selection of less widely distributed items. The data were compared with the outlet surveys found in the DANAFCO archives to assess changes during the 1980s and also served as the basis for regional comparisons.

During the conduct of the questionnaires and surveys, numerous opportunities arose for observation and brief discussions with traders. Observation involved visual impressions of such things as store size (some outlets were also measured), where cash was kept, shelving facilities, location of the store and anything else that drew the attention. Conversations naturally arose during the fieldwork and were useful for asking questions about the busiest hours of business, types of consumers, opening hours, attitudes towards other traders, employment of family and friends, frequency of promotion or sales van visits, methods of payment for goods and so on. Much unsolicited information was also obtained, especially relating to attitudes towards traders of different ethnic groups and the general economic climate. For the most part, specific information obtained this way was not used in the thesis unless backed up by other sources. But these conversations provided general impressions of trader attitudes which were invaluable in that they often encouraged a more questioning approach to the theories and assumptions about African environments found in western academic literature.

#### **1.3.6 Personal Experience 1983-1986**

One of the most important sources for the thesis was personal experience. From January 1983 to November 1985 and from June to September 1986 the author worked for DANAFCO in various capacities, starting as a Salesman and odd job man, moving on to Sales Manager in late 1984, Marketing Manager and Credit Controller in mid 1985, and Product Manager in 1986. This experience provided many invaluable insights as well as being the inspiration for the thesis. Observation and hundreds of hours of often idle conversations with traders of all descriptions as well as salesmen and other personnel from many different distribution companies provided a pool of ideas and information without which the thesis would have been much the poorer.

There was, of course, a problem concerning the footnoting for the author could not interview himself and prove that the information had not been invented. Consequently, personal experience is generally used in conjunction with other sources, to either confirm

or elaborate slightly on them. On occasion, personal experience is given as the only source but generally the information can be verified by someone visiting the country. On the rare occasion where verification is all but impossible, a degree of trust on the part of the reader is requested but not essential as there are no instances where the elimination of this source would fatally undermine any argument. As far as was possible, details on where and when the information came from were given in the footnotes. A list of the principal sources is provided in the bibliography and most can be contacted for verification.

### 1.3.7 Books, Journals and Periodicals

There being very few publications directly relating to Ivory Coast internal trade, most of these sources were used for ideas and theories covered in the frameworks section. Among the handful of books which were about Ivory Coast is D.Bollinger's Le marketing en Afrique, tome 1: La Cote d'Ivoire. This text is a mine of information from the time of the Atlantic slave trade to 1977 though it does not cover the earlier years in any detail. There are useful sections on the retail multiples, consumers and advertising but little is said about small or medium sized importers, wholesale chains, the Lebanese or other NSE traders. What analysis there is superficial at best and the book is mainly useful as a source for facts. D.Bigo's 'The Lebanese Community in Ivory Coast' and C.Boone's 'Commerce in Cote d'Ivoire' also proved useful in many of the chapters.

The chapter on the pre-1950 years would have been much the poorer without P.Kipre's Villes de Cote d'Ivoire (two volumes). Kipre consulted the ANCI at a time when they were obviously better organised than in 1990 and his detailing of the numbers and locations of trading establishments proved very useful, as did much of the material on the origins and growth of Ivorian towns. One text referred to throughout the thesis is R.Mundt's Historical Dictionary of the Ivory Coast which, quite apart from providing all those simple facts of which one can never remember the original source, has an extensive bibliography.

The Ivory Coast state owned Fraternité Matin also proved useful with features on the local milk industry, the Lebanese and alleged price fraud amongst traders. That much of what appears in this daily publication ('newspaper' would be stretching the definition a little) makes the London tabloid The Sun seem informed and balanced is in itself a useful indicator of government attitudes towards the commercial sector. Finally, the Economist Intelligence Unit's Cote d'Ivoire Country Report, published quarterly, proved useful for the most recent statistics, various incidents concerning the Lebanese community and political events affecting the commercial sector.

#### 1.4 ORGANISATION OF THE THESIS

The remainder of the thesis is divided into seven chapters, some presenting general perspectives and others focusing on key areas. The next chapter deals with internal trade to circa 1956. This provides background essential to understanding developments in later years. A number of themes are explored as partial explanations for the dominance of foreigners in trade and the origins of western style trading practices in Ivory Coast.

This is followed by two chapters on stores since 1956, one on NSE outlets, the other on WSE outlets. Both examine developments in the two sectors, explore their differences and establish the reasons for the failure of WSE stores. Among the relevant factors discussed are commercial overheads and operating costs, culture, trading practices, store location, consumer outreach (the distance from which stores can attract customers), regional variations and products stocked. Chapter Five looks at suppliers and products, the relationship between importers, manufacturers and stores and the factors behind the success of some products and the demise of others.

Chapter Six examines consumers. Import data, population, income per capita and consumer surveys are used to establish the size of

the market. Income distribution, education levels, media access and advertising are used to explain consumer preferences. The controversial topic of foreign taste acquisition is pursued further in Chapter Seven which consists of cases studies on the markets for milk and stock cubes. Here, also, a more comprehensive insight into the operating methods of traders is gained. Marketing techniques used by importers and manufacturers are compared and contrasted and the role of WSE outlets is shown to be peripheral in the case of the most widely distributed product in Ivory Coast, the stock cube. Finally, Chapter Eight, the conclusion, summarises the main points of the thesis and relates them to wider issues in development.



## **CHAPTER 2**

### **TRADERS, PRODUCTS AND CONSUMERS BEFORE 1956**

The chapter aims to explain how trading patterns during the period with which this thesis is primarily concerned (1956-90) were heavily influenced by preceding events from the late sixteenth century up to 1956. The chapter is divided into nine sections. The first outlines the chronology of the period under discussion, identifying key continuities and changes. The following four sections examine the evolution of African commercial interests to the early colonial period. In particular, these sections analyse the determinants of the types, functions and location of stores; and why Ivoirians were relatively marginal in the running of these outlets. Whilst many authors have made valuable contributions towards an understanding of precolonial trade in the territory, there does not appear to have been an attempt to bring these different strands of thought and research together. Therefore these sections seek to provide a synthesis as a first step towards encouraging other researchers to seek a more comprehensive and penetrating analysis of Ivoirians in precolonial and early colonial trade. Sections six to eight discuss the evolution of European and Lebanese commercial interests within Ivory Coast during the colonial period, and their impact on African traders. It will be argued that the location of European and, to a lesser extent, Lebanese and African commercial activity was determined by three main factors: security, access to sources of supply of local produce and transport availability.

#### **2.1 OUTLINE**

Periodisations are usually arbitrary and this is so for Ivory Coast before 1956. However, the economic and political trends are so complex as to make the task a necessity rather than an option. The starting point is the latter part of the sixteenth century for it sees the beginning of a period of shifting populations and, later, temporary European settlements and large scale exporting of

slaves. Pinning exact dates on migratory populations is futile. The settlement of Mande speaking Islamic traders, the Dioula, in Ivory Coast began around the end of the sixteenth century and the migrations continue to this day.<sup>1</sup> The timing of Baoule migrations into Ivory Coast is disputed, but it was probably also a gradual process during the eighteenth century. Both this migration and that of the Abron to the Bondoukou region around the same time were a consequence of the expanding Asante empire.<sup>2</sup> The locations of the five main ethnic groups have remained largely unaltered since the late eighteenth century (see Map 4), the main change being the heavy migration into some, mostly southern, areas, effectively making them mixed communities.<sup>3</sup>

The next date is more specific though again not altogether satisfactory. 1807 was the year Britain made it illegal for her subjects to participate in slave trading, an event which hastened the decline, though did not immediately end, the 'Atlantic slave trade' and heralded the beginning of 'legitimate' commerce i.e. non-slave trade with the west. These terms are somewhat unsatisfactory though for the trading of slaves by Africans within Africa continued whilst the use of 'legitimate' commerce ignores the internal trade between Africans. It has been argued that this was far larger scale than that involving Europeans and it included slaves.<sup>4</sup> Further, trading in human 'merchandise' was not the only

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<sup>1</sup> B.Lewis, 'The Dioula in the Ivory Coast', pp.273-289, and R.R.Griffeth, 'The Dyula Impact on the Peoples of the West Volta Region', pp.167-181. Both papers are in C.T.Hodge (ed.), Papers on the Manding, (Indiana University, Bloomington, 1971); RCI, Population de la Cote d'Ivoire, (Ministère de l'Economie, Abidjan, 1984).

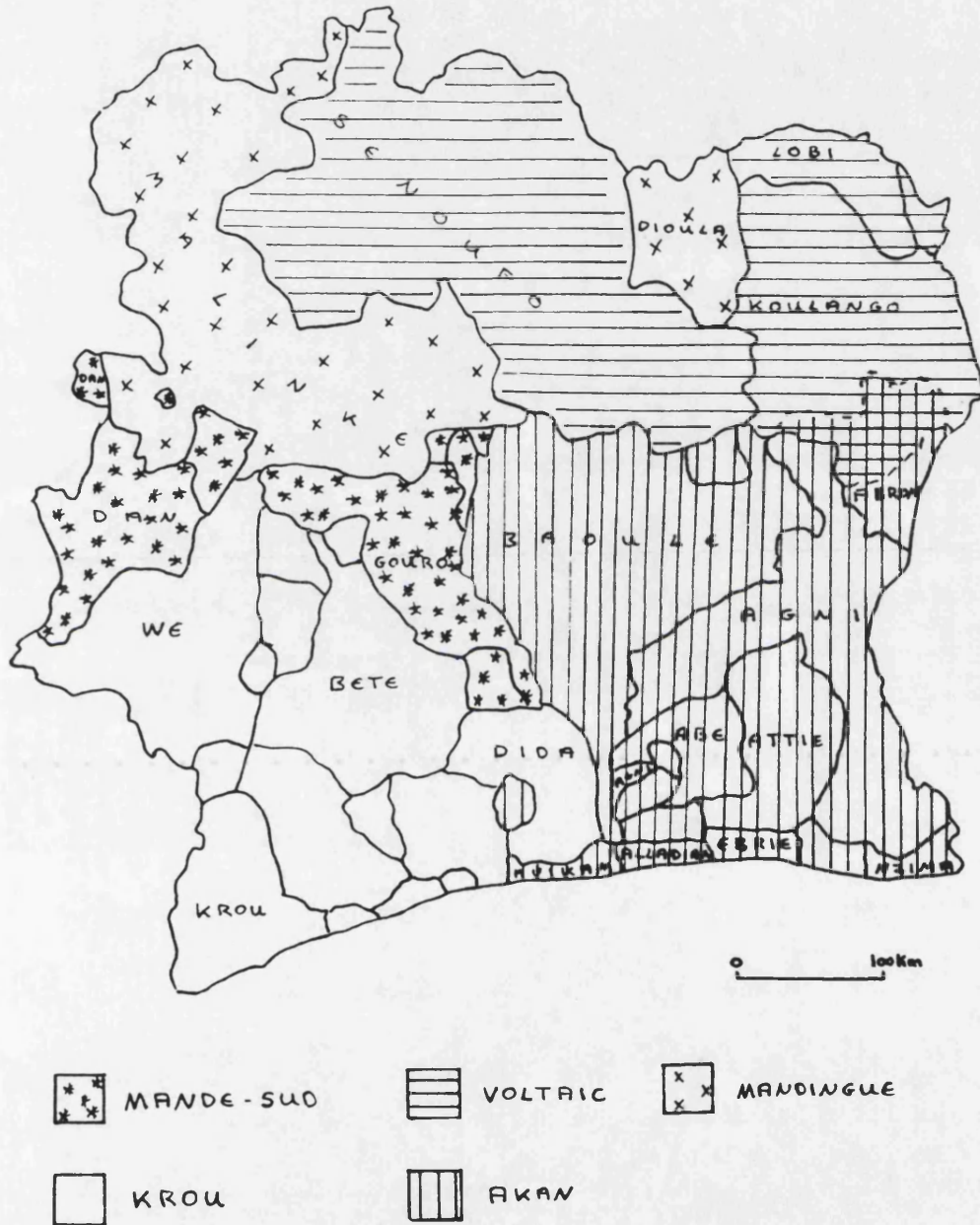
<sup>2</sup> T.C.Weiskel, French Colonial Rule and the Baule Peoples, (OUP, Oxford, 1980), pp.5-9; R.Handloff, 'Trade and Politics on the Asante Periphery: Gyaman, 1818-1900.' In E.Schildkraut (ed.), The Golden Stool: Studies of the Asante Center and Periphery, Anthropological Papers of the American Museum of Natural History, vol. 65 part 1 (New York, 1987), pp.252-259.

<sup>3</sup> RCI, Population; J-P.Duchemin and J-P.Trouchaud, 'Données démographiques sur la croissance des villes en Cote d'Ivoire', ORSTOM ser.Sci.hum, 6, 1 (1969) pp.71-82.

<sup>4</sup> A.G.Hopkins, An Economic History of West Africa, (Longman, 1973), pp.112-113, 124; D.Eltis and L.C.Jennings, 'Trade Between Western Africa and the Atlantic World in the Precolonial Era', American Historical Review, 93, 4 (1988), pp.936-959.

European activity during the 'Atlantic slave trade' era: gold and ivory were also traded in this period.<sup>5</sup>

MAP 4: PRINCIPAL ETHNIC GROUPS AND SUB-GROUPS, IVORY COAST



Source: RCI. *Population de la Cote d'Ivoire* (Ministère de l'Economie, Abidjan, 1984).

<sup>5</sup> M.Johnson, 'Ivory and the Nineteenth Century Transformation in Africa'. In G.Liesegang, H.Pasch and A.Jones (eds.), *Figuring African Trade*, (Dietrich Reimer Verlag, Berlin, 1986), pp.97-99; Weiskel, *Peoples*, pp.9-15; Eltis and Jennings, 'Atlantic', pp.936-959; S.T.Achen, S.C.Bech and M.Rud (eds.), *Danmarkshistoriens: Hvornår Skete Det* (Politikens Forlag, København, 1972), p.183.

The next watershed was 1893, when France formally declared Ivory Coast its colony though the borders of the territory were not finalised until 1914.<sup>6</sup> It took the French until 1918 to finish 'pacifying' the indigenous peoples, unashamedly employing brutal and barbarous methods in their so called *mission civilatrice*.<sup>7</sup> For Ivorians, these years were ones of repression, taxation and forced labour to which was added forced recruitment during the First World War.

From 1918 until 1940 Ivory Coast experienced what Crowder termed "colonial rule proper".<sup>8</sup> Commercial activities, particularly those of the main European trading companies (henceforth ETCs) after 1930, expanded rapidly. France made only limited efforts to develop the infrastructure of the colony. The inter-war years also saw the development of a French settler community, the emergence of Lebanese traders as serious competitors in internal trade to Europeans, and the hindrance of African enterprises.

The years 1940 to 1946, covering the Second World War and its immediate aftermath, saw Africans once again the hardest hit due to war requisitions, a trade embargo during the Vichy period from July 1940 to November 1942, rationing and the continuing practice of forced labour. European concerns, whilst also affected by war conditions, found their relative position strengthened, partly due to favouritism from the colonial administration.

The final period, 1946 to 1956, saw profound change. The abolition of forced labour in 1946 greatly improved the lot of African planters and plantation labourers alike. This was a large

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<sup>6</sup> R.J.Mundt, Historical Dictionary of the Ivory Coast, (Scarecrow Press, Metuchen, 1987), p.7.

<sup>7</sup> Ibid, pp.23-24, 128; Y.Person, Samori: la renaissance de l'empire Mandingue, (NEA, Abidjan, 1983), pp.20-21; Weiskel, Peoples, pp.33-210; J.D.Hargreaves, West Africa Partitioned, vol.2 (Macmillan, Basingstoke, 1985), p.53; P.Manning, Francophone Sub-Saharan Africa 1880-1985 (CUP, Cambridge, 1988), pp.64-65; G.Cangah and S-P.Ekanza, La Cote d'Ivoire par les textes (NEA, Abidjan, 1978), pp.105-108; ANCI, 1QQ8/V-11-275, Chambre de Commerce, procès-verbal de la séance du 13 fevrier 1911.

<sup>8</sup> M.Crowder, West Africa under Colonial Rule, (Hutchinson, 1968), p.19.

step in the fortunes of the future President Houphouet-Boigny, a planter himself and the force behind the abolition movement. The post-war resurgence led to record profits for the big European commercial interests in the early 1950s, spurred by the Korean war boom, investments to develop the economy, and the abolition of rationing after ten years in 1950. Lebanese and African interests also benefited from these developments. But for the ETCs a variety of factors meant the good times were short lived. By 1956 the end of the two-way trade (exports of local merchandise, imports of manufactured goods) was clearly in sight and most ETCs began implementing a phased withdrawal of trading posts, a process not completed until the early 1960s. With this withdrawal came a diversification of activities into industry, specialised trade and, most importantly for this thesis, supermarkets and retail and wholesale multiple chains.

## 2.2 RESOURCES AND THE MARKET: THE SIXTEENTH TO THE NINETEENTH CENTURY

This section argues that sparse population, communication and transport problems, and the self-sufficiency of rural communities hindered the spread of commercial activity, particularly long-distance trade, in many areas. Low population density often means low market demand for goods unless there is considerable purchasing power. It also implies that, assuming a reasonably fertile terrain, there was adequate land for subsistence farming which in turn implies a degree of self-sufficiency, and less need to trade both for agricultural produce and to supplement income. There was also the dry season during which agriculturalists often had time to spare. As Hopkins noted, this meant people had time for crafts such as weaving and pottery, thereby supplying their own demand for such items and lessening the need for manufacturing centres.<sup>9</sup> Finally, poor transport and communication meant a lack of knowledge of market conditions and would have greatly increased the price of goods in areas with

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<sup>9</sup> Hopkins, Economic History, pp.28, 48-51.

no concentrations of population as is still sometimes the case even today.<sup>10</sup>

Boutillier has categorised towns involved in long distance trade into three zones according to latitude, role and environment. The first category concerns the great centres to the north of Ivorian territory from which trans-Saharan trade caravans departed northwards, the second comprises those between the forest and the Sahel (termed 'transitional' by Arhin)<sup>11</sup> and the third the coastal centres.<sup>12</sup> However, unlike Gold Coast,<sup>13</sup> towns did not exist in the coastal zone of Ivory Coast.

In the sixteenth century the territory comprised two very different regions, the northern savannah and the southern forest. In both, the household<sup>14</sup> was the principal unit of production and trade as well as of the transmission of accumulated wealth.<sup>15</sup> On the eve of colonisation, the forest zone had few important concentrations of population and certainly no great towns. The largest, according to Verdier's agent Pierre Grisard, was Tiassale which he estimated at five thousand inhabitants in 1891<sup>16</sup> but the forest zone peoples mainly lived in small villages. Whilst this was also true of the north, there existed several large towns such as Kong (fifteen thousand inhabitants in 1888) and Bouna (ten thousand around 1890).<sup>17</sup> There was nothing comparable to these great *cités marchands* in the south.

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<sup>10</sup> See, for example, IDET-CEGOS, 'Région Odienné-Seguela' (Ministère du Plan, Puteaux, 1968).

<sup>11</sup> See K.Arhin, West African Traders in Ghana in the Nineteenth and Twentieth Centuries (Longman, 1979), p.2.

<sup>12</sup> J-L.Boutillier, 'La cité marchand de Bouna dans l'ensemble économique Ouest - Africaine pré-colonial'. In C.Meillassoux (ed.), The Development of Indigenous Trade and Markets in West Africa (OUP, 1971), p.241.

<sup>13</sup> See Arhin, Ghana, pp.1-20.

<sup>14</sup> For a discussion on the various meanings of 'household', see S.Marks and R.Rathbone, 'The History of the Family in Africa: Introduction', IAH, 24, 2 (1983), pp.149-150.

<sup>15</sup> D.Bollinger, Le marketing en Afrique, tome 1: La Cote d'Ivoire (CEDA, Abidjan, 1977), pp.13-19; Hopkins, Economic History, pp.21-22; P.Kipre, Villes de Cote d'Ivoire, tome 1 (NEA, Abidjan, 1985) pp.47-82.

<sup>16</sup> Kipre, Villes, tome 1, p.69.

<sup>17</sup> Ibid, p.61.

Compared to rural areas, traders would have found it more profitable in towns where there were many potential consumers within a small radius, rather than travelling greater distances through often hostile territory in order to bring goods to scattered potential consumers. For the rural consumer, travelling maybe hundreds of miles to acquire goods was rather a different proposition to the situation of the urban consumer who could find a trader no more than a few hundred yards away from his home.

In the south, the plentiful supply of land meant that most basic necessities were amply provided for and other requirements were generally satisfied by inter-village exchange or Dioula traders<sup>18</sup> and, to a more limited but gradually increasing extent, by Europeans via coastal traders. To the north there were not only great commercial centres but also markets in small towns and large villages like Korhogo, Seguela, Odiene and Madinani.<sup>19</sup> Trade was an important activity for many people and the region possessed extensive and well worn trade routes which the south largely lacked. Many northerners made substantial fortunes trading in a vast and expanding area which stretched from the fringes of the forest zone in the south to the great commercial centres like Timbuktu and Djenne in the steppe and dry savannah in the north.<sup>20</sup>

The most sparsely populated region was the south western corner, inhabited by the Krou<sup>21</sup> people who also stretch into Liberia. There was little purely inland trade in this region beyond the local level in the eighteenth and nineteenth centuries. From the sixteenth century, the Krou supplied slaves to the Portuguese and later to British, Dutch and French traders.<sup>22</sup> Statistics compiled by

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<sup>18</sup> C.Meillassoux 'Social and Economic Factors Affecting Markets in Guro Land'. In P.Bohannon and G.Dalton (eds.), Markets in Africa (Northwestern University Press, Evanston, 1962), pp.279-297.

<sup>19</sup> Ibid., p.286; Kipre, Villes, tome 1, pp.50-65.

<sup>20</sup> Hopkins, Economic History, pp.58-65.

<sup>21</sup> Krou here refers to the *sub-group*. The Krou *group* embraces the Krou, Bete and other sub-groups.

<sup>22</sup> G.Courreges 'Sassandra'. In G.Courreges, Grand Bassam et les comptoirs de la cote (L'Instant Durable, Clermond-Fr, 1987).

Curtin<sup>23</sup> indicate that 11.6% of slaves exported by the English slave trade from 1690 to 1807 came from the Windward coast (Liberia and Ivory Coast). He stated that "the pattern of trade there, however, suggests that the supply of slaves was not drawn from the distant hinterland, but from sources close to the coast".<sup>24</sup> This may be one reason why this region is underpopulated.

Jones and Johnson claimed the volume of slaves taken from the Windward Coast has been overestimated and argued that this area was already sparsely populated at the time.<sup>25</sup> An additional reason could be war in the region caused at least in part by Krou slave gathering. Inikori stated that "slaves were the commodity for which by far the largest number of firearms were exchanged",<sup>26</sup> and that "firearms . . . were used mainly for slave gathering and the wars largely stimulated by the latter".<sup>27</sup> The resulting instability could thus have led to migrations to other regions, as happened with French recruitment drives in the Guiglo region during World War One.<sup>28</sup> To summarise, commercial activity in Ivory Coast, the north excepted, was largely limited to local exchange. The following sections will add to some of the issues raised here, most especially the roles played by Dioula traders and French rule in stifling the growth of an indigenous commercial class in southern Ivory Coast.

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<sup>23</sup> P.D.Curtin, The Atlantic Slave Trade (University of Wisconsin Press, Madison, 1969), p.150.

<sup>24</sup> Ibid., p.226.

<sup>25</sup> A.Jones and M.Johnson, 'Slaves from the Windward Coast', IAH, 21, 1 (1980), pp.17-34.

<sup>26</sup> J.E.Inikori, 'The Import of Firearms into West Africa, 1750 to 1807: a Quantitative Analysis'. In J.E.Inikori (ed.), Forced Migration (Hutchinson, 1982), p.137.

<sup>27</sup> Ibid., p.146.

<sup>28</sup> J.J.Lauer, 'Economic Innovations among the Doo of Western Ivory Coast, 1900-1960' (University of Wisconsin Ph.D., Madison, 1973), pp.92-95.



### 2.3 DIOULA TRADERS AND INDIGENOUS IVORIANS BEFORE SAMORI

The single most important group of traders before colonisation were the Dioula. This section describes their activities and seeks to explain why this minority group enjoyed a dominant position for so long and how this affected the peoples amongst whom they settled. 'Dioula' is a Mande word which may be taken to describe those Mande speaking peoples who, on the decline of the Mali empire, gradually dispersed and migrated from the end of the sixteenth century and whose primary activity was trade.<sup>29</sup> Their penetration into other areas did not occur in one mass movement but over several centuries and initially most of their activity in Ivory Coast was confined to northern towns like Odienne and Bouna. Despite preserving their cultural, linguistic and religious characteristics, the Dioula were not generally treated with hostility by the people among whom they settled as the commercial benefits of their activities were recognised.<sup>30</sup>

The Dioula spread gradually into towns where they lived in small communities, maintaining contact with the communities they had just left. The maintenance and development of their links was aided by kinship ties and shared religion. The result was the creation of a cross-regional trading network and a degree of commercial organisation which was central to their success as traders.<sup>31</sup> Cohen's observation that the domination of particular trading groups in certain areas has long been a common phenomenon<sup>32</sup> relates well to the Dioula. Overcoming the three technical problems in trade - information, speed and trust - was facilitated by traders of the same ethnic and religious background controlling most of the stages of trade in certain commodities.<sup>33</sup>

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<sup>29</sup> There are many definitions of 'Dioula'. Southern Ivorians regard all northern Muslims as Dioula, be they Malinke, Hausa or Senoufo. Here the term is restricted to Malinke, Maraka and Bambara Islamic traders as they, unlike the Hausa, Senoufo and others, were part of the dispersion on the decline of the Mali empire.

<sup>30</sup> B.Lewis, 'Dioula', pp.273-289; R.R.Griffeth, 'Dyula', pp.167-181.

<sup>31</sup> R.Launay, Traders without Trade (CUP, Cambridge, 1982), p.23; Boutillier, 'Cité', pp.243-244. See also Arhin, Ghana, pp.3-4.

<sup>32</sup> A.Cohen, Custom and Politics in Urban Africa (Routledge and Kegan Paul, 1969), p.191.

<sup>33</sup> Ibid., pp.7-20.

From the north the Dioula brought salt, iron goods, cattle and slaves which were traded primarily for kola nuts from the south. Collection points for goods from forest zone people like the Gouro and, later, the Baoule were located along the edges of the forest zone and, as the goods moved further north along a chain of towns like Touba, Mankono, Seguela and Odiene the quantities would gradually become larger, requiring caravans of up to 2,000 men to carry and guard the merchandise to the middle Niger. Maraka caravans tended to be smaller (thirty or forty traders) but better armed than Malinke ones and made fewer stops between the points of departure and arrival.<sup>34</sup>

Boutillier characterised this as network trade, that is that the goods were controlled by a single trader from the time of purchase to their eventual destination.<sup>35</sup> In the course of this journey, the trader and his goods would pass through the two zones where "the openness of the vegetation facilitated the passage of the beasts of burden of the northern caravans . . . and permitted easy diversion of direction in districts hostile to travellers."<sup>36</sup> The forest zone, however, was unsuited to caravans. The trader may have controlled this directly or through one or more representatives. These representatives were often involved on their own account in relay trade, the second of Boutillier's categories, this being typical of the forest zone. This involved goods changing hands several times or else a trader would exchange merchandise as he progressed along the route.<sup>37</sup>

Whilst the Dioula were in no position to prevent their host communities from becoming involved in trade, their position was such that their hosts could not compete with their experience and contacts and were consequently happy to remain as political

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<sup>34</sup> Lewis, 'Dioula', pp.273-289; Griffeth, 'Dyula', pp.167-181; Launay, Traders, pp.39-47; R.Roberts, Warriors, Merchants, and Slaves (Stanford University Press, Stanford, 1987), pp.58-68.

<sup>35</sup> Boutillier, 'Cit ', p.241.

<sup>36</sup> Arhin, Ghana, p.2.

<sup>37</sup> Boutillier, 'Cit ', p.241.

overlords primarily engaged in agricultural activities<sup>38</sup> (a partial exception to this was the Gyaman kingdom which is dealt with latter). The Gouro and Dan peoples from whom the Dioula collected kola in the northern forest zone had not the means to compete with Dioula traders and were primarily engaged in production. Thus, when it came to trading with the European commercial houses during the colonial era and, later still, setting up shops, the Dan and Gouro lacked both trading experience and contacts. Lauer argued that the Doo in the west were disadvantaged because they had "no professional trading class, and this might explain their failure in later competition with outsiders".<sup>39</sup> The Baoule, as will be shown later, were in a better position because of their comparatively extensive trading activities to the east and south<sup>40</sup> but the Dioula nonetheless performed many trading functions which might otherwise have been in Baoule hands.

#### 2.4 THE EFFECTS OF THE COAST AND COASTAL SOCIETIES ON TRADE

The theme of this section is that there was a relatively small indigenous involvement in maritime trade. During the initial contact with Europeans in the seventeenth and eighteenth centuries, Europeans rarely went ashore because of the treacherous currents and complex system of lagoons.<sup>41</sup> Instead, local traders, principally the Alladian, would row out in their canoes and trade on board the (mostly English) ships. Consequently, this section of the coast is referred to as a 'ship coast' as opposed to a 'fort coast', like Gold Coast, where there were permanent European settlements.<sup>42</sup>

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<sup>38</sup> Launay, Traders, pp.14-24; Kipre, Villes, tome 1, pp.70-71.

<sup>39</sup> Lauer, 'Doo', p.67.

<sup>40</sup> Weiskel, Peoples, pp.5-32.

<sup>41</sup> J.K.Fynn, Asante and its Neighbours 1700-1807 (Longman, 1971), p.10; Weiskel, Peoples, p.5.

<sup>42</sup> Kipre, Villes, tome 1, p.85; Weiskel, Peoples, p.35; M.Auge, 'L'organisation du commerce pré-colonial en Basse Cote d'Ivoire et ses effets sur l'organisation sociale des populations cotières'. In Meillasox (ed.), Indigenous, pp.153-156; J.Hargreaves, France and West Africa (Macmillan, 1969), pp.60-61.

The Quaqua coast was not totally devoid of trading forts during the legitimate commerce era but their presence was not permanent. The French merchant house Victor Regis had posts at Assinie, Grand Bassam (est.1843) and Dabou (est.1854) but these were all withdrawn in 1857.<sup>43</sup> Others were more permanent, such as Verdier and Swanzy who each had around ten trading posts or 'factories' in 1871 in places like Toupah, Alepe and Tiagba but these were mostly run by Fanti, Sierra Leoneans and Liberians as Swanzy had long used these peoples elsewhere, meaning they already had experience of European commercial operations.<sup>44</sup> Thus local groups, with the exception of the eastern Nzima, were deprived of the commercial experience of running stores. This might not have happened had the coast been more hospitable to navigate, enabling European traders to settle much earlier and before they had alternative non-local experienced agents.

Marriage alliances by the Baoule were important in explaining the west-east extension of trading routes as opposed to north-south routes to and from the coast. According to research done by Meillassoux,<sup>45</sup> trade with the neighbouring Gouro was via an "intermediary area between the Baule and the Guro . . . populated by several groups of Baule origin, but assimilated to Guro culture". Here, trade was affected by social considerations whereby matrimonial compensation and prestige were important, but the issue of whether trade was for profit or not will be returned to later. Weiskel argued that Baoule marriage alliances with "local populations in the context of asymmetrical power relations of the slave trade probably did as much to consolidate Akan hegemony in this region [west of the Comoe] as any act of forceful conquest".<sup>46</sup>

The expansion of Akan influence and the difficulties of trading along the Quaqua coast meant that trade networks running in an

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<sup>43</sup> Kipre, *Villes*, tome 1, pp.84-85.

<sup>44</sup> *Ibid*; G.Niangoran-Bouah, 'Historique du nom de Grand Bassam'. In Courreges, *Comptoirs*.

<sup>45</sup> Meillassoux, 'Social', pp.289.

<sup>46</sup> T.C.Weiskel, 'Asante and the Akan Periphery: the Baule on the Western Akan Frontier'. In Schildkraut (ed.), *Golden*, p.265.

east-west direction were more important than north-south ones, especially after the abolition of the (external) slave trade. This argument was reaffirmed by Person who contended that the Baoule expansion in the interior from east to west in the mid eighteenth century may have all but ended north-south routes which had existed until then.<sup>47</sup> As can be seen from the map, European goods moved up from Cape Coast to Kumasi before either passing west via Agni territory or north-west via Bondoukou or Bouna. Thus, a combination of political and geographical factors meant that southern Ivory Coast was circumvented by the major trade routes for much of the eighteenth and nineteenth centuries.

From the 1830s, with new sources of trade being sought for 'legitimate' commerce, the previously ignored Ivorian coast between Fresco in the west and Assinie in the east began to develop its own economic activities. This was based on palm oil production by local chieftains, traded offshore with mainly British ships. This opened up opportunities for local traders, especially among the eastern Nzima (who had already come into extensive contact with the British along the Gold Coast) and the Alladian (who dominated production). Thus palm oil was exchanged for European goods which were then exchanged for slaves from the Baoule on the southern fringes of Baoule territory at places like Tiassale.<sup>48</sup>

Even then, the coastal societies did not develop into major commercial peoples like the Dioula. This is explained by the lack of a common culture, and religion like Islam, which decreased the chances of them coming together into trading communities. Given time, this may have happened - after all, the Dioula network evolved over a considerable period of time - but the establishment of French customs posts and other restrictions (detailed later) towards the end of the century did not give them that time.

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<sup>47</sup> Weiskel, *Peoples*, pp.6-8.

<sup>48</sup> *Ibid.*, pp.30, 82-83; Auge, 'Organisation', pp.153-156.

To summarise, a variety of factors, although individually perhaps not very important, collectively provide considerable evidence that the nature of the coast and coastal societies significantly delayed, diluted and diverted the penetration of commercial influences. The physically hostile nature of the coast meant there was little trade until the mid nineteenth century and the short period between then and French colonisation towards the end of the century was not time enough for a group of indigenous traders to establish themselves, with the exception of the Nzima whom, as detailed later, were suppressed by the French. At the same time, Baoule contacts with the Asante made trade in an east-west direction more likely anyway.

## 2.5 THE ASANTE AND SAMORI EMPIRES AS AN INFLUENCE ON TRADE

The empire of the Asante to the east and later that of Samori Toure to the north had mostly negative effects on Ivorian trade but were at the same time ultimately responsible for the eastern and northern areas of Ivory Coast being more exposed to commercial influences than western and south western areas. Kense has asserted that "the impact of the Asante on the peoples of the Black and White Volta river region was minimal".<sup>49</sup> This conclusion seems unsustainable considering the evidence from the Kingdom of Gyaman, founded at the end of the seventeenth century by the Abron, an Akan group fleeing from Asante domination. Around 1740 the Asante absorbed Gyaman and, despite several Abron uprisings, maintained their control until the British intervention at Kumasi in 1874. Whilst this military hegemony did not mean formal occupation of Gyaman, the Abron were nonetheless subject to restraints. Among these was Asante restriction on the Abron trading directly with coastal factories. In 1818, an attempt by the Abron to break this Asante control ended in military defeat.<sup>50</sup>

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<sup>49</sup> F.J.Kense, 'The Impact of the Asante on the Trade Patterns of Northern Ghana and Ivory Coast'. In Schildkraut (ed.), Golden, p.29.

<sup>50</sup> Handloff, 'Gyaman', pp.252-259.

In addition to control over Gyaman, Asante sought to monopolise the growing kola trade of the early nineteenth century from which the Abron in Bondoukou were ill placed to benefit as they had no control over any of the major kola producing areas.<sup>51</sup> Until then, Bondoukou had been well located as it lay on a major trade route from Kumasi to the Niger basin and another which linked Kong with Hausa land. Goods passing along these routes included kola, gold, guns, slaves, textiles and salt,<sup>52</sup> and the Dioula dominated much of this trade. For the Dioula, trade with Asante was far more important than with the Abron who applied restrictions on the trading of Gyaman gold whilst the exchange of slaves for Kola was on a smaller scale. Thus a combination of Dioula self-interest, geographical location and Asante power conspired against Abron interests in trade. Further, the Dioula consistently opposed Abron resistance to Asante dominance fearing that trade routes would be disrupted, whilst Asante protection of the trading centre of Bouna to the north foiled Abron attempts to eliminate it as a competitor to Bondoukou.<sup>53</sup>

As already illustrated, east-west networks rather than north-south ones predominated in the forest zone prior to the early eighteenth century. European goods came from the Gold Coast and then up to Kumasi from where they went westward into the interior of what is now Ivory Coast, this penetration reaching further westward during the eighteenth century as the Asante empire expanded with the Baoule on the periphery. Because of the direction of trade, these new Baoule migrants were effectively dependent on the Asante empire centred at Kumasi. At the same time, Baoule commercial links with the Asante enabled them to gain both political and military ascendancy over the Gouro and Dida peoples into whose land they were gradually moving.<sup>54</sup>

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<sup>51</sup> *Ibid.*

<sup>52</sup> E.Terray, 'Long-Distance Exchange and the Formation of the State: the Case of the Abron Kingdom of Gyaman', *Economy and Society*, 3, 3 (1974), p.320.

<sup>53</sup> Handloff, 'Gyaman', pp.252-259.

<sup>54</sup> Weiskel, *Peoples*, pp.5-9.

Weiskel attributed this Baoule dominance to "a combination of outright conquest and manipulation of local marriage alliances and advantageous trading connections with the Akan commercial system".<sup>55</sup> The advantageous trading connections Weiskel attributed to language (Akan) and familiarity with Akan trade routes and supply sources.<sup>56</sup> Presumably this would have meant the Baoule had superior access to arms which the Asante purchased from the British, but Weiskel asserted that "the Baule hegemony in the area can be explained more convincingly as the result of a much more gradual process of economic change and social stratification following the progressive integration of the territory into the Akan commercial network" than by extensive military conquests.<sup>57</sup>

The effects of Samori Toure's expansionist military activities had a more dramatic effect on Ivorian trade. A Malinke chief from Mali, he conquered large areas of Mali, Guinea, Ivory Coast and Upper Volta from the 1870s to his final capture by the French in 1898. Increasingly under pressure from French forces, he was several times forced to abandon or partially abandon empires to seek new ones beyond French power until making what proved to be his last conquest, northern Ivory Coast.<sup>58</sup> His destruction of the commercial centres of Kong, Dabakala and Bouna in the 1890s, together with the increasing French penetration, forever changed the patterns of trade. From being at the hub of West African trade before and during the nineteenth century, these northern centres rapidly became the commercial and political backwaters which they remain to this day. Their decline is most clearly illustrated by population figures: Bouna had a population of around ten thousand in 1885,<sup>59</sup> but had declined to around one thousand by 1904.<sup>60</sup> The destruction of these towns also meant the destruction

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<sup>55</sup> *Ibid.*, p.6.

<sup>56</sup> Weiskel, 'Frontier', pp.265-268.

<sup>57</sup> Weiskel, *Peoples*, p.7.

<sup>58</sup> Person, *Samori*, pp.20-21; Mundt, *Dictionary*, p.128.

<sup>59</sup> J. Boutillier, 'Notes préliminaires à l'étude de la ville de Bouna', *Les petits villes de Cote d'Ivoire*, ORSTOM, 1, 1 (Abidjan, 1968), p.104.

<sup>60</sup> *Ibid.*



of Dioula political and, to a lesser extent, commercial power though the latter was not solely a result of Samori's conquests.

The other main effect of Samori's conquests on Ivorian trade was the large number of slaves these generated. This boost to the internal slave trade was especially beneficial to the Dioula and was the principal link in trade between the northern and southern fringes of the forest zone and beyond for much of the latter half of the nineteenth century. Slaves from the north were exchanged for kola, guns and other European goods coming from the forest zone peoples, especially the Baoule, and Asante.<sup>61</sup> Thus, whilst Samori's empire to the north initially boosted Ivorian trade as slaves became readily available and guns much demanded, the long term effects were negative because of the destruction of three of the four major commercial centres in northern Ivory Coast. The fourth, Bondoukou, also declined as it depended on the trade routes which passed through the north-east which Samori destroyed.

In summary, the combined effects of the Samori and Asante empires were largely detrimental to the interests of potential Ivorian traders. The region subjected to Samori's scorched earth policy has never really recovered as the ruins of the cities of Kong and Dabakala testify<sup>62</sup> though had this region been of the same fertility as southern and central Ivory Coast which have prospered from coffee and cocoa plantations, its economy would have recovered some of its former vitality. The Asante influence had mixed results: on the one hand, potential Ivorian traders were suppressed lest they challenged Asante commercial interests. On the other, Baoule links with the Akan trading network played an important part in their becoming involved in trade. For much of the period between the initial Baoule migrations and the mid nineteenth century when the Quaqua coast began to open up to external commercial demands, the only means the Baoule had of obtaining European goods was through Asante.

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<sup>61</sup> Weiskel, *Peoples*, pp.86-87; Griffeth, 'Dyula', pp.170, 175.

<sup>62</sup> Griffeth, 'Dyula', p.170.

## 2.6 TRADERS AND THE CONSEQUENCES OF "PACIFICATION": WINNERS AND LOSERS, 1893-1918

This section traces the decline of African commercial fortunes and the slow growth of French commercial interests during the 'pacification' years. ETCs arrived relatively late in Ivory Coast compared to other territories in West Africa. In the seventeenth century trading forts were doing brisk business on the Gold Coast<sup>63</sup> and French interests were established in Senegal.<sup>64</sup> In Ivory Coast, it was not until the 1870s that Verdier's Compagnie Francaise de Kong and the British company Swanzy were firmly established. Verdier controlled most of the European trade and, as official resident from 1878 to 1885, the political scene as well. By successfully delaying direct colonial rule, Verdier was able to use his political power locally to limit competition from African traders. Additionally, he could handle conflicts between chiefs to his own benefit and to the detriment of the interests of his European competitors.<sup>65</sup>

As can be seen from Map 5, the first area of the new colony to be 'pacified' was the coastal region. Where possible, agreements were struck with local chieftains allowing customs posts to be set up peacefully, as happened at Grand Bassam and Assinie in 1889.<sup>66</sup> However, villagers further west were less receptive and it was only after the use of a gunboat and the imposition of heavy fines that posts were installed at Grand Jack and Half Jack (now Jacqueline) in 1890. Later that year, fifteen locals were killed resisting the French at Grand Lahou<sup>67</sup> but by the end of 1891, the

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<sup>63</sup> K.Y.Daaku, 'Trade and Trading Patterns of the Akan in the Seventeenth and Eighteenth centuries'. In Meillassoux (ed), Indigenous, pp.168-181.

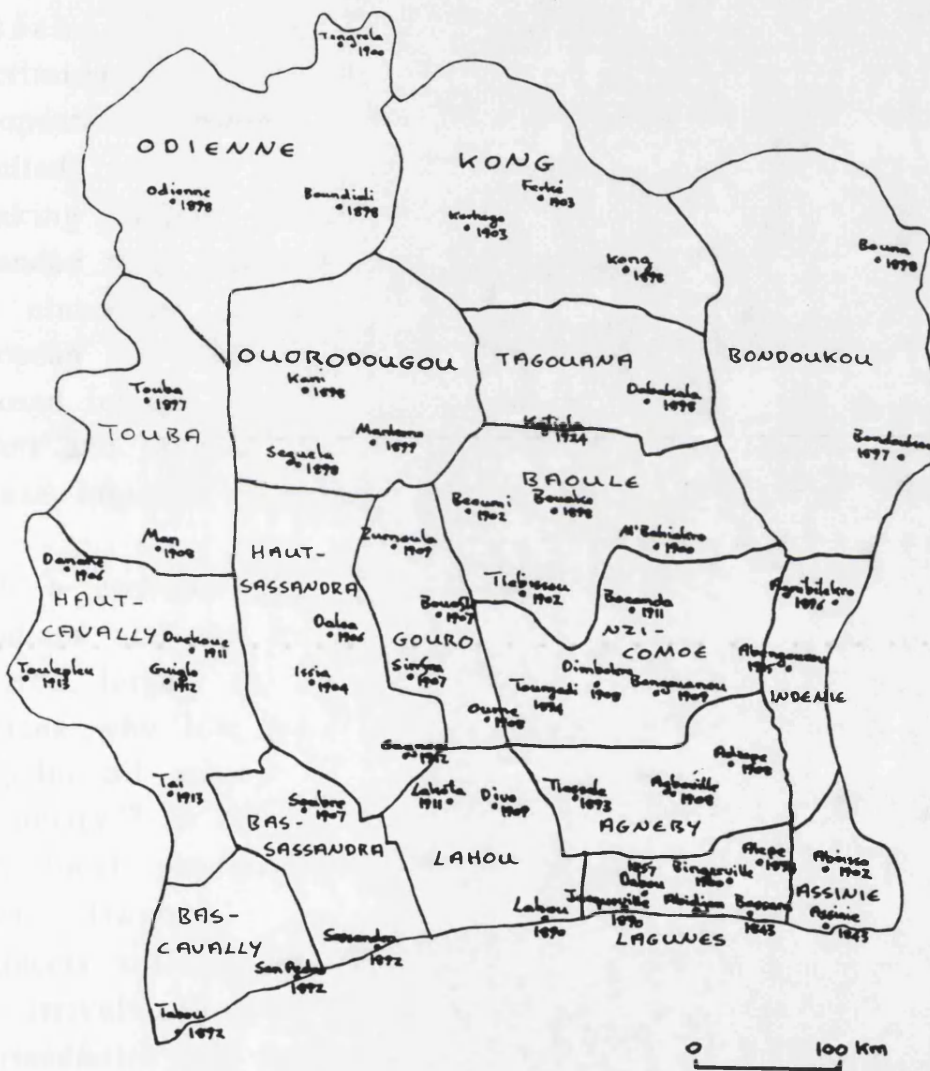
<sup>64</sup> Hargreaves, France, pp.73-86; R.E.Handloff (ed.), Mauritania: a Country Study (US Government, Department of the Army, Washington DC, 2nd edition, 1990), p.11.

<sup>65</sup> S. Cooney, 'Overseas Companies as Transnational Actors during the European Conquest of Africa', British Journal of International Studies, 6 (1980), p.173; P.Atger, La France en Cote d'Ivoire de 1843 à 1893 (Université de Dakar, Dakar, 1962), pp.80-96.

<sup>66</sup> Weiskel, Peoples, p.35; Niangon-Bouah, 'Historique'.

<sup>67</sup> Weiskel, Peoples, pp.35-38.

MAP 5: PRINCIPAL ADMINISTRATIVE CENTRES AND DISTRICTS (with foundation dates), IVORY COAST 1912-16



Sources: ORSTOM and IGT, *Atlas*, section D1a; P.Kipre, *Villes de Cote d'Ivoire*, tome 1 (NEA, Abidjan, 1985), pp.89-134.

French had secured fiscal control of the coast through seven customs posts.<sup>68</sup>

The declaration of Ivory Coast as a French territory in 1893 also presented the new Governor, Binger, with the opportunity to squeeze out Anglophone influences - British companies, Sierra Leoneans and Liberians - along the coast from Tabou to Sassandra.<sup>69</sup> Prior to this, during Verdier's *residence*, discriminatory measures had been taken against non-French European companies and many Anglophone blacks were also expelled from the territory.<sup>70</sup> Among those to suffer were English-speaking Nzima traders from western Gold Coast who had expanded their activities into every major town in the area by the late nineteenth century. Their dominance in the distribution of European and other goods in the interior of the coastal region was opposed by the French as a hindrance to the expansion of French traders and because of the Nzima's British connection at a time of intense imperial rivalry.<sup>71</sup>

With a customs post at Jacquville, trade between the local Alladians and the British, Liberian and Sierra Leonean interests suffered, largely to the detriment of the prosperity of indigenous Ivorians who lost their trading partners.<sup>72</sup> A decline in the price of palm oil around the same time further undermined Alladian prosperity<sup>73</sup> as did the establishment of ETCs which dealt directly with local producers or through chiefs, thereby cutting out intermediaries.<sup>74</sup> At Grand Lahou, the local Avikam rubber producers suffered because of the imposition of French customs, the arrival of first Nzima and then French and Senegalese intermediaries and finally the collapse of rubber prices in 1913.<sup>75</sup>

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<sup>68</sup> Hargreaves, *Partitioned*, p.53.

<sup>69</sup> Kipre, *Villes*, tome 1, pp.89-95.

<sup>70</sup> Niangoran-Bouah, 'Historique'.

<sup>71</sup> Weiskel, *Peoples*, pp.83-84.

<sup>72</sup> G.Courreges, 'Jacquville'. In Courreges, *Comptoirs*.

<sup>73</sup> Weiskel, *Peoples*, pp.35-36.

<sup>74</sup> Auge, 'Organisation', p.156.

<sup>75</sup> G.Courreges, 'Grand Lahou'. In Courreges, *Comptoirs*; Lauer, 'Doo', p.89.

The eventual establishment of customs posts in key towns like Tiassale near the end of the century spelt the end of the dominance of the African trader. In 1891, three French missions from Grand Lahou into the Baoule interior failed.<sup>76</sup> This was but the beginning of over twenty years of Baoule resistance.<sup>77</sup> Further north, the supply of slaves was cut off by the French at Bouake in 1898. The effects of this were felt not only by the Dioula but also by their trading partners, the northern Baoule chiefs who, short on slaves to trade, could not repay their debts for European goods purchased through the exchange of slaves with the southern Baoule. Thus the economic situation of both the Dioula and the Baoule was weakened.<sup>78</sup>

But the French attitude towards the Dioula was not detrimental in all contexts. Dioula interests in the south were promoted by the French above those of the Anglophone Nzima. They were seen by the French as a vital link between European commercial interests and the mass of potential African consumers. One example of this was the way they integrated European goods into African trade by purchasing rubber, coffee and cocoa from indigenous producers to sell to European trading houses and peddling European goods to the producers of these primary products. Hence Lewis described the French view of the Dioula as "a catalyst, an agent de change, inducing an upward spiral of economic growth ultimately beneficial to the indigenes as well as the colonial power".<sup>79</sup> Their decline, when it came, was rapid and due to a combination of factors.

The already mentioned restrictions on the slave trade were followed in 1908 by the outlawing of slave ownership. The French also imposed a head tax from 1910 and restricted the trade in guns.<sup>80</sup> These factors, combined with the increasing volume of cheap manufactured cloth from Europe which led to a fall in prices

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<sup>76</sup> Hargreaves, Partitioned, pp.53-54; Auge, 'Organisation', p.156.

<sup>77</sup> Weiskel, Peoples, pp.33-210.

<sup>78</sup> Ibid, pp.86-91, 109-110.

<sup>79</sup> Lewis, 'Dioula', p.288.

<sup>80</sup> Weiskel, Peoples, pp.178-182; Launay, Traders, p.80. In some areas the tax was imposed earlier. See Mundt, Dictionary, pp.81-82.

for Dioula weavers situated predominantly in the north,<sup>81</sup> deprived the Dioula of both labour (slaves were used for portage) and capital. In 1913 the government barred them from trading in Gouro areas. This was ostensibly to avoid hostility from the local population but, Meillassoux claimed, the real reason was to remove competition to European concerns. The Gouro were now obliged to sell their produce to Europeans in Dimbokro or Bouake.<sup>82</sup>

Although the north remained relatively calm throughout these years,<sup>83</sup> the Senoufo, Malinke and others still had to pay taxes and supply labour like the rest of the territory.<sup>84</sup> Others like the Dan in the west and the Abe in the south east were less inclined to do so without a fight. In 1908 five Dan villages were burnt and the people fined. In 1910 the Abe rebelled and, true to Governor Angoulvant's form, were brutally suppressed with severed heads displayed on pikes in villages and railway stations.<sup>85</sup> In 1911 the Chambre de Commerce expressed concern at the effects on trade of the migration of eastern Ivorians to Gold Coast to escape the harsh French head tax.<sup>86</sup> The years up to 1914 were thus ones of repression, taxation and forced labour for Ivorians.

As the French imposed their rule so they were able to introduce the franc at the expense of local currencies such as gold dust, cowries and *manilles* (iron rods weighing about 140 grams), as well as English currency, widely used in the east from the 1890s. The diffusion of the franc in the territory was aided by administrative restrictions on the use of local currencies, the

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<sup>81</sup> Launay, Traders, p.83.

<sup>82</sup> C.Meillassoux, Anthropologie économique des Guro de Cote d'Ivoire (Mouton, Paris, 1964), p.300.

<sup>83</sup> The reasons for this are probably in part related to the Samori wars, the politics of the Senoufo chief Gbon Coulibaly and the terrain. See Launay, Traders, pp.13-47; Mundt, Dictionary, p.47; Foreign Office, Ivory Coast (Handbooks prepared under the direction of the Historical Section of the Foreign Office - No 117, 1919), pp.9-10; Lewis, 'Dioula', pp.273-307.

<sup>84</sup> J.B.Webster, A.Adu Boahen and M.Tidy, West Africa since 1800 (Longman, new edition, 1980), pp.187-188; Mundt, Dictionary, pp.68-69.

<sup>85</sup> Manning, Francophone, pp.64-65; Cangah and Ekanza, Textes, pp.105-108.

<sup>86</sup> ANCI, carton 1QQ8 / file V-11-275: Chambre de Commerce, Procès-verbal de la 1er séance du 13 fevrier 1911, .

presence of troops with money to spend and, most significantly, its rapid adoption by indigenous traders, especially the Dioula.<sup>87</sup> Africans found "they were no longer tied to the firm which bought their produce"<sup>88</sup> and thus "embraced the new system willingly because it gave them the means of striking a better bargain".<sup>89</sup> Nonetheless, it is likely that some lost out on conversion as happened in southern Nigeria.<sup>90</sup> European firms were not so enthusiastic though: Verdier was amongst those who opposed it<sup>91</sup> because "as long as barter and transitional currencies remained firmly entrenched, newcomers were at a severe disadvantage, for they had to master the complexities of a pre-industrial monetary system, itself a serious barrier to entry".<sup>92</sup>

Even by the first world war there were no European trading stations in the west and centre west regions of the territory<sup>93</sup> probably in part because 'pacification' was not yet complete<sup>94</sup> and in part because many of what are now large or medium sized towns were then little more than villages.<sup>95</sup> There were also no railways and few if any all-weather roads. There was thus a marked concentration of trading outlets in regions which had been 'pacified' and/or had some form of transport. Among the companies represented in the various towns were Erbe Freres, Compagnie Bordelaise des Comptoirs Africains, Seguir et Goux, Compagnie Commerciale de la Cote d'Afrique (CICA),<sup>96</sup> Compagnie

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<sup>87</sup> Y.d'Alepe, 'L'imposition de la monnaie française en Côte d'Ivoire au début du XX<sup>ème</sup> siècle', IHAAA, 10 (juin 1988), pp.81-99; Hopkins, Economic History, pp.150-151.

<sup>88</sup> Hopkins, Economic History, p.150.

<sup>89</sup> Ibid., p.151.

<sup>90</sup> See J.S.Hogendorn and H.A.Gemery, 'Continuity in West African Monetary History? An Outline of Monetary Development', AEH, 17 (1988), pp.138-139.

<sup>91</sup> d'Alepe, 'Monnaie', pp.94-97; Hopkins, Economic History, p.151.

<sup>92</sup> Hopkins, Economic History, p.151.

<sup>93</sup> Kipre, Villes, tome 2, p.40.

<sup>94</sup> ORSTOM and IGT, Atlas de Côte d'Ivoire (Ministère du Plan, Abidjan, 1979), section D1a.

<sup>95</sup> Kipre, Villes, tome 1, pp.69-82.

<sup>96</sup> ANCI, 1QQ2/V-4-211: letter (1910): letter from Compagnie Bordelaise des Comptoirs Africains (1910): letter from Seguir et Goux (1910): letter from Compagnie Commerciale de la Côte d'Afrique (1910).

Francaise de la Cote d'Ivoire (CFCI)<sup>97</sup> and Compagnie Francaise de l'Afrique Occidentale (CFAO, which had bought out Swanzy's interests).<sup>98</sup>

TABLE 1: NUMBER OF EUROPEAN TRADING OUTLETS IN IVORY COAST TOWNS, 1914-15

| TOWN         | REGION     | NUMBER OF OUTLETS |
|--------------|------------|-------------------|
| ABIDJAN      | SOUTHEAST  | between 10 and 14 |
| AGBOVILLE    | SOUTH EAST | between 1 and 4   |
| ALEPE        | SOUTH EAST | between 1 and 4   |
| ASSINIE      | SOUTHEAST  | between 5 and 9   |
| BONDOUKOU    | EAST       | between 1 and 4   |
| BOUAKE       | CENTRE     | between 10 and 14 |
| DABAKALA     | NORTH      | between 5 and 9   |
| DABOU        | SOUTH EAST | between 1 and 4   |
| DIMBOKRO     | CENTRE     | between 10 and 14 |
| GRAND BASSAM | SOUTH EAST | 15 or more        |
| GRAND LAHOU  | SOUTH WEST | between 10 and 14 |
| KORHOGO      | NORTH      | between 5 and 9   |
| ODIENNE      | NORTH      | between 1 and 4   |
| SASSANDRA    | SOUTH WEST | between 10 and 14 |
| SOUBRE       | SOUTH WEST | between 1 and 4   |
| TABOU        | SOUTH WEST | between 1 and 4   |
| TIASSALE     | SOUTH EAST | between 5 and 9   |
| TOUMODI      | CENTRE     | between 5 and 9   |

Source: Kipre, *Villes*, tome 2, p.40.

However, this European presence was uncertain and impermanent in the early years and some companies seem to have been taken over by others. For example, in Korhogo there was subsequently a decline in outlets for by 1923 there were only three left.<sup>99</sup> At Tiassale in 1906 there were 49 trading interests, owned by French and British as well as Senegalese, Guinean, Sierra Leonean, Fanti and others,<sup>100</sup> but the outbreak of war in 1914 caused many of the European concerns to withdraw. Similarly, in 1914, there were five ETCs at Zuenuela, two at Sinfra and six at Bouafle but by the beginning of 1915 all had left due to the economic effects of the

<sup>97</sup> ANCI, 5356/QQ-XV-23-9: 'Activités de la CFCI en Cote d'Ivoire' (1939).

<sup>98</sup> Mundt, *Dictionary*, p.44.

<sup>99</sup> ANCI, 1QQ82/XX1-12-4: report, 'Cercle de Kong' (1923).

<sup>100</sup> Weiskel, *Peoples*, p.157.



war. In 1919 there was only one shop in the region at Sinfra.<sup>101</sup> Even Dimbokro, reaping the benefits of the newly constructed railway line with thirteen commercial houses opening up between 1910 and 1915, did not emerge unscathed as many had departed by 1920.<sup>102</sup> Where there was a trading station there was also an administrative or military post but the presence of one or the other of the latter did not necessarily imply the presence of the former. For example, in 1914-15, there were administrative or military posts at Man, Toulepleu, San Pedro, Daloa, Guiglo, Seguela, Ferkessedougou, Bouna and Abengourou but none of these towns had a European trading company presence.<sup>103</sup>

Another major problem for trading firms was transport. As van der Laan observed "While the rate of advance of an army depends on the ability of the quartermaster to send supplies up, the advance of the firms was restricted by the opportunities to send supplies back".<sup>104</sup> These opportunities were limited up to the First World War, apparently because "the firms were unwilling to buy and store produce unless it could be carried to the coast by European transport."<sup>105</sup> The dense forest in areas not yet 'pacified' might well have made the possibility of African transport both too dangerous and uneconomic as fleeing villagers often took off for the forest with their guns.<sup>106</sup> Consequently, trading posts were located where there were roads, railways or navigable rivers.<sup>107</sup> The late colonisation of Ivory Coast entailed the late development of roads and railways which meant that transport by rivers and lagoons was at first the only means of meeting European requirements. The lagoons were invaluable in this respect for they stretched some 400 Kms from beyond Grand Lahou to Assinie,<sup>108</sup> hence the concentration of outlets in this south coastal region.

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<sup>101</sup> Meillassoux, Anthropologie, p.300.

<sup>102</sup> S.Bredeloup, Negociants au long cours (l'Harmattan, Paris, 1989), p.39.

<sup>103</sup> Kipre, Villes, tome 1, p.119; Kipre, Villes, tome 2, p.40.

<sup>104</sup> H.L.van der Laan, 'Modern Inland Transport and the European Trading Firms in Colonial West Africa', CEA, 21, 84 (1981), p.548.

<sup>105</sup> Ibid.

<sup>106</sup> See, for example, Lauer, 'Doo', pp.75-97.

<sup>107</sup> van der Laan, 'Transport', p.548.

<sup>108</sup> G.Rougerie, 'Le port d'Abidjan', Bulletin de l'Institut Francaise d'Afrique Noir, 12, 3 (1950), pp.762-763.

However, though Ivory Coast has three major rivers, transport by this means was restricted, for the Comoe and the Bandama were navigable for only 60 and 70 kms respectively.<sup>109</sup> Whilst trading between towns like Grand Bassam and Bingerville in 1910 proved feasible,<sup>110</sup> operations with the interior beyond these limits meant African traders coming south to the Europeans rather than Europeans venturing further north. Railway construction did not begin until 1903, ten years after formal colonisation, and it took a further nine years for it to reach Bouake. The 1914-18 war put a halt to construction.<sup>111</sup> The railway also opened up the Baoule interior for the trading houses, greatly stimulating those towns through which it passed - Agboville, Dimbokro and Bouake - as is proven by the number of trading concerns which had installed themselves there by 1915.<sup>112</sup> All-weather roads were virtually non-existent north of Abengourou or west of Dabou before 1920.<sup>113</sup>

The final major factor in determining the location of factories concerned the sources of goods for export. During the first decade of the twentieth century the principal exports were palm oil, timber, rubber, gold dust and palm kernels. These came almost exclusively from the south and especially the south east, hence the early concentration of trading interests in this area.<sup>114</sup> Supply sources become an increasingly important consideration as transport and especially security become more minor factors in the inter-war years (on which more later).

The First World War setback French trade in Ivory Coast. French personnel were in short supply. The Governor General of the AOF, van Vollenhoven, noted that 75% of those employed by the French companies had left by 1917. This exodus also brought a halt to

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<sup>109</sup> L.Gbagbo, 'Notes sur la mise en place des structures coloniales d'exploitation économique de la Cote d'Ivoire (1899-1908)', *IHAAA*, 7 (1981), p.12.

<sup>110</sup> ANCI, 1QQ2/V-4-211: letter, CFAO to Lt.Gov of Ivory Coast (January 5 1910).

<sup>111</sup> ORSTOM and IGT, *Atlas*, section D2a.

<sup>112</sup> Kipre, *Villes*, tome 2, pp.39-40.

<sup>113</sup> Bollinger, *Marketing*, p.49.

<sup>114</sup> Gbagbo, 'Notes', pp.23-30.

most public works,<sup>115</sup> slowing the penetration of the territory by European concerns. At the same time, foreign companies gained at the expense of French ones as British personnel, unlike their French counterparts, were not mobilised.<sup>116</sup> Overall, the war led to a decline in the barter terms of trade in addition to a fall in volume.<sup>117</sup> Conditions for Africans also worsened. Already sparsely populated and under pressure to produce more food for the war effort, young Africans were recruited into the army, thereby further depleting the labour force. Just under seven thousand able bodied men were recruited in 1915-16, mostly against their will. Many evaded recruitment by fleeing from villages into the bush.<sup>118</sup> Others rebelled and "the wide-scale revolts provoked by the recruitment reduced trade in many areas of the Federation".<sup>119</sup> Crowder and Osuntokun also quote the Administrator of the *Cercle* of Ouagadougou as saying "A new exodus of men would be disastrous for the economy".<sup>120</sup> Even the repressive Angoulvant, near the end of his stint in Ivory Coast, warned the Governor-General of the consequences of forced recruitment.<sup>121</sup> In summary, African traders were in a weaker position than ever because of 'pacification' whilst European interests, although not always prospering, gradually began to establish their dominance in the commercial sector.

## 2.7 TRADERS AND THE EXPORT ECONOMY, 1919-1939

The period 1919 to 1939 covers the years when the two-way trade of primary produce exports and manufactured imports became the most influential factor in the economic life of indigenous Ivorians. ETCs, the dominant traders in the Ivorian

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<sup>115</sup> M.Crowder and J.Osuntokun, 'The First World War and Africa'. In J.F.A.Ajayi and M.Crowder (eds.), History of West Africa, volume 2 (Longman, 2nd edition, 1987), p.569.

<sup>116</sup> Ibid., pp.569-570; Crowder, Rule, p.263.

<sup>117</sup> Hopkins, Economic History, p.184.

<sup>118</sup> Crowder and Osuntokun, 'First', pp.558-566; Cangah and Ekanza, Textes, pp.112-113; Lauer, 'Doo', pp.92-95.

<sup>119</sup> Crowder and Osuntokun, 'First', p.569.

<sup>120</sup> Ibid.

<sup>121</sup> Crowder, Rule, pp.260-261.

export-import economy, were typified by large capital resources, access to overseas credit, operations frequently stretching over several colonies and their organised, hierarchical structure.<sup>122</sup> The headquarters were located in a major city of the metropole such as Paris, Bordeaux or London. The next most senior person in the chain of command was usually located in Dakar and had control over his company's operations in French West Africa. Immediately answerable to the Dakar agent were the senior local agents in the colonial capitals. Beneath him were regional agents who in turn controlled perhaps three or four factories in local small towns and villages where produce was bought.<sup>123</sup> Regional agents were European<sup>124</sup> usually living in accommodation close by the store.<sup>125</sup> Factory agents were usually Africans, mostly Senegalese, Fanti or Nzima,<sup>126</sup> a legacy of some of the issues tackled in earlier sections.

For much of this period almost the only consumers of most processed foods were Europeans. Food was never a major trading item between Europe and West Africa before colonisation.<sup>127</sup> Initially, such a trade would have been impractical given the problems of preserving and carrying enough food for a ship's crew from the sixteenth to eighteenth centuries. By the early twentieth century, if not before, items such as tinned meat were available in the territory.<sup>128</sup> The war of 1914-18 led to a decline in processed food imports because of British and French factories manufacturing for war and a lack of sea transport.<sup>129</sup> By the 1920s though there was a fair range available in Ivory Coast,

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122 Gbagbo, 'Notes', p.30.

123 *Ibid*; T.R.Young, West African Agent (Heath Cranton, 1942), pp.25, 38; A.L.Bonnefonds, 'La transformation du commerce de traite en Cote d'Ivoire depuis la dernier guerre mondial et l'independance', Cahiers d'Outre Mer, 21, 84 (1968), pp.396-397.

124 ANCI, 5356/QQ-XV-23-9: 'Activités de la CFCI en Cote d'Ivoire' (1939).

125 Young, Agent, p.74.

126 Gbagbo, 'Notes', p.30.

127 W.O.Jones and C.Merat, 'Consumption of Exotic Consumer Goods as an Indicator of Economic Achievement in Ten Countries of Tropical Africa', Food Research Institute Studies, 3, 1 (February 1962), p.38; Hopkins, Economic History, p.129; Eltis and Jennings, 'Atlantic', pp.936-959.

128 ANCI, IQQ7/V-37-81: AOF, 'Cahier des charges speciales' (1909); ANCI, 1QQ2/V-4-211: invoice, CFAO to Le Service des Travaux Publics (March 1909).

129 ANCI, IQQ8/V-11-275: letter, AOF to Chambre de Commerce (July 31 1915).

mostly imported by the major companies though some delicacies were brought by travellers from Europe and, probably, company and government officials returning from leave. A British agent for Woodins in Ivory Coast in the late 1920s and early 1930s mentions such items as tea, tinned lobster, pickles, macaroni, sausages, sardines and even Chivers' strawberry jelly.<sup>130</sup>

Whilst the years between the war and the depression saw an expansion in the economy, a brief but sharp slump in 1920-21 heralded the dominance of a few large companies in the import-export business.<sup>131</sup> According to Cangah and Ekanza there were eighteen 'principal' import-export firms in 1931, down from thirty two in 1920.<sup>132</sup> Despite this dominance of the large companies in external trade, the twenties boom, modest though it was, allowed the creation of new small enterprises. Of the 237 businesses registered at the Chambre de Commerce in Grand Bassam (the colonial capital) between 1898 and 1930, 83% were founded between 1920 and 1930.<sup>133</sup> Whilst the depression of 1929 put an end to many of smaller operators,<sup>134</sup> the number of companies continued to increase but the big ones became even bigger, partly through takeovers of rivals.<sup>135</sup>

In 1930 the principal companies possessed around 200 trading posts in Ivory Coast.<sup>136</sup> Numbers of the big three (CFAO, Société Commerciale de l'Ouest Africain, or SCOA, and CFCI) rose very rapidly in the years leading up to the war for by 1938 CFCI alone

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<sup>130</sup> Young, Agent, pp.31, 101, 120, 133, 156, 157; ANCI, 1457/X-54-14: Fiche de Renseignements (1936); ANCI, 5294/111-28-25: court notes, divorce case Aka vs. Agba, Abidjan (November 3 1928).

<sup>131</sup> Crowder, Rule, p.287; J.F.A.Ajayi and M.Crowder, ' West Africa 1919-1939: the Colonial Situation'. In Ajayi and Crowder (eds.), History, p.594; Hopkins, Economic History, p.184.

<sup>132</sup> Cangah and Ekanza, Textes, p.139. The authors failed to define 'principal' but were probably referring to companies which imported and/or exported regularly as opposed to those which did so perhaps just once or twice a year.

<sup>133</sup> Kipre, Villes, tome 2, p.36.

<sup>134</sup> Ibid, pp.36-37, 88.

<sup>135</sup> Ibid, p.84.

<sup>136</sup> Ibid, p.41.

had 117 outlets.<sup>137</sup> CFAO also expanded, the company's number of factories in West Africa as a whole approximately doubling to 411 between 1930 and 1939.<sup>138</sup> The only figures available for Ivory Coast show CFAO and SCOA's outlets increasing between 1914 and 1929 from six and seven to 25 and 24 respectively.<sup>139</sup> It was not until after 1931 that the big three really expanded into the northern region,<sup>140</sup> perhaps partly due to the demise or takeover of smaller companies during the depression. Those that survived included Escarre, Trabucato and Commercial du Nord de Cote d'Ivoire (CNCI).<sup>141</sup>

The dominance of imports and exports by the largest companies was a common pattern throughout West Africa: in 1939, seven firms controlled two thirds of external trade.<sup>142</sup> In Ivory Coast in 1938 five firms (Africain Francaise, CFCI, CFAO, SCOA and CICA) handled 68% of exports and 75% of imports (in weight).<sup>143</sup> One important factor in this dominance was the role played by the administration in the early 1930s when the government, under considerable pressure from metropolitan business interests linked to the companies, reduced some export taxes. The reasoning behind this was that the efficient evacuation of resources from overseas territories would be beneficial to the metropole. Whilst all companies benefitted from this, for some it was not enough to stave off liquidation or a takeover and the administration did nothing to prevent the increasing dominance of a few big firms.<sup>144</sup> However, not all colonial administrators were sympathetic to the

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<sup>137</sup> ANCI, 5356/qq-xv-23-9: 'Activités de la CFCI en Cote d'Ivoire' (1939)

<sup>138</sup> E. Assidon, Le commerce captif (L'Harmattan, Paris, 1989), p.21.

<sup>139</sup> P. Braibant, 'L'administration coloniale et le profit commercial en Cote d'Ivoire pendant la crise de 1929', Revue Francaise d'Histoire d'Outre-Mer, 63, 232-233 (1976), p.558.

<sup>140</sup> SEDES, 'Région de Korhogo. Etude de développement socio-économique' (Ministère du Plan, Abidjan, 1965).

<sup>141</sup> Ibid; BDPA, 'Etude de la région d'Odienné-Boundiali: tome 3' (Ministère du Plan, Abidjan, n.d. circa 1963); Fieldwork: discussion with CNCI manager (Nov 1990).

<sup>142</sup> Cangah and Ekanza, Textes, pp.136-137.

<sup>143</sup> P. Kipre, 'Grandes sociétés et entreprises individuelles dans la ville coloniale en Cote d'Ivoire à la veille de la seconde guerre mondiale'. In Laboratoire 'Connaissance du Tiers-Monde', Entreprises et entrepreneurs en Afrique xix et xx siècles, tome 2 (L'Harmattan, Paris, 1983), pp.229-230.

<sup>144</sup> Braibant, 'Profit', pp.555-574.

firms' 'plight' and the companies themselves were mindful that if producers were squeezed too much on the prices they were paid, consumption of imports would be adversely affected. Nonetheless, SCOA and CFAO profits for West Africa as a whole remained healthy until the Second World War.<sup>145</sup> This position of strength was aided by the colonial administration's system of export subsidies from 1935 which favoured the big firms.<sup>146</sup>

Transport in the interwar years became increasingly less of a consideration in firms' decisions where to locate stations. By 1928 the railway had reached Ferkessedougou<sup>147</sup> but by then the lorry was already in use. The European companies' greater capital resources initially enabled them to compete more vigorously with African and Lebanese traders and led to increased penetration of the interior.<sup>148</sup> By 1923 there were 56 *vehicules utilitaires* in Ivory Coast, a figure which rose by 1,118 to 1929 and by 3,180 between 1930 and 1938.<sup>149</sup>

With the increasing using of lorries the road network began to expand but it was not until the 1930s that the northern and western areas became more accessible, aided by other improvements in communications such as the telegraph.<sup>150</sup> Thus the pattern of distribution of trading factories and warehouses in 1929-30 showed a higher than ever concentration of establishments in the south east and along the railway. In the north, Bondoukou, Odienne, Dabakala and Korhogo also declined, their distance from Abidjan and lack of exportable produce probably being crucial. The old trading crossword town of Tiassale, located away from the railway, declined whilst towns in

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<sup>145</sup> Hopkins, Economic History, pp.172-184; C. Coquery-Vidrovitch, 'L'impact des intérêts coloniaux: SCOA et CFAO dans l'ouest Africain, 1910-1965', JAH, 16, 4 (1975), p.596-609.

<sup>146</sup> Kipre, 'Grandes', pp.229-230.

<sup>147</sup> ORSTOM and IGT, Atlas, section D2a.

<sup>148</sup> Meillassoux, Anthropologie, p.301.

<sup>149</sup> Kipre, Villes, tome 2, p.24.

<sup>150</sup> Bollinger, Marketing, p.49.

the centre west and west like Man, Daloa, Gagnoa, Bouafle<sup>151</sup> and Lakota<sup>152</sup> were limited to a few outlets.

Supply sources were also important. The four main producing regions by 1948 were the lagoon areas and the districts of Agboville, Dimbokro and Abengourou.<sup>153</sup> The gradual diversification of supply sources, combined with improved transport facilities, saw a dispersion of trading houses. The distribution of commercial enterprises in 1936 showed that, although the Akan areas were still dominant, the west was fast developing major commercial centres with increased exploitation of the region.<sup>154</sup>

Competing with ETCs were independent operators. These were small scale with low capital resources, often family owned, and run by Europeans, Lebanese or other Arabs. They generally acted as intermediaries between African producers and small traders and big trading houses.<sup>155</sup> The main advantages which independents, particularly the Lebanese, had over the trading houses were flexibility, lower operational costs through the use of family labour, and better knowledge of market conditions and African traders.<sup>156</sup> Compared to other territories such as Senegal and Guinea, the arrival of large numbers of Lebanese in Ivory Coast occurred relatively late.<sup>157</sup> In 1909 there were four,<sup>158</sup> in 1923, 56,<sup>159</sup> and in 1940, 777.<sup>160</sup>

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<sup>151</sup> Kipre, Villes, tome 2, p.41.

<sup>152</sup> D.J.Daligou, 'La pénétration française dans le pays Dida' (Thèse de Doctorat, Université Nationale de Côte d'Ivoire, 1982) pp.90, 92.

<sup>153</sup> Rougerie, 'Port', p.754.

<sup>154</sup> Kipre, Villes, tome 2, pp.91-93.

<sup>155</sup> Kipre, Villes, tome 2, p.44; L.Gbagbo, 'Les entreprises coloniales en Côte d'Ivoire à la veille de la seconde guerre mondiale'. In Laboratoire, Afrique, pp.479-480.

<sup>156</sup> Bauer, Trade, pp.115-118.

<sup>157</sup> M.H.Y.Kaniki, 'The Psychology of Early Lebanese Immigrants in West Africa', Transafrican Journal of History, 5, 2 (1976), pp.139-140.

<sup>158</sup> A.Tirefort, 'Le "Baudit Libanais" ou le mal-aimé - approche de la communauté Libano-Syrienne en Basse Côte d'Ivoire pendant l'entre-deux-guerres', IHAAA, 7 (1981), p.63.

<sup>159</sup> Desbordes, according to Ibid.

<sup>160</sup> ANCI, 2990/V1-37-103: untitled, population by Cercle (1940).



Early Lebanese migrated principally because of economic conditions in Lebanon where land was in short supply whilst agriculture, industry and commerce were in recession. For some the destination was West Africa. But many who had originally intended to go to America never made it because, on reaching Marseilles for an America bound ship, they found the fare beyond their resources, or were tricked into believing that they were heading across the Atlantic but instead found themselves bound for West Africa. Some failed to satisfy U.S. health requirements. A further reason was that West Africa provided plenty of opportunity for self-advancement,<sup>161</sup> where "business offered a challenge to their courage and integrity" and "would enable them to become independent and establish a sense of importance".<sup>162</sup>

Arriving in Ivory Coast, the Lebanese migrant had few options. The administration and agriculture were beyond his reach, the former because of nationality and sometimes illiteracy<sup>163</sup> and the latter for financial reasons. This left them with little option but commerce as it required little starting capital. Beginning as penniless hawkers, many gradually built up enough capital to acquire a business premises, and to bring over relatives from Lebanon. Lebanese outlets were independent in that, unlike the commercial houses, they were rarely financed or directed from outside the territory. Nor were they vertically integrated like ETCs. By the 1930s they were important intermediaries between the trading houses and African producers and traders.<sup>164</sup>

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<sup>161</sup> Kaniki, 'Psychology', pp.139-140; Tirefort, 'Baudit', p.65, Crowder, Rule, p.294; R.B.Winder, 'The Lebanese in West Africa', Comparative Studies in Society and History, 4, 3 (1962), pp.296-298; D.Bigo, 'The Lebanese Community in the Ivory Coast: a Non-native Network at the Heart of Power?'. In A.Hourani and N.Shehadi (eds.), The Lebanese in the World: a Century of Emigration (Centre for Lebanese Studies, 1992), pp.511-512.

<sup>162</sup> Kaniki, 'Psychology', p.140.

<sup>163</sup> Winder, 'Lebanese', p.308.

<sup>164</sup> Bigo, 'Network', pp.511-513; Winder, 'Lebanese', p.307-310; Tirefort, 'Baudit', pp.65-69; J. Binet, 'Les libanais en Afrique francophone', Kroniek van Afrika, 6, 3 (1975), pp.259-262.

The success of Lebanese traders had much to do with the way they organised their enterprises, giving them some important advantages over their rivals. They used family labour to cut costs whilst money was also saved because of a lower personal consumption rate. This meant the Lebanese could trade with lower prices, thereby increasing the number of customers and turnover. A further inducement to African customers was the greater willingness of the Lebanese to grant credit, aided by their ability to judge clients' creditworthiness because of the closer contact they had with Africans than did Europeans.<sup>165</sup>

Another advantage of the Lebanese over trading houses was flexibility. The independent trader did not have to wait for orders from above to raise or cut prices and thus he was better able to adapt to rapidly changing market conditions.<sup>166</sup> The Lebanese were also willing to locate enterprises in small towns as yet commercially unexploited by Europeans, being afraid neither of the harsh living conditions nor the financial risk involved.<sup>167</sup> In terms of cumulative advantages, second and subsequent generations of Lebanese were well placed. Many were brought over by relatives who had made good<sup>168</sup> and the obvious career after working for the relative was one where the experience gained could be used.

According to 1940 census figures, there was a marked concentration of Lebanese in the south east and centre of the territory. Bondoukou excepted, there were no Lebanese north of a line running from Abengourou to Bouake to Man.<sup>169</sup> This pattern corresponds to the main produce gathering areas and is probably an indication of the emphasis they placed on acting as intermediaries between buyers and producers. The majority of other Lebanese worked with coffee and cocoa in the Gagnoa-Daloa region.<sup>170</sup>

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<sup>165</sup> *Ibid*; Bauer, *Trade*, pp.115-118.

<sup>166</sup> *Ibid*.

<sup>167</sup> Bigo, 'Network', p.512; Kipre, 'Grandes', pp.231-232.

<sup>168</sup> Bigo, 'Network', p.512; Winder, 'Lebanese', p.301.

<sup>169</sup> ANCI, 2990/V1-37-103: untitled, population by Cercle (1940).

<sup>170</sup> Bigo, 'Network', p.512.

Since the early colonial years African traders operated under the most difficult conditions. Few owned stores: most were involved either in long distance trade, hawking or as intermediaries during the colonial period<sup>171</sup> but some had substantial resources.<sup>172</sup> As in the precolonial years, the Ivorian trader remained almost a stranger in his own country when dealing with fellow 'professionals'. Whilst elements of the indigenous population undoubtedly benefited from the colonial export economy, the majority found life difficult under the dual burdens of the head tax and forced labour which had first been imposed before the 1914-1918 war. Witness the continuing migration from eastern Ivory Coast into Ghana: estimates of the numbers involved run into the tens of thousands seeking the more liberal British rule.<sup>173</sup> The immediate post war period saw few gains for Africans except perhaps in one area: the departure of many French administrative and commercial personnel during the war had necessitated training Africans for jobs previously held by Europeans.<sup>174</sup> However, in 1918-19 there were only 50 Ivorians attending colonial schools as against 72 from the much smaller colony of Dahomey.<sup>175</sup>

During the 1920 slump it was African commercial interests that suffered the most as their capital reserves were inadequate to see them through difficult times. Once the Great Depression hit, few survived in the import-export business.<sup>176</sup> In internal trade, Africans faced increasing competition from the Lebanese who began to replace them as the principal intermediaries between producers and exporters.<sup>177</sup> They also suffered from the

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<sup>171</sup> Weiskel, *Peoples*, p.157; Kipre, *Villes*, tome 1, pp.143-148; Kipre, *Villes*, tome 2, pp.95, 118; Bredeloup, *Negociants*, p.40; Bollinger, *Marketing*, pp.55-56.

<sup>172</sup> Kipre, *Villes*, tome 1, p.161 cites the Fanti trader Morgan Dougan at Tiassale who, in 1903, was wealthy enough to purchase a steam boat.

<sup>173</sup> A.I.Asiwaju, 'Migrations as Revolt: the Example of the Ivory Coast and the Upper Volta Before 1945', *IAH*, 17, 4 (1976), pp.577-594.

<sup>174</sup> Crowder, *Rule*, pp.262-263.

<sup>175</sup> See Cangah and Ekanza, *Textes*, pp.157-158.

<sup>176</sup> Ajayi and Crowder, 'Situation', p.594.

<sup>177</sup> *Ibid.*, pp.594-595; Crowder, *Rule*, p.294.

increasing competition of European outlets in interior towns which would have stifled any emergence of African wholesalers of processed food. All that was left was the trade in such items as kola and dried fish: even the trans-Saharan trade no longer offered the chance to make fortunes as coastal sources were now a cheaper alternative.<sup>178</sup>

With a few exceptions, it was not until the early 1930s that Africans acquired interests in motorised transport,<sup>179</sup> by which time it can be argued that ETCs and the Lebanese were too firmly entrenched to be dislodged easily. Given that Ivory Coast was a settler economy with African plantation owners discriminated against, especially concerning forced labour, the inability to accumulate the necessary starting capital probably dictated the late development of African transporters. Even after World War Two most were involved in carrying passengers rather than goods,<sup>180</sup> African traders and planters not having the resources to compete with the Lebanese. The settlers presence thus appears to have been crucial, their moving to Ivory Coast influenced perhaps by the lack of production for the market during the precolonial period. The use of forced labour would have reinforced the settler dominance over indigenous planters.

The Depression that began in 1929 saw tax rates for Francophone Africans effectively double by 1934 due to the fall in export prices.<sup>181</sup> This left less to spend on non-essential goods which in turn meant a decline in internal trade and fewer opportunities for Africans as well as others in trade.<sup>182</sup> The pattern of the location of African establishments in 1936 showed some interesting variations from those of the Lebanese and ETCs. For Africans, three of the four towns with over twenty outlets were in the west or centre west (Daloa, Guiglo and Danane). Some western towns had no European presence but between 11 and 20 African outlets

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<sup>178</sup> Crowder, Rule, p.294.

<sup>179</sup> Ibid. p.44.

<sup>180</sup> C.Boone, 'Commerce in Cote d'Ivoire: Ivorianisation without Ivorian Traders', JMAS, 31, 1 (1993), p.76.

<sup>181</sup> Manning, Francophone, p.51.

<sup>182</sup> Ajayi and Crowder, 'Situation', pp.596-597.

(Toulepleu, Tai).<sup>183</sup> The probable explanation for this was that the isolated location of these towns meant there was less competition.

Of the African traders in the territory many were non-Ivorians. These included Senegalese, Nzima, Mossi, Fanti, Dahomeans and Togolese in addition to Ivorian Alladians and Dioula.<sup>184</sup> For Ivorians the export economy was probably a more attractive option. The smallholder could earn more than a district commissioner in the 1920s<sup>185</sup> and they were more likely to own land than foreign Africans. However, the decline in export prices in the 1930s meant they had to work harder for less reward<sup>186</sup> whilst, at the same time, the administration continued to provide forced labour to French competitors.<sup>187</sup> There would thus have been less time for Ivorians to trade on the side. In summary, the years 1919 to 1939 saw the dominance of a few big ETCs in the two-way trade, the continued undermining of African commercial interests and a steady increase in the influence of Lebanese traders.

## 2.8 TRADERS, ECONOMIC DIVERSIFICATION AND NEW COMMERCIAL OPPORTUNITIES, 1940 TO CIRCA 1956

The theme of this section is the diversification of the economy and the mixed implications this had for European, Lebanese and African traders. The Second World War had a similar impact on Ivory Coast as in other Francophone territories. Until the fall of France, the colony was required to supply goods for the metropole. However, maritime transport was restricted: only 50% of the banana crop for the first half of 1940 was exported. Additionally, the increased price of petrol made internal transport

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<sup>183</sup> Kipre, Villes, tome 2, p.91.

<sup>184</sup> Weiskel, Peoples, p.157; Kipre, Villes, tome 1, pp.143-148; Kipre, Villes, tome 2, pp.95, 118; Bredeloup, Negociants, p.40.

<sup>185</sup> M.Gbetibouo and C.Delgado, 'Lessons and Constraints of Export Crop-Led Growth: Cocoa in Ivory Coast'. In I.W.Zartman and C.Delgado (eds.), The Political Economy of Ivory Coast (Praeger, New York, 1984), p.121.

<sup>186</sup> Manning, Francophone, p.51.

<sup>187</sup> Hopkins, Economic History, p.220.

more expensive and other items also saw sharp price increases. For example a machete which cost five or six francs in 1939 cost 15 or 20 francs in 1940.<sup>188</sup> Disruption to peoples' daily lives was inevitable as extra demands were made. But almost before the mobilisation of resources had begun, France fell to the German onslaught.<sup>189</sup>

From July 1940 to November 1942, Ivory Coast was under Vichy control and thus blockaded by Allied forces.<sup>190</sup> Exports fell from 173,600 tonnes in 1939 to 47,100 tonnes in 1943 and imports from 105,200 tonnes to 18,400 tonnes for the same years.<sup>191</sup> Rationing was imposed and distribution controlled through the trading houses, much to the ire of elite Africans who found they were not among the priority recipients of concentrated milk and other processed foods.<sup>192</sup> For the non-elite, rationing probably meant little as the demise of export crops meant less cash income and because the French territories were self-sufficient in essential foodstuffs.<sup>193</sup> Needless to say, African traders in manufactured imports became even more marginalised whilst African producers were overtly discriminated against. For example, African planters had to pay 75 francs for a machete during Vichy whilst the favoured European planters paid only 25 francs.<sup>194</sup>

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<sup>188</sup> L.Gbagbo, La Cote d'Ivoire: économie et société à la veille de l'indépendance (1940-1960) (Harmattan, Paris, 1982), pp.8-14.

<sup>189</sup> Crowder, Rule, p.496; P.Anyang' Nyong'o, 'The Development of Agrarian Capitalist Classes in the Ivory Coast, 1945-1975'. In P. Lubeck (ed.) The African Bourgeoisie (Lynne Rienner, Boulder, 1987), p.231 (footnote 9).

<sup>190</sup> N.Lawler, 'Reform and Repression Under the Free French: Economic and Political Transformation in the Cote d'Ivoire, 1942-1945', Africa, 60, 1 (1990), p.88; Hopkins, Economic History, pp.184-185.

<sup>191</sup> AOF, Commerce extérieur de la Cote d'Ivoire et de la Haute Volta de 1931 à 1954 (Service de la Statistique et de la Mécanographie, Paris, 1955), pp.37-38. Figures include Upper Volta, about 10% of the total.

<sup>192</sup> A.R.Zolberg, One Party Government in the Ivory Coast (Princeton University Press, Princeton, revised edition, 1969), p.61; ANCI, 5634/XV-6-45/46, circular, Affaires Economiques, 'Rectificatif à l'arrêté 3741 AE du 17-11-1942': circular, Affaires Economiques, 'Ravitaillement des Cercles' (August 11 1943).

<sup>193</sup> M.Crowder, Colonial West Africa (Frank Cass, 1978), pp.275-276; J.Summerscales, 'The War Effort of the French Colonies', Journal of the Royal African Society, 39, 155 (1940), p.125.

<sup>194</sup> Gbagbo, Société, p.22.

With the switch to Free French rule, conditions for Africans worsened as rationing continued and *Cercle* administrators were given unrealistic production targets for goods like rice which also meant heavier labour burdens on Africans. One *Cercle* administrator, on being ordered to supply honey and perhaps impatient with his superiors' ignorance of local resources, replied with a telegram reading "Agreed Honey Stop Send Bees."<sup>195</sup> Efforts to control the rice trade angered trading houses and Africans alike as artificially low prices were imposed. African traders were better off in Gold Coast where imported goods were more abundant and cheaper as rationing was less strictly enforced.<sup>196</sup> Perhaps the best summary of this period for Africans is provided by Lawler: "low [producer] prices, scarce imports, groups uninvolved in cash markets, and poor working conditions."<sup>197</sup>

The political and social reforms which were to occur over the next fifteen years had little direct effect on commercial activities except in two, albeit very important, areas. The first was the increasing likelihood of independence, a reality which helped lead to changes in ETC commercial strategies. The other area was the abolition of forced labour in 1946,<sup>198</sup> an event which proved an enormous boon to Ivorian peasants who were now well placed to abandon any needs or desires to engage in less financially secure tertiary activities.

From 1903 to 1946 public investment in French West Africa amounted to an estimated CFA 46 billion (1956 values). Between 1947 to 1956 CFA 170 billion was pumped into the colonies under the Fonds d'Investissement pour le Développement Economique et Social (FIDES).<sup>199</sup> As Suret-Canale remarked, "circumstances (France and Europe were in ruins) led to plans for a more

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<sup>195</sup> Lawler, 'Reform', p.94.

<sup>196</sup> *Ibid.*, pp.95-96; M.Crowder, 'The 1939-45 War and West Africa'. In Ajayi and Crowder, *History*, p.677.

<sup>197</sup> Lawler, 'Reform', p.96.

<sup>198</sup> J.Suret-Canale, 'French Tropical Africa: the Economic Background.' In P.Gifford and W.R.Louis (eds.), *The Transfer of Power in Africa*, (Yale University Press, New Haven, 1982), pp.450-451.

<sup>199</sup> E.J.Berg, 'The Economic Basis of Political Choice in French West Africa', *American Political Science Review*, 54, 2 (1960), pp.394-395.

systematic and rational development of resources which the trade economy had theretofore left fallow".<sup>200</sup> This expense was justified because "The metropole decided to make capital investments . . . to foster an economic development by which it would profit".<sup>201</sup> Further, with increasing agitations for greater indigenous political participation, the French were doubtless aware that "political choice is conditioned by the nature of economic development".<sup>202</sup> There was little industry and the infrastructure was underdeveloped, largely because Ivory Coast as "a 'national' economy has never developed. The productive coastal regions have been tied to the world market rather than to their own hinterlands".<sup>203</sup> Berg illustrated this point well when he stated that

In 1951 the littoral fringe of F.W.A.....grouped about 7 million people in 500,000 square kilometres. From this region came 91 per cent of the value of exports in that year; the 'continental sector' of around 12 million people and four million square kilometres produced the rest<sup>204</sup>

As private capital was only forthcoming when profits were "immediate, assured, and high", it was left to public resources to be used to develop and modernise transport and communication facilities to create a national market. There was also a perceived need for planning as initiated in Europe.<sup>205</sup>

Of the funds made available for investment in production, much went into agriculture but little directly to industry. More important were the results of the large investments in infrastructure.<sup>206</sup> The Vridi canal was opened in 1950, the road network increased substantially (634 km of tarmac was laid down between 1948 and 1961) and investments were made in

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<sup>200</sup> Suret-Canale, 'Background', p.451.

<sup>201</sup> Y.Person, 'French West Africa and Decolonisation.' In Gifford and Lewis, Power, p.144.

<sup>202</sup> Berg, 'Choice', p.391

<sup>203</sup> Ibid, p.400.

<sup>204</sup> Ibid, p.399.

<sup>205</sup> Suret-Canale, 'Background', p.451.

<sup>206</sup> Ibid, pp.452-453; Berg, 'Choice', p.392; Gbetibouo and Delgado, 'Lessons', p.122; Zolberg, One Party, p.165.



improving lagoon transport.<sup>207</sup> Ivory Coast and the other colonies became even more dependent on France economically (which partly explains most African leaders hesitancy in pursuing independence). The metropole dominated external trade, subsidised some exports, had created the not unbeneficial but dependency re-inforcing Franc zone and effectively ran the economy and administration because of a lack of Africanisation of managerial posts. Sudden withdrawal of these 'facilities' would have been severely disruptive economically, politically and socially (as Guinea found out to its cost).<sup>208</sup> Such an environment held considerable benefits for foreign commercial interests. As Suret-Canale remarked,

The mechanisms of the franc economic zone and a general regulation of markets turned the French-ruled parts of black Africa into the equivalent of a licensed game park for French companies and economic institutions.<sup>209</sup>

The years 1946-52 proved to be profitable for the established European commercial concerns as a variety of circumstances combined in their favour, one of these being rationing. Rationing, with the exception of milk, was abandoned in September 1949 but not before much discontent over the handling of the distribution of rationed goods. According to Thompson and Adloff the government first allocated the importation of "goods to traders on the basis of seniority".<sup>210</sup> The exact meaning of this phrase is not made clear but it may be reasonable to assume that seniority was judged on the basis of either the oldest established firms or size of operation or else a combination of both. Any of these criteria would have favoured the big ETCs. Objections to this system were so strong that in 1949 half of the goods were allocated according to demand to traders who did not qualify through 'seniority'. Shortly after, the 'seniority' system was dropped altogether.<sup>211</sup>

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<sup>207</sup> ORSTOM and IGT, *Atlas*, section D2a.

<sup>208</sup> Suret-Canale, 'Background' pp.445-481; Berg, 'Choice', pp.401-405; M.Crowder and D.Cruise O'Brien, 'Politics of Decolonisation in French West Africa, 1945-1960'. In Ajayi and Crowder (eds.) *History*, pp.759-760.

<sup>209</sup> J.Suret-Canale, *Essays on African History* (Hurst and Co, 1988), p.222.

<sup>210</sup> V.Thompson and R.Adloff, *French West Africa* (Allen and Unwin, 1958), pp.436-437.

<sup>211</sup> *Ibid.*, p.436.

The shortage of consumer goods in the territory may have caused discontent amongst elite Africans but the situation proved advantageous to some traders who made large profits out of the black market by forcing small retailers to purchase goods (and thus sell) at grossly inflated prices.<sup>212</sup> Such steep rises in prices meant that even if non-elite Africans could obtain ration vouchers, their financial resources would have been severely stretched by such purchases. One may therefore conclude that the development of African consumption of processed foods was set back a number of years as a result of the war.

World-wide demand for primary produce, stimulated by reconstruction in Europe and then the Korean war (1950-53), boosted the terms of trade as prices for coffee (from 89.2 cents per kg in 1950 to 120 cents in 1954) and cocoa rose.<sup>213</sup> As ETCs were dominant in exports, they were the principal beneficiaries and their profits showed it, SCOA's reaching an all time high in 1950 and CFAO's in 1952.<sup>214</sup>

The monopoly control of ETCs was largely down to "their long experience in French Black Africa, their strong financial position, and the agreements between themselves and with potential competitors."<sup>215</sup> To this may be added their overseas contacts and the fact that the administration, unlike in British territories, bought all capital goods through the companies. With the launching of the FIDES plan, the ETCs were once again in the right place at the right time and with the right contacts (and contracts). Other advantages included a "virtual monopoly" on sea transport between France and her colonies and favouritism in the allocation of foreign exchange resources (which also mitigated against non-French European concerns).<sup>216</sup> Well though things were going for the ETCs, others were not doing badly either. The Lebanese were

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<sup>212</sup> Anyang' Nyong'o, 'Agrarian', p.188.

<sup>213</sup> Hopkins, Economic History, pp.181, 185; Coquery-Vidrovitch, 'Impact', p.611; Zolberg, One Party, p.165.

<sup>214</sup> Coquery-Vidrovitch, 'Impact', pp.597-598.

<sup>215</sup> Thompson and Adloff, French, p.435.

<sup>216</sup> Ibid., p.436.

well placed as intermediaries in the produce collection business and the plantation owners also benefited from higher prices and increased demand as well as the abolition of forced labour.<sup>217</sup> For many though, these heady days were shortly to come to end.

In the years 1947 to 1952 CFAO and SCOA reached the peak of their success, after which their profits steadily declined.<sup>218</sup> The decline of the trading company factories has been fairly well documented in many parts of West Africa. Most sources deal with the region in general or else with French West Africa as a whole and there is little doubt that the number factories did decline in the region in the 1950s.<sup>219</sup> However, the decline in some areas of Ivory Coast was slower due to the rapid increase in export crop production:<sup>220</sup> CFAO actually increased the number of outlets between 1948 and 1954 from 44 to 47<sup>221</sup> although by the early 1960s the withdrawal was almost complete.<sup>222</sup>

The motives behind the withdrawal of up-country stations are still disputed. Bauer, referring to the Anglophone territories, said it occurred partly because of political pressure and partly because of falling turnover and narrowing profit margins.<sup>223</sup> Rising salaries for expatriate personnel and indigenous employees also contributed to declining profits. The companies blamed this principally on the *Loi Cadre* and increasing social benefits for workers.<sup>224</sup> Introduced in 1956, the *Loi Cadre* gave administrative

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<sup>217</sup> *Ibid.*, pp.430-431, 438-439; Berg, 'Choice', pp.392-393; Hopkins, Economic History, pp.218-219; Boone, 'Commerce', p.70.

<sup>218</sup> Coquery-Vidrovitch, 'Impact', pp.611-616.

<sup>219</sup> *Ibid.*, pp.595-621; Assidon, Captif, pp.60-74; Bollinger, Marketing, pp.43-57.

<sup>220</sup> Suret-Canale, 'Background', p.456.

<sup>221</sup> H.Bonin, CFAO: cent ans de compétition (Economica, Paris, 1987), p.307.

<sup>222</sup> SEDES, 'Korhogo'; BDPA, 'Odienné-Boundiali'; SEDES, 'Région du sud-est. Etude socio-économique' (Ministère du Plan, Abidjan, 1967); SEC-OBM, 'Région de Daloa-Gagnoa. Etude socio-économique' (Ministère du Plan, Abidjan, 1964); IDET-CEGOS, 'Région Odienné-Seguela' (Ministère du Plan, Abidjan, 1968).

<sup>223</sup> See also Coquery-Vidrovitch, 'Impact', pp.611-621; Zolberg, One Party, p.166.

<sup>224</sup> Coquery-Vidrovitch, 'Impact', p.616.

personnel the most generous salaries in French West Africa.<sup>225</sup> There was also a rash of politically agitated strikes by unions which had been set up since 1945.<sup>226</sup> These two factors would have effected salaries and employment conditions in the private sector. CFAO estimated that average salaries were 220% higher in 1959 than in 1952.<sup>227</sup> The apparent drift towards independence may have caused some trepidation in the boardrooms of the major companies who feared increasing restrictions on the activities of foreign concerns as well as rising social and economic aspirations of Africans. If properties were seized, as happened to CFAO in Guinea in 1959,<sup>228</sup> heavy losses could be incurred even with compensation. However, it would be wrong to assume that the companies were solely concerned about the general political climate. CFAO was already moving to diversify into industry by 1942, deciding that "*le repli de l'Afrique Noire sur elle-même favorise la transformation sur place de certains Produits*".<sup>229</sup>

Another important factor was the closure of up-country stations during the war years due to staff shortages. This further distanced the companies from suppliers of agricultural produce and allowed in an increasing number of Lebanese, African and even small European intermediaries.<sup>230</sup> As Boone explained, many Lebanese "had been recruited by the European companies during the inter-war period as sales agents and crop purchasers. . . . by the 1950s many Lebanese traders were well-established, independent commercial intermediaries."<sup>231</sup> With the closure of some up-country stations during the war, the recruitment of crop purchasers probably intensified. In other words, the increased competition from the Lebanese and others was partly due to commercial opportunities presented to them by ETCs.

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225 M.A.Cohen, Urban Policy and Political Conflict in Africa (University of Chicago Press, Chicago, 1974), p.58.

226 Person, 'French', pp.156-157.

227 Coquery-Vidrovitch, 'Impact', p.616.

228 Bonin, CFAO, pp.297-305, 335-342.

229 Ibid., p.317.

230 Thompson and Adloff, French, p.439; Bigo, 'Network', p.512.

231 Boone, 'Commerce', p.70.

The end of the two-way system of trade was thus very much in sight by the 1950s. The functions of up-country outlets increasingly began to change from the purchase of local produce and the retail of imported merchandise to the wholesaling (and retailing in the case of SCOA's Chaîne Avion) of imported merchandise.<sup>232</sup> Between 1954/55 and 1959/60, dealings in African produce declined from 23.5% of the share of SCOA's turnover to 15%<sup>233</sup> and by 1969/70 this figure was just 3%.<sup>234</sup>

As subsequent chapters will show, the companies began to concentrate on importing, specialised distribution and, in co-operation with metropolitan manufacturers, on industry. SCOA opened its first Chaîne Avion stores at the end of 1955. CFAO was also involved in chain stores by the early 1960s as well as supermarkets.<sup>235</sup> Interest in local manufacturing had been stimulated partly by the blockade of Vichy French West Africa during the war.<sup>236</sup> The first food industries were reconditioning industries where all of the materials required were imported.<sup>237</sup> However, there was no local production of any kind of canned meat, canned fish or even wheat flour in 1957.<sup>238</sup> This was in no small part due to opposition from metropolitan manufacturers worried at losing their market.<sup>239</sup> In summary, changing economic circumstances and new opportunities arising from government spending, as well as the increasing power of Lebanese traders, encouraged the big trading companies to diversify their interests. Africans, meanwhile, remained excluded from the import-export trade despite increasing political awareness and perhaps because of the greater attractions of export crop production following the abolition of forced labour.

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232 Bonnefonds, 'Traite', pp.399-400.

233 Coquery-Vidrovitch, 'Impact', p.617.

234 Assidon, Captif, p.95.

235 R.E.Grupp, 'Transposition en Afrique noire de méthodes commerciales modernes: l'entreprise succursaliste "Chaîne Avion" en Côte d'Ivoire'. In Laboratoire, Afrique, p.354 (footnote 1); Assidon, Captif, pp.69-72.

236 Suret-Canale, 'Background', p.457.

237 Interview: Mr. Fofana Coulibaly, Director of the Ecole de Commerce, Abidjan (December 4 1990); Gbagbo, 'Coloniales', p.483.

238 Jones and Merat, 'Exotic', p.51.

239 Suret-Canale, 'Background' p.458.

## 2.9 CONCLUSION

Many of the points raised in this chapter can be summarised by reversing the three point model developed by E.O.Akeredolu-Ale in his explanation of why the Ijebu Yoruba are disproportionately represented in trade in Nigeria.<sup>240</sup> He argued that the Ijebu achieved prominence because of economic necessity, cumulative advantages (sociocultural and operational) and most opportune location. One of the main themes in this chapter has been the lack of economic factors which might have forced indigenous Ivorians into trade. Whilst the Ijebu saw trade as their last chance of economic survival, most Ivorian ethnic groups had the land option (Dida, Baoule, Krou, Agni, Gouro and Bete) and/or had to some degree relied on mining (Abron, Agni and Kokumbo gold) or production (lagoon peoples and palm oil, Baoule cloth). Plantations in the colonial era, especially after the abolition of forced labour, were an attractive alternative to trade.

The second point concerned comparative advantages, of which there were two. The first, sociocultural, again did not apply to non-Dioula Ivorians for they were not "raised in a social context . . . where many people were already deeply involved in commerce"<sup>241</sup> as were many young Ijebus who consequently held the successful trader businessman in high esteem. Nor did the second, operational, apply to Ivorians though it is highly significant when discussing the Dioula who did have a trading network similar to the Ijebu. The final point raised by Akeredolu-Ale was location. Again, especially concerning the coastal Krou and Abron, it has been demonstrated that many Ivorian groups were, for differing reasons, disadvantageously located when it came to trade.

The coming of French rule saw a change in the location of commercial centres and an increasingly complex trade network. Previously small towns like Bouafle, Toumodi and Bouake began to grow rapidly whilst old trade centres such as Kong, Bouna and

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<sup>240</sup> E.O.Akeredolu-Ale, 'A Sociohistorical Study of the Development of Entrepreneurship among the Ijebu of Western Nigeria', *ASR*, 16, 3 (December 1973), pp.358-361.

<sup>241</sup> *Ibid.*, p.360.

Odienne declined in importance and wealth. The new towns were the locations of both trading companies and the administration, and were the centres where agricultural produce was gathered. The result of these changes was the dominance a north-south pattern of trade when previously it had been east-west. The problems faced by the Ivorian trader during the colonial years reinforced their difficulties, especially regarding cumulative advantages. Economic necessity, given the opportunities of the export economy, the need for a stable income to pay taxes and the stiff competition from Europeans and Lebanese alike, was simply not a realistic reason for entering trade, let alone a necessity, for all but a few.

Colonial Ivory Coast fits almost perfectly into the open economy model proposed by Hopkins and all of its five major characteristics are directly related to one or more of the outlet categories. First, all traders were intricately involved in primary production for export overseas and/or selling manufactured imports. Second, European trading companies dominated the import-export sector and African traders often found their activities restricted in the early years as, third, an external power controlled economic policy. Fourth, the imposition of the franc in place of local forms of currency was crucial to the taxation of traders and other workers alike which in turn was crucial if, fifth, a balanced budget was to be achieved with minimal colonial power fiscal input but it would be wrong to interpret the imposition of the franc as having wholly negative effects for Africans.

The development of ETCs was closely linked to the development of the colonial economy as a whole. The companies were the main beneficiaries of improved transport and communications and their fortunes mirrored those of the export economy. Economic downturns enabled the larger companies to gain at the expense of smaller operators as they had the necessary capital to weather the financial storms. The ETCs' process of vertical integration combined with an extensive range of goods made them formidable competitors and ensured both a regular supply of customers and

goods. At the same time, the Lebanese also fared better when times were hard due to their greater efficiency and flexibility in the face of adverse economic conditions. Turning again to Akeredolu-Ale's model, geographical location was hardly applicable to the Lebanese but economic necessity and cumulative advantages were important. In the 1950s and early 1960s ETCs were faced with a rapidly changing political and commercial environment and their adaption to it through diversification of their interests maintained their position as major players in Ivorian trade.

This and subsequent chapters will show that certain trends discouraging Ivorians from trade and providing favourable conditions for foreigners were evident from the precolonial period and continued into the colonial and postcolonial eras. Alternative means of income, external political and/or economic control and organised non-indigenous trading groups all mitigated against Ivorian interests in trade. From Dioula traders to European trading companies to Lebanese entrepreneurs, foreigners have played prominent roles in internal distribution since the sixteenth century. The fiercest competition between commercial groups almost has always involved one foreign interest versus another. Rarely have Ivorians entered into the picture.



**CHAPTER 3**  
**NON-WESTERN STYLE ENTERPRISES AND THE DOMINANCE**  
**OF FOREIGN TRADERS**

This chapter seeks to explain the predominance of Non-western Style Enterprise (NSE) stores and the dominance of foreign Africans and Lebanese in internal distribution. The majority of outlets in this category are owned by individuals or by families, have few financial resources and rely on local technology and capital, and on informally acquired skills. Few employ regular salaried personnel and for most entry into the sector has few restrictions. They include Ivorian and other African small retailers, semi-wholesalers and wholesalers and Lebanese wholesalers, semi-wholesalers and, until the late 1960s, small retailers. Many grocery stores were owned by Lebanese and Ivorians but were run according to western techniques and are thus discussed in the following chapter with other WSE traders.

For analysis, it is useful to divide NSE traders into four categories: Ivorians, Lebanese, Mauritians and Non-Ivorian Black Africans (hereafter NIBAs). The latter group, by far the largest, includes traders from Mali, Benin, Togo, Burkina Faso, Senegal, Guinea and other West African countries. It was between these groups that the questionnaires discussed in the Introduction were equally divided. Given the problems previously mentioned concerning proprietors and managers and the unavoidable inclusion of some WSE grocery stores in the Lebanese sample, the data are used to support and complement other sources rather than being the sole basis for the analysis. Given that there are no published sources on Mauritanian traders in Ivory Coast, this supplementary information is at times invaluable. All percentages in the tables are to the nearest 0.5%.

The main body of the chapter is organised in five sections. The first looks at the evolution in the numbers of stores over the period 1956-90. The second examines the origins and background of immigrant traders in Ivory Coast. This is followed by a brief

section on the physical appearance of these NSE stores and the kinds of processed foods they stocked. The fourth section examines the responsibilities of traders towards family and community and the importance of kinsmen in the starting up and sustaining of a private enterprise. The final section assesses relations between the foreign trading communities and the Ivorian state as well as the European trading community and individual Ivorians.

### 3.1 DEVELOPMENTS IN STORE NUMBERS

The temporary nature of many stores, their sheer numbers, and a lack of consistent criteria for enumeration over the years have made accurate assessments of the growth of the NSE sector a thankless but not impossible task. The earliest figures available are for commercial licences held by Lebanese-Syrian nationals which increased from 515 in 1948 to 666 in 1951 and 1,062 in 1954<sup>1</sup> i.e. the number doubled in the space of just six years. However, no more than a handful were likely to have been stores involved in the processed food trade as in 1961-62 of 2,545 'independent' stores (i.e. not company or co-operative stores)<sup>2</sup> 22.6%<sup>3</sup> or 575 were Lebanese. Further, a 1962-63 survey of the Bouake region found that ten out of 68 outlets dealt only in textiles<sup>4</sup> whilst others would have been involved in produce buying to sell to the European trading companies.<sup>5</sup> Winder stated that the Lebanese in West African cities typically specialised in cloth.<sup>6</sup>

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<sup>1</sup> AOF, Inventaire économique de la Côte d'Ivoire 1947-56 (Ministère du Plan, Clichy, 1958).

<sup>2</sup> IDET-CEGOS, 'La distribution en Côte d'Ivoire' (Ministère du Plan, Abidjan, 1963), p.47.

<sup>3</sup> L.Fabiani, 'Circuits de distribution en Côte d'Ivoire' (Mémoire d'entrée, Centre des Hautes Etudes sur l'Afrique et l'Asie Modernes, Paris, 1967).

<sup>4</sup> BCCEER, 'Etude régionale de Bouake' (Ministère du Plan, Abidjan, 1963).

<sup>5</sup> D.Bigo, 'The Lebanese Community in the Ivory Coast: a Non-native Network at the Heart of Power?'. In A.Hourani and N.Shehadi (eds.), The Lebanese in the World: a Century of Emigration (Centre for Lebanese Studies, 1992), pp.512-514.

<sup>6</sup> R.B.Winder, 'The Lebanese in West Africa', Comparative Studies in Society and History, 4, 3 (1962), p.254.

Given the at times inaccurate or hazy definitions of what constitutes a store in some of the sources (on which more later), the numerical evolution of African stores is not always easy to trace. However, there was probably a growth in numbers throughout the 1950s given that the economy in general was expanding. According to the number of commercial licenses issued, there were 5,590 retail outlets in 1953. This figure excludes bakers, jewelers, produce buyers, hawkers, butchers and import-export companies. This leaves us with general merchandise stores, textile outlets, hardware stores and other non-food specialist retailers.<sup>7</sup> It has already been shown that the Lebanese held 1,062 commercial licenses in 1954 so this leaves around 4,600. However, it is impossible deduce anything further from the figures without the use of much speculation. The biggest problem comes in deducing what percentage of these were general merchandise stores. The answer is, probably, most of them: but it is impossible to make any further deductions because neither the number of European owned stores is known nor whether all these licenses were held for stores (unlikely) nor whether all African stores had a licence (most unlikely).

The figures for 1961-62 are also inadequate because they appear to define a store too strictly. The statistic given is 2,545 independent traders, these being defined as stores averaging 20 m<sup>2</sup> and owned by the Lebanese or by Africans. Of these 27.1% were Ivorian and 46.4% were owned by non-Ivorian Africans,<sup>8</sup> which works out at 1,870 African stores. If it is assumed, as with the Lebanese, that 70% were general merchandise or food traders, the final figure for African stores in 1961-62 was around 1,300. However, the real figure was probably at least double that for many stores were no more than a few square metres in surface area and the average of 20 m<sup>2</sup> given in the source seems to imply that stores beneath a certain size were excluded.

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<sup>7</sup> AOF, *Inventaire*, p.131.

<sup>8</sup> IDET-CEGOS, 'Distribution', pp.46-48.

By around 1969 there were 1,087 Lebanese and 13,488 African stores<sup>9</sup> of which probably about 575 and 9,500 respectively dealt in processed foods. These figures may be deduced by the fact that most, perhaps 70%, of the Lebanese in the interior had general stores<sup>10</sup> whilst most of those in Abidjan (60%) were specialist textile stores.<sup>11</sup> From these figures one can thus tentatively conclude that the number of Lebanese processed food stores increased by between 175 and 275 in the space of seven or eight years. For African stores one can only assume once again that 70% were general merchandise or food stores. Again, the precise definition of stores is unclear, as is the precise date for these statistics.

By 1976 the Lebanese figure appears to have increased only marginally to around 600 although this estimate is rather laboriously arrived at. According to a 1976 census of stores in urban areas with a population of at least 10,000 (see Table 2 below), there were 1,001 stores owned by middle easterners (57% were in Abidjan), all but a handful of whom were Lebanese. Whilst it is possible to calculate the likely number of stores dealing in processed foods for all traders, it is not possible to do this by national group.<sup>12</sup> Therefore, for the interior, the same figure as used before, 70%, will have to suffice. For Abidjan, the percentage used, 40%, is based on Diambra-Hauhouot's 1972 survey.<sup>13</sup> This gives a figure of 515 Lebanese processed food stores. To this must be added Lebanese traders in smaller urban areas. Judging by the early 1980s, towns of between four and ten thousand usually had two to three Lebanese general merchandise

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<sup>9</sup> CEGOS-ECONOMIE, 'Survey of Investment Opportunities in the Republic Ivory Coast' (Report realised for the Gillette Group, Puteaux, 1971), p.24.

<sup>10</sup> This was the case, Abidjan excepted, in the early 1960s. In the mid 1970s, the general impression gained from the sources indicates that, again Abidjan excepted, this was also true. It seems unlikely therefore that the same should not also be true for 1969. See BCCEER, 'Bouake'; SEC-OBM, 'Région de Daloa-Gagnoa. Etude socio-économique' (Ministère du Plan, Abidjan, n.d. circa 1964); BDPA, 'Etude général de la région de Man', (Ministère du Plan, Abidjan, 1976).

<sup>11</sup> A.Diambra-Hauhouot, 'Le commerce de détail dans l'agglomération d'Abidjan' (IGT, Université d'Abidjan, janvier 1973), p.14.

<sup>12</sup> J.Chateau, 'Recensement général des activités en milieu urbain 1976' (Ministère du Plan, Abidjan, 1977).

<sup>13</sup> Diambra-Hauhouot, 'Agglomération', p.14.

stores which is roughly the same as many much larger towns, probably because they faced no competition from European outlets.<sup>14</sup> Further, the large majority of these outlets were long established i.e. at least five years.<sup>15</sup> In 1975 there were 23 towns with a population of between four and ten thousand<sup>16</sup> which, with an average of say 2.5 Lebanese stores per town, gives an extra 58 outlets. In addition, there were probably a number of Lebanese in smaller towns, especially in the east because of the border trade, and they may have numbered as many as 30. The total number of Lebanese processed food stores in 1976 is thus estimated to be about 600, a marginal increase since 1969.

TABLE 2: NUMBERS AND PERCENTAGE OF ALL STORE TYPES BY ETHNIC/NATIONAL GROUPS IN TOWNS WITH A POPULATION OF 10,000 AND OVER, 1976.

| GROUP          | ABIDJAN | BOUAKE | OTHER | ALL TOWNS | % OF TOTAL |
|----------------|---------|--------|-------|-----------|------------|
| Senegalese     | 175     | 25     | 233   | 433       | 3.6        |
| Guinean        | 201     | 93     | 430   | 724       | 6.1        |
| Burkinabes     | 662     | 96     | 485   | 1,243     | 10.5       |
| Maliens        | 753     | 303    | 1,229 | 2,285     | 19.3       |
| Nigeriens      | 786     | 83     | 325   | 1,194     | 10.1       |
| Other N.I.B.A. | 355     | 19     | 254   | 628       | 5.3        |
| Mauritanians   | 561     | 21     | 420   | 1,002     | 8.4        |
| IVO - Akan     | 449     | 109    | 473   | 1,031     | 8.7        |
| IVO - Malinke  | 185     | 65     | 484   | 734       | 6.2        |
| IVO - Senoufo  | 124     | 26     | 252   | 402       | 3.4        |
| IVO - other    | 245     | 42     | 327   | 614       | 5.2        |
| Levantine      | 562     | 44     | 380   | 987       | 8.3        |
| others         | 385     | 57     | 156   | 598       | 5.0        |
| TOTAL          | 5,442   | 974    | 5,448 | 11,864    | 100        |

NIBA = Non-Ivorian Black Africans. IVO = Ivorians

Source: D.Bollinger, Le marketing en Afrique, tome 1: La Cote d'Ivoire, (CEDA, Abidjan, 1977), pp.126-127.

<sup>14</sup> DSA: internal report, L.Bosteen, 'Survey of Distribution Outlets and Ethnic/National Groups - Bush Sector of Abidjan' (1985); Personal experience: observation. All further references to personal experience are for all of the periods 1983-85 and 1986 unless otherwise stated.

<sup>15</sup> Personal Experience: discussions with traders and salesmen; DSA: credit client sheets (1980-87).

<sup>16</sup> Chateau, 'Recensement'; RCI, Population de la Cote d'Ivoire (Ministère de l'Economie et des Finances, Abidjan, 1984), pp.37-38.

The split between food sellers and non-food sellers in 1976 was not the same for all of the ethnic or national groups. In 1990, many Nigerians dealt in cosmetics only<sup>17</sup> and the same may have been true in 1976. Also, a disproportionate number of Ivorians sold only textiles<sup>18</sup> whilst the Senegalese were known for their jewelry stores as well as general trade.<sup>19</sup> On the other hand, virtually all Mauritians have long operated virtually only general merchandise stores,<sup>20</sup> as in Senegal.<sup>21</sup> Of the 6,612 of the 11,864 total that did sell food, 6,000 were African stores.<sup>22</sup> To this figure must be added stores in urban areas of less than 10,000 and in rural areas. On the basis of at least one store per 300 people,<sup>23</sup> this produces around 15,000 stores of which, as above, half sold processed foods. This gives a grand total of around 13,500 African general merchandise and processed food stores in Ivory Coast.

Calculating the number of processed food stores after 1976 is even more problematic, especially regarding the Lebanese, as data for 1983 (Abidjan), 1984 (Bouake)<sup>24</sup> and 1985<sup>25</sup> conflict sharply with that for 1989-90, shown in Table 2.<sup>26</sup> The earlier surveys dealt specifically with food stores but did not cover the entire

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<sup>17</sup> Fieldwork: observation. This was especially true in Adjame where most of them were located. All further references to fieldwork are for all the period July-December 1990 unless otherwise indicated.

<sup>18</sup> Chateau, 'Recensement'.

<sup>19</sup> S.F.Lo, 'Les "Gorguis" de Cote d'Ivoire', Ivoire Dimanche, 950 (April 23 1989).

<sup>20</sup> Personal experience: discussions with salesmen; Fieldwork: observation.

<sup>21</sup> C.J.Santoir, 'L'émigration Maure: une vocation commerciale affirmée', Cahiers ORSTOM, sér. sci. hum, 12, 2 (1975), pp.137-159.

<sup>22</sup> D.Bollinger, Le marketing en Afrique, tome 1: La Cote d'Ivoire (CEDA, Abidjan, 1977), pp.123-126; Chateau, 'Recensement'.

<sup>23</sup> This rather speculative estimate is based on the 1975 rural population in RCI, Population and figures in SEDES, 'Région du sud-est: étude socio-économique' (Ministère du Plan, Abidjan, 1967); SEC-OBM, 'Daloa-Gagnoa'; BCCEER, 'Bouake'. The figure of three hundred is probably an underestimate.

<sup>24</sup> DSA: internal report, J.Ayrebi, 'Survey of Distribution Outlets, Abidjan' (1983); internal report, J.Ayrebi, 'Survey of Distribution Outlets, Bouake' (1984).

<sup>25</sup> DSA: internal report, L.Bosteen, 'Survey of Distribution Outlets and Ethnic/National Groups, Abidjan Town' (1985); internal report, L.Bosteen, 'Bush Sector'.

<sup>26</sup> Fieldwork: unpublished survey by the PNCI (1989-90).

country whilst the latter survey covered the entire country but appears to include non-food outlets. The number of Lebanese food stores in Abidjan in 1985 was just 120, which seems extremely low given the data from 1976. However, the 1985 figure of 1,545 food stores in all in Abidjan is similar to the number found in 1983. Whilst both surveys were done for the same company, different people were involved and the same regions of the capital (including one of the largest, Adjame) were double checked by different people in the 1985 survey. Therefore it seems difficult to question the figure of 120.

TABLE 3: NUMBER AND PERCENTAGE OF STORES OWNED BY THE PRINCIPAL NATIONAL GROUPS, 1989-90.

| NATIONALITY          | NUMBER | % OF TOTAL |
|----------------------|--------|------------|
| Ivorians             | 2,833  | 21.67      |
| Guineans             | 1,217  | 9.30       |
| Senegalese           | 830    | 6.34       |
| Burkinabes           | 1,224  | 9.96       |
| Maliens              | 1,198  | 9.17       |
| Nigerians            | 675    | 5.16       |
| other Black Africans | 348    | 2.06       |
| Mauritanians         | 2,557  | 19.56      |
| Lebanese             | 2,193  | 16.78      |
| TOTAL                | 13,075 | 100.00     |

Source: Fieldwork: unpublished PNCI survey (1989-90).

The 1989-90 survey found 2,193 Lebanese general merchandise stores in all but there is no indication as to the split between the interior and Abidjan. However, it is difficult to imagine that less than 30% of Lebanese enterprises were in Abidjan and the figure is more likely to be the 40% or 875 stores given the 1976 survey and data from the DSA surveys. This is a huge increase for Abidjan in four years, especially at the time of a recession. The most likely explanation is that the 2,193 figure includes all kinds of stores, i.e. the words 'general merchandise' has been misused. Thus the large numbers of Lebanese import-export depots, textile, electrical and other hardware goods stores must have been included.

For the interior, the 1985 data cover a limited number of towns but the difference is probably smaller. A total of 156 Lebanese processed food stores were found in 38 (including the 30 largest) towns in the southern, western and eastern areas of the country. Probably these constituted around half of all Lebanese interior food stores at the time<sup>27</sup> giving 300 or so, plus the 120 in Abidjan. Thus the final sums look like 420 in 1985 versus 2,193 in 1989-90. Even taking the aforementioned problems into account, this is too large a discrepancy and both figures must therefore be regarded as highly suspect.

The data for African stores are slightly less problematic though the only real comparisons that can be made between 1985 and 1989-90 are for Mauritians. The total for 1989-90 was 2,557. For 1985, there were 588 stores in Abidjan and 340 in the interior areas surveyed, giving a total of 928. Given that the vast majority of Mauritians were located within the area surveyed, Bouake excepted,<sup>28</sup> the overall total for 1985 was probably no more than 1,300 or roughly half that of 1989-90. This still substantial difference cannot be explained away by faulty definition of store types for virtually all Mauritians sell processed foods.<sup>29</sup> However, the outlet surveys of selected towns and districts<sup>30</sup> indicate that both the number of Mauritians and their proportion of all traders increased substantially between 1985 and 1990. In Attiecoube for example, their numbers increased from 20 to 46, in Marcory from 51 to 79 and in Aboisso from eight to 20. It therefore seems fair to conclude that both the 1985 and 1989-90 Mauritanian figures are reasonably accurate.

It is impossible to determine with the same accuracy the number of processed food stores for other African traders in 1989-90 if 'general merchandise' includes non-food stores. Many non-

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<sup>27</sup> Personal experience: observation: discussions with salesmen and Lebanese traders.

<sup>28</sup> Ibid; DSA: internal reports, L.Bosteen, 'Abidjan Town' and 'Bush Sector'; Fieldwork: regional distribution survey.

<sup>29</sup> Personal experience: observation; Fieldwork: observation: discussions with salesmen; Interview: Mr. Jacques La Rue, Chef de Mission PNCI (Abidjan, December 10 1990).

<sup>30</sup> Fieldwork: regional distribution survey.



Mauritanian African traders deal in textiles, cosmetics and hardware. However, Table 2, even allowing for 70% of African outlets as selling processed food, indicates that store numbers were less or at best equal to the 1969 figure.

Whilst precise (or at times even vaguely accurate) figures are impossible to establish, there is less doubt about the general trend in the number of stores in the country as a whole. One experienced salesman estimates that the number of stores increased fairly slowly in the 1970s (after rapid increases in the previous decade) and that since around 1978 the numbers have steadily decreased overall.<sup>31</sup> This makes sense if two other pieces of circumstantial evidence are considered. First, the slower than before increases during the 1970s could well have been due to WSE store competition during these years. Second, even though most of these WSE stores disappeared during the early 1980s, the economic climate, and particularly average income per head, declined to the extent that all stores were affected, even though there were fewer of them. It is also probably no coincidence that the most rapid growth in the increase in store numbers, the 1960s, occurred during the period of the most rapid growth in income per head.

### 3.2 BACKGROUND OF IMMIGRANT TRADERS

Evidence presented in the previous chapter and the two tables above indicates clearly that foreign traders have long dominated internal trade in Ivory Coast. This section looks at traders' countries of origin, years spent in Ivory Coast, motives for migration, and previous occupations.

Malians, Burkinabes, Senegalese, Guineans and Lebanese migrated to Ivory Coast almost throughout the period 1956-1990 but the countries of origin of many immigrant traders has changed considerably. There is no indication as to when Dahomeans and

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<sup>31</sup> Interview: Mr. Bernadin Doh Gilles, Salesman at Blohorn and DANAFCO (Abidjan, 2nd. interview, October 2 1990).

Togolese first arrived but it was probably at least since before World War Two.<sup>32</sup> By the early 1960s most had departed. The Anongo or Nago,<sup>33</sup> collective names used by Ivorians for mainly Yoruba traders from Nigeria, first migrated in significant numbers from around 1955 and remained important until the early 1970s.<sup>34</sup> Figures for around 1962 (certainly no later) show that foreign Africans owned 63% of African stores.<sup>35</sup> Around the late 1960s the first Mauritanian stores appeared<sup>36</sup> and since at least the early 1980s they were the numerically dominant store owners in Ivory Coast. Table 4 confirms that Mauritanians were, on average, the most recent arrivals in Ivory Coast. Figures presented in Table 3 showed that the NIBA category constituted around 42% of all stores (including non-food outlets) in 1989-90 with Mauritanians at around 20% and Lebanese at almost 17%.<sup>37</sup>

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32 M.Cohen, Urban Policy and Political Conflict in Africa (University of Chicago Press, Chicago, 1974), p.72. Cohen stated that the Togolese and Dahomeans were brought over by the colonial administration to fill white-collar jobs but gives no date as to when this began.

33 The term 'Nago' comes from 'Anago', a Yoruba sub-group. They are described by Afolabi as having 'no defined [geographical] limits'. 'Anago' has also been used by Dahomeans and 'Nago' or 'Nagot' by the Fon and then French administrators to describe the Yoruba in Dahomey and Togo (but apparently not in Ivory Coast). 'Anongo' was possibly derived from a combination of 'Anago' and 'Zongo' (meaning 'rest station' in Hausa), the latter being the northern Togolese and Ghanaian word for urban foreigner quarters. 'Anongo' possibly was used by Togolese Yoruba in Ivory Coast to distinguish themselves from the 'foreign' Nigerian Yoruba. See S.Decalo, Historical Dictionary of Togo (Scarecrow Press, Metuchen, 1987), pp.28, 212; R.Smith, Kingdoms of the Yoruba 3rd. ed. (James Currey, 1988), pp.7-9, p55; G.J.Afolabi Ojo, Yoruba Culture (University of London Press, 1966), p.17.

34 Diambra-Hauhouot, 'Agglomeration', pp.25-29.

35 IDET-CEGOS, 'Distribution'.

36 ORSTOM and IGT, Atlas de Cote d'Ivoire (Ministère du Plan, Abidjan, 1975), section D3a; Diambra-Hauhouot, 'Agglomeration', pp.27-29. Whilst both of these sources are for Abidjan only, later sections will show that the first Mauritanians came to the capital. Further, they are not mentioned in any other source covering the 1960s in the interior.

37 Fieldwork: unpublished PNCI store survey (1989-90).

TABLE 4: AVERAGE NUMBER OF YEARS TRADERS HAVE LIVED IN IVORY COAST, 1990.

| DESIGNATION                | ABJ<br>NIBA | INT<br>NIBA | ABJ<br>MAU | INT<br>MAU | ABJ<br>LEB | INT<br>LEB |
|----------------------------|-------------|-------------|------------|------------|------------|------------|
| Proprietors: years in I.C. | 11.4        | 16.0        | 9.9        | 9.7        | 14.9       | 18.7       |
| Managers: years in I.C.    | 7.5         | 12.7        | 6.9        | 5.9        | 7.7        | 4.5        |
| SAMPLE SIZE: Proprietors   | 18          | 23          | 10         | 17         | 18         | 32         |
| : Managers                 | 12          | 17          | 20         | 23         | 12         | 8          |

Source: Fieldwork: questionnaires (1990).

Table 4 also reveals that though there were marked differences in years resident in Ivory Coast for proprietors, these differences were less for managers. This probably indicates that the NIBA and Lebanese communities, although long established, continued to expand in the late 1980s. Less easy to explain is why Abidjan Lebanese and NIBA proprietors had on average been resident for a shorter period than their counterparts in the interior whilst for Mauritians there was little difference. The most likely explanation is probably that competition in Abidjan was more vigorous, leading to a faster 'turnover' of traders and that this had yet to show amongst Mauritians either because of their stronger commercial organisation (explored below) or because, as previously observed, the first immigrants settled in Abidjan or because of a combination of both.

The vast majority of traders surveyed came to Ivory Coast directly from their own country. However, this tendency was less evident among the Lebanese with some born in Ivory Coast and others migrating from third countries to join relatives. Third countries were as diverse as Brazil, Spain, Saudi Arabia, Canada and Liberia. Most traders of all groups who did not come from their country of origin migrated from Senegal. Political and racial disturbances (Mauritians) and a declining economy would have been strong motivating factors for leaving Senegal in favour of Ivory Coast where the linguistic setting was similar. The next few paragraphs deal with motives for migrations in and out of Ivory Coast in more detail.

Table 5 below shows reasons why traders left their previous country. Many traders were likely to have had several motives, all but a few of which would be related to 'the bottom line', i.e. survival. Subsequent paragraphs show that the motives of earlier traders were little different. Many Lebanese came to join their family. Most of these came as children with their parents, which helps explain the high average number of years lived in Ivory Coast shown in Table 4. For NIBAs, all the those citing political reasons were Guineans whilst the Mauritians all came from Senegal.

TABLE 5: TRADERS' REASONS FOR LEAVING PREVIOUS COUNTRY, PERCENTAGES, 1990.

| REASON              | ABJ  | INT  | ABJ  | INT  | ABJ  | INT  |
|---------------------|------|------|------|------|------|------|
|                     | NIBA | NIBA | MAU  | MAU  | LEB  | LEB  |
| Financial / to work | 50.0 | 55.0 | 73.5 | 80.0 | 13.5 | 20.0 |
| Political / war     | 10.0 | 5.0  | 6.5  | 2.5  | 40.0 | 35.0 |
| Join family         | 6.5  | 15.0 | 10.0 | 5.0  | 36.5 | 17.5 |
| Personal / no reply | 0.0  | 2.5  | 0.0  | 0.0  | 0.0  | 15.0 |
| Other               | 33.5 | 12.5 | 10.0 | 12.5 | 3.5  | 5.0  |
| Not Applicable      | 0.0  | 10.0 | 0.0  | 0.0  | 6.5  | 7.5  |
| SAMPLE SIZE         | 30   | 40   | 30   | 40   | 30   | 40   |

Not Applicable = Interviewees born in Ivory Coast.  
Source: Fielwork: questionnaires (1990).

Much has already been said on the Lebanese, their historical involvement in commerce and the reasons why they migrated in the first half of the twentieth century. During this period most Lebanese in Ivory Coast were probably Shi'ite Muslims though Binet claims that Maronite Christians were the more numerous.<sup>38</sup> By 1960 in the Francophone territories 66% were Muslim and 34% Christian<sup>39</sup> and Winder also states that most were Shi'ites.<sup>40</sup> Data for 1990 revealed that 31 out of 40 Lebanese questioned in the interior and 26 out of 30 in Abidjan were Muslim. For those who arrived in or before 1976, seven out of 16 in the interior and 10

<sup>38</sup> Bigo, 'Network', p.511; J.Binet, 'Les libanais en Afrique francophone', *Kroniek van Afrika*, 6, 3 (1975), p.259.

<sup>39</sup> Winder, 'Lebanese', p.305.

<sup>40</sup> Winder, 'Lebanese', p.305.

out of 11 in Abidjan were Muslim. What is virtually indisputable is that, by 1990, the majority were Muslims. Since the 1950s, the political situation in Lebanon has become increasingly unstable with the economy descending into greater chaos, especially in southern Lebanon where Shi'ites are predominant. This seems the most likely explanation for the influx of Lebanese Shi'ites into Ivory Coast since the 1970s if not earlier.<sup>41</sup>

Dahomeans and Togolese in Ivory Coast worked primarily in white collar jobs, including trading companies. Some were also street traders, possibly relatives of white collar workers or migrants who failed to find such employment. Whilst their motives for coming may be obscure, their reasons for departing were not. In October 1958, attacks on foreign Africans in Abidjan, mainly Togolese and Dahomeans<sup>42</sup> but also Yorubas and others,<sup>43</sup> led to more than 25,000 leaving the country over the next two months. Whilst Ivorians' anger was directed mainly at foreigners in white collar jobs traders were also affected and some had their property destroyed.<sup>44</sup>

Among those attracted by increasing commercial opportunities in 1950s Ivory Coast were the Anongo.<sup>45</sup> Anongo traders had possibly reached their peak by 1968 when they were numerically the largest store trading group in the country.<sup>46</sup> The likely reasons for this were improving prospects back home with the oil boom<sup>47</sup> and the re-emergence of racial tension in Ivory Coast in that year. This followed the death of a young Baoule at the hands of an Anongo in Abidjan's Treichville district.<sup>48</sup> Fighting broke out and

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<sup>41</sup> Bigo, 'Network', p.515; D. Gilmour, Lebanon: The Fractured Country, (Martin Robertson, Oxford, 1983), pp.10-11.

<sup>42</sup> A.R.Zolberg, One Party Government in the Ivory Coast (Princeton University Press, Princeton, revised edition 1969), p.245.

<sup>43</sup> E.Skinner, 'Strangers in West African Societies', Africa, 33, 4 (1963), p.314.

<sup>44</sup> Zolberg, One Party, p.245.

<sup>45</sup> Diambra-Hauhouot, 'Agglomeration', p.27.

<sup>46</sup> Interview: Doh Gilles (2nd.): La Rue; ORSTOM and IGT, Atlas, section D3a; Diambra-Hauhouot, 'Agglomeration', p.29.

<sup>47</sup> O.Oculi 'Green Capitalism in Nigeria'. In P.Lubeck (ed.), The African Bourgeoisie (Lynne Rienner, Boulder, 1987), p.173.

<sup>48</sup> Interview: Doh Gilles (2nd.).

many Anongo outlets were pillaged or destroyed, first in Abidjan and then, as word spread of the spark which had lit the fuse, in the interior.<sup>49</sup>

The violence of 1968 cannot be explained entirely by this one incident. Resentment towards the Anongo had been evident for some time because of their success and consequent wealth. As this wealth began to show in the form of luxurious cars etc (in marked contrast to the extreme modesty of their commercial establishments), poorer urban Ivorians became resentful.<sup>50</sup> These circumstances would have done nothing to encourage other Anongo to migrate to Ivory Coast and probably caused a few to leave. Perhaps more important though were increasing prosperity in Nigeria through the oil boom and the Nigerian Enterprises Promotion Decree in 1972 which might have persuaded Nigerians that prospects were now more favourable back home.<sup>51</sup>

At the time of the 1975 census, Burkinabes (mostly Mossi) and Malians (mostly Dioula) were the two largest foreign groups in Ivory Coast and apparently had been for some time.<sup>52</sup> Whilst many Malians were traders from the 1950s onwards, few Mossi were at first.<sup>53</sup> The increases in the numbers of Mossi and Malians may well have had something to do with the large numbers of these peoples migrating to work on Ivorian plantations and, perhaps failing to find such work, entering into trade rather than returning home empty handed. Whilst plantation work paid very little and was regarded by Ivorians at least as an undesirable

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<sup>49</sup> Interview: La Rue: Doh Gilles (2nd.); Diambra-Hauhout, 'Agglomeration', p.27.

<sup>50</sup> Diambra-Hauhout, 'Agglomeration', p.28.

<sup>51</sup> P.Kennedy, African Capitalism (CUP, Cambridge, 1988), p.145; T.Biersteker, 'Indigenization and the Nigerian Bourgeoisie: Dependent Development in an African Context'. In Lubeck (ed.), Bourgeoisie, pp.259-261.

<sup>52</sup> RCI, Population.

<sup>53</sup> Interview: Doh Gilles (2nd.); Mr. Seydou Drabo, Storekeeper and Nightwatchman at DANAFCO (Abidjan, July 24 1990): La Rue; Diambra-Hauhout, 'Agglomeration', p.29; ORSTOM and IGT, Atlas, section D3a.

occupation,<sup>54</sup> many migrants would have seen it as a more secure source of income than trading.

Whilst Malians, Burkinabes and even Ivorian Dioulas in the south were commonly victims of racial attacks in the 1950s,<sup>55</sup> it appears that few left either then, like the Togolese, or later, like the Anongo. Their motives for staying put were probably financial for work opportunities back home were almost certainly worse than they were for Nigerians and Togolese. On the motives of Guineans and Senegalese, the two other principal foreign trading groups present since at least the 1960s, there is little information. Like other foreigners, many were undoubtedly attracted by the prosperous economic climate compared to their own countries. Additionally, a small number of Guineans interviewed for the questionnaire survey gave political repression as a reason for migrating.

Migration of Mauritians towards the Senegal river valley was common during much of the colonial period and since. But they rarely travelled further afield on the African continent until around the mid 1970s, when Ivory Coast became the third most common destination after Senegal and the Gambia.<sup>56</sup> A combination of economic and climatic factors have been largely responsible for this steady exodus and by 1976 an estimated 110,000 Mauritians (7.8% of the population) were living abroad.<sup>57</sup> Climatic pressure became particularly important from the 1970s as severe droughts hit the nomadic population. This

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<sup>54</sup> B.Lewis, 'The Dioula in the Ivory Coast'. In C.T.Hodge (ed.), Papers on the Manding (Indiana University, Bloomington, 1971), p.289; Zolberg, One Party, pp.41-42; S.Amin, Le développement du capitalisme en Cote d'Ivoire (Minuit, Paris, 1967), pp.32-33.

<sup>55</sup> Skinner, 'Starngers', p.315; Zolberg, One Party, pp.202-203.

<sup>56</sup> Santoir, 'Maure', pp.137-149; Interview: El Jilani Ould Boubakar, Mauritanian wholesaler at Koumassi since 1970 (Abidjan, December 8 1990); Mr. Ould Mohammed, Mauritanian retailer at Attiecoubé (Abidjan, July 1990). This retailer was a personal friend of Mr. Raymond Guei, a student at the Université Nationale in Abidjan. Given the reluctance of most Mauritians to be interviewed, R.Guei offered to interview the trader on my behalf in the hope that he would be able to obtain more information without the presence of a stranger.

<sup>57</sup> Santoir, 'Maure', pp.137-149; J. Conde, P.S.Diagne, N.G.Ouaidou, K.Boye and A.Kader, South-North International Migration, (OECD, Paris, 1986), p.97.

coincided with the heaviest migrations towards Ivory Coast, although the first Mauritians arrived around the mid 1960s.<sup>58</sup> Since then their numbers appear to have increased virtually every year, even well into the 1980s.<sup>59</sup> The first traders settled in the southern towns and most have followed their relatives there in subsequent years, a pattern similar to that of migrants to Senegal.<sup>60</sup>

On the subject of traders' occupations prior to their arrival in Ivory Coast, there are few sources other than the questionnaire survey results shown in Table 6 below.

TABLE 6: OCCUPATION PRIOR TO ARRIVAL IN IVORY COAST, PERCENTAGES, 1990.

| OCCUPATION       | ABJ  | INT  | ABJ  | INT  | ABJ  | INT  |
|------------------|------|------|------|------|------|------|
|                  | NIBA | NIBA | MAU  | MAU  | LEB  | LEB  |
| Trade            | 46.5 | 35.0 | 63.5 | 62.5 | 20.0 | 30.0 |
| Student / school | 6.5  | 17.5 | 13.5 | 2.5  | 63.5 | 40.0 |
| Agriculture      | 13.5 | 22.5 | 13.5 | 22.5 | 0.0  | 0.0  |
| Other            | 33.5 | 15.0 | 10.0 | 12.5 | 10.0 | 17.5 |
| Not Applicable   | 0.0  | 10.0 | 0.0  | 0.0  | 6.5  | 7.5  |
| No response      | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 5.0  |
| SAMPLE SIZE      | 30   | 40   | 30   | 40   | 30   | 40   |

Not Applicable = Interviewees born in Ivory Coast.  
Source: Fieldwork: questionnaires (1990).

Mauritians were the most likely to have been in trade prior to their arrival in Ivory Coast and this was the response given by all those who left Senegal, again consistent with other sources. Agriculture was also important for non-Lebanese migrants with many stating drought at home (Mauritians) and failure to find work on plantations (NIBAs) as reasons why they ended up in trade. It seems likely that much the same was true for most of the period 1956-90. All but one of the Mauritians had never done

<sup>58</sup> ORSTOM and IGT, *Atlas*, section D3a; Conde et al, *South-North*, p.94; EIU, *Guinea, Mali, Mauritania Country Profile 1992 - 93*, p.62; Interview: Doh Gilles (2nd.); Chateau, 'Recensement'.

<sup>59</sup> Interview: La Rue.

<sup>60</sup> Interview: Ould Boubakar: Ould Mohammed; Santoir, 'Maure', p.148.



anything but trade in Ivory Coast and the same was true for the majority of NIBAs and Lebanese. There was a high proportion of Lebanese entering trade directly from school or university. Other occupations of Lebanese included carpenters, teachers, a manual worker and a soldier. The pattern of previous occupations of the Lebanese was most likely different 30 or even 20 years earlier. Pre World War Two migrants were mostly small farmers, labourers, tenants or small tradesmen yet none of those interviewed in 1990 had an agricultural background.

### 3.3 PHYSICAL APPEARANCE OF STORES AND PROCESSED FOODS DISTRIBUTED

The first NSE traders seriously to compete with European interests in processed food distribution were the Lebanese. By the early 1950s, the threat which the Lebanese had been perceived as posing to European traders since before the war was very much a reality.<sup>61</sup> Whilst the trading companies remained very much in force for years to come, small independent French traders seem to have declined in importance during this period without comment in available sources. Data from some regional studies (others, because of the way their data are presented, do not permit an analysis) in the early 1960s reveal far fewer French and Lebanese traders at both the wholesale or retail levels.<sup>62</sup>

Descriptions of Lebanese stores in the early 1960s indicate that, like African traders, they were none too concerned with physical appearances. Once the basics were there, walls, roof and floors, "*le commerçant ne pratique aucun investissement dans l'activité professionnelle*". The average size of a general merchandise store was about 20m<sup>2</sup> (textile stores appear to have been larger). Shelves consisted of "*caisses et de planches assemblées*" whilst "*Un grand désordre règne partout*". Traders did not often keep much stock; what was found in the store was

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<sup>61</sup> Binet, 'Libanais', pp.261-262; Bigo, 'Network', pp.512-513.

<sup>62</sup> SEDES, 'Sud-est' [figures are 1964]; BDPA, 'Man' [figures are 1963].

usually all there was,<sup>63</sup> hence the crowded shelves which reached from the ceiling to the floor.<sup>64</sup>

The role of the Lebanese as distributors of processed foods in the 1950s appears to have been principally confined to that of retailers though they did act as semi-wholesalers and wholesalers for some products, and had done so since the 1930s.<sup>65</sup> The reason for this apparently slow progress in processed food distribution can be attributed to the low demand for such products. Even in the 1980s Ivory Coast, the number of processed food product types wholesaled by the Lebanese did not stretch much beyond bouillon cubes, concentrated milk, sardines, tinned tomatoes and three or four other, mainly Nestlé, brands.<sup>66</sup>

As well as displacing many European concerns in the 1950s and 1960s, it has been argued that African traders also suffered.<sup>67</sup> According to Thompson and Adloff the Lebanese "have been displacing the indigenous traders as intermediaries between the exporting firms and African producers".<sup>68</sup> Whilst this was undoubtedly true to a certain extent, the same accusation of usurpation could equally well have been levelled at European interests but few of the earlier European sources consulted, least of all official ones, seem to be aware of their hypocrisy.

From the mid 1960s, the Lebanese moved increasingly from retail stores to semi-wholesaling.<sup>69</sup> By the early 1970s, if not before, most semi - wholesalers were Lebanese.<sup>70</sup> Of the 1,087 Lebanese stores of all kinds around 1969, 325 were semi-wholesale and

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<sup>63</sup> IDET-CEGOS, 'Distribution', p.48.

<sup>64</sup> A.L.Bonnefonds, 'La transformation du commerce de traite en Cote d'Ivoire depuis la dernière guerre mondiale et l'indépendance', Cahiers d'Outre Mer, 21, 84 (octobre-décembre 1968, Bordeaux), p.398; Interview: Drabo: Doh Gilles (2nd.).

<sup>65</sup> Bigo, 'Network', p.512.

<sup>66</sup> Fieldwork: regional distribution survey: observation; DSA: internal reports, L.Bosteen, 'Abidjan Town' and 'Bush Sector'.

<sup>67</sup> Winder, 'Lebanese', p.309-310; V.Thompson and R.Adloff, French West Africa (Allen and Unwin, 1958), p.430.

<sup>68</sup> Thompson and Adloff, French, p.430.

<sup>69</sup> Bonnefonds, 'Traite', p.408.

<sup>70</sup> CCCI, Bulletin Mensuel, 6 (juin 1973), p.92.

762 retail outlets.<sup>71</sup> However, the distinction between a semi-wholesale and a retail store depended on the client. Many stores which retailed to all levels of Africans and Europeans alike acted as semi-wholesalers for itinerant traders.<sup>72</sup> What appears to have happened in practice is an expansion in the stock range, and probably physical size of the store as well, and the taking on of the function of semi-wholesaling without abandoning the retail function. There thus appears to have been a fairly natural evolution from small to gradually larger outlets: profits invested in more stock and then a larger store and more stock, but with little attention paid to superficial appearances.

It can be assumed that, by the mid 1970s, grocery stores apart, the vast majority of Lebanese traders were semi-wholesalers with retailing relegated to a minor portion of the turnover. Some Lebanese were also involved in produce buying with some African traders obtaining goods on the strength of their produce which they sold to the semi-wholesaler.<sup>73</sup> The Lebanese, as before, still obtained their goods from the European companies, sometimes on credit, either from up-country stations or in Abidjan which would have often meant them transporting the merchandise themselves into the interior.<sup>74</sup>

The evolution of the physical appearance of Lebanese stores already outlined seems to have continued up to 1985 with stores increasing their product range and some moving from semi-wholesaling to wholesaling and even importing.<sup>75</sup> After 1985, the

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<sup>71</sup> CEGOS-ECONOMIE, 'Survey', p.24.

<sup>72</sup> H.P.White and M.P.Gleave, An Economic Geography of West Africa (Bell and Sons, 1971), p.203.

<sup>73</sup> Ibid.

<sup>74</sup> CCCI, Bulletin, 6, p.92; SIGES, 'Etude régionale de la sous-préfecture de Bondoukou: commerce et transports' (Ministère du Plan, Abidjan, 1971); BDPA, 'Man'.

<sup>75</sup> Interview: Doh Gilles (2nd.): Mr. Claude Assouan, Directeur d'Achats at CDCI (Abidjan, December 4 1990); Mr. Merhouet, Junior Partner of SABIMEX (Abidjan, November 13 1990); DSA: internal reports, Ayeribi, 'Abidjan' and 'Interior': internal reports, L.Bosteen, 'Abidjan Town' and 'Bush Sector'; Personal experience: observation (1983-85).

range of produce seems to have declined<sup>76</sup> but the physical structure of stores remained the same. Many Lebanese occupied the same stores they did ten, twenty or even thirty years ago, the best example of this being the *bloc libanaise* in Treichville.<sup>77</sup> The main change over these five years seems to have been the entrance of a large number of Lebanese into the import trade, a function usually taken on in addition to rather than instead of wholesaling.<sup>78</sup>

Whilst African outlets, compared to those of the Lebanese and Europeans, were the most numerous by the early 1960s if not before, their limited involvement in processed foods in early years made them somewhat peripheral to this trade. Further, their turnover was comparatively low.<sup>79</sup> The most important consumers of processed foods would have been Europeans who, in all likelihood, would have shopped at a European store if possible.

It was only in the early 1950s that African stores began to pose a serious competitive threat to the European and Lebanese dominance of the retail store sector.<sup>80</sup> But proper stores do not appear to have been the principal type of African controlled outlet for processed foods until the mid or even late 1960s.<sup>81</sup> Instead, less permanent structures were more prolific. Although many of the sources appear to include them in their definition of *magasin* or *boutique*, these outlets were not in fact proper shops or stores. They did however sell some processed foods in small quantities, for example a few spoons of coffee, a handful of sweets, one or two biscuits.<sup>82</sup> These would probably have been purchased from

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<sup>76</sup> Interview: Doh Gilles (2nd.); Fieldwork: brand range survey: product range survey; DSA: internal reports, L.Bosteen, 'Abidjan Town' and 'Bush Sector'.

<sup>77</sup> Fieldwork: observation: discussions with Lebanese traders; Personal experience: observation; Diambra-Hauhouot, 'Agglomeration', p.17.

<sup>78</sup> Interview: Assouan: Mr. Eric Bosteen, Chairman of West Africa Holdings, parent company of SAFA and DANAFCO (Cahors, France, 2nd. interview, February 9 1992); Fieldwork: discussions with Lebanese traders: observation.

<sup>79</sup> IDET-CEGOS, 'Distribution'.

<sup>80</sup> Thompson and Adloff, *French*, p.439; Winder, 'Lebanese', p.310.

<sup>81</sup> Interview: Doh Gilles (2nd.); White and Gleave, *Economic Geography*, pp.200-201; Bonnefonds, 'Traite', pp.398-399.

<sup>82</sup> SEC-OBM, 'Daloa-Gagnoa'; Bollinger, *Marketing*, p.138; Interview: Drabo.

Lebanese stores, at least in areas where there were no European ones.

There were three kinds of these 'semi-stores'. The most rudimentary was the *étalage* or 'display' with which the Dioula were most associated. This seems to have been a large scale *tablier* with goods piled high on a table which may or may not have been covered. Slightly more permanent were the *échope* which were booths or covered street stalls. These were run predominantly by Anongo men, sold a fairly wide variety of goods, and seem to have had some sort of rudimentary shelving. Finally, there were a large number of mainly Anongo women selling general merchandise from the back of their houses. These outlets varied from a table in front of the house to a room at the back with shelving.<sup>83</sup>

The riots of 1968 referred to above may have discouraged the semi-store type of outlet. By their vary nature - goods unprotected on the side of the street - these outlets would have been particularly vulnerable to looting and the stalls easy to destroy. A proper store, on the other hand, was protected by its walls and could be locked up in the event of trouble, making it a less tempting target. It may well be that Anongo men, who owned proper stores with metal bars and grills in front of the counter (thereby making only a small part of the store accessable to the customer)<sup>84</sup> only did so after the rioting in 1968.

At the same time as these semi-stores existed, there were also a number of proper African shops, similar to those owned by Lebanese retailers.<sup>85</sup> Thus, in the 1950s, 1960s and early 1970s there was a wide range of African retail outlets: to the ones already mentioned must be added market traders, *tabliers* and hawkers but it was by and large the former which sold processed foods. The types and physical appearances of African-owned retail outlets continued to evolve up to the early or mid 1970s. Since

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<sup>83</sup> *Ibid.*

<sup>84</sup> Interview: Doh Gilles (2nd.).

<sup>85</sup> IDET-CEGOS, 'Distribution', .

then they have changed very little. The *étalages, échoppes* and back-of-the-house outlets evolved into small retail stores often with a surface area of as little as 4m<sup>2</sup> <sup>86</sup> and a number of them eventually became wholesalers.<sup>87</sup> The market traders (who by the 1980s were selling some processed foods), hawkers and *tabliers* appear to have changed very little in their working practices over all these years.<sup>88</sup>

By the 1960s increasing numbers of Africans were consuming processed foods and for them the local (i.e. African) store was invariably the most convenient point for purchase. Concentrated milk, biscuits, sweets, sardines, tinned tomatoes, coffee, cigarettes, chocolate powder drink, chicory and tomato puree could all be found in African outlets by the mid to late 1960s. Other products available included sugar, petrol, matches, some pharmacy goods (illegal now), cooking oil, beer, wine and soap.<sup>89</sup>

This range of products continued to increase until at least 1980 and probably up to 1985. By 1990 there was a decline in range, specifically in the percentage of stores stocking non-basic but commonly consumed items (e.g. coffee, oats, chocolate powder).<sup>90</sup> As the chapter on consumers shows, the decline in income per head was the main reason for this. However, it is important to re-emphasise what was said in the previous chapter: that there were significant regional variations in products stocked by African stores.

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<sup>86</sup> Interview: Doh Gilles (2nd.); Fieldwork: observation.

<sup>87</sup> IDET-CEGOS, 'Distribution'.

<sup>88</sup> Ibid; Bonnefonds, 'Traite', pp.398-399; White and Gleave, Economic Geography, pp.197-201 ; Interview: Doh Gilles (2nd.); Fieldwork: observation.

<sup>89</sup> Interview: Doh Gilles (2nd.); SEDES, 'Région de Korhogo. Etude de développement socio-économique' (Ministère du Plan, Abidjan, 1965); Bonnefonds, 'Traite', p.399. Bonnefonds does not actually say any of these products were in the stores but it seems likely if they were in the 'semi-stores'.

<sup>90</sup> Fieldwork: product range survey; regional distribution survey; DSA: internal report, Ayirebi, 'Abidjan': internal report, L.Bosteen, 'Abidjan Town' and 'Bush Sector'. A comparison between these three surveys reveals that the percentage of stores stocking certain food items increased and then decreased which would imply that the product range followed the same trend.

The physical structure and size of Mauritanian stores from the time of their arrival in the early 1970s was not much different from that of other small retailers.<sup>91</sup> It also appears that, as in Senegal, Mauritanians paid little attention to physical appearance and invested very little in the upkeep of the store.<sup>92</sup> For goods stocked, the range in 1985 and in 1990 was little different from that of other small African outlets except that the few which existed in the west tended to vary their product range less than other African stores.<sup>93</sup> However, as will become evident in the next section, their purchasing methods and general organisation were unique.

In summarising this section, attention should be drawn to the small number of changes in the physical structure of stores of groups of traders since the early 1970s. As far as function was concerned, Lebanese stores evolved in that the majority used primarily to be small retail outlets and by 1990 were primarily semi-wholesale or wholesale stores. African and Mauritanian stores remained predominantly retailers with respect to processed foods. The most significant changes concerned the scale of operations i.e. turnover for Lebanese stores and the greatly expanded product range for African outlets.

#### **3.4 THE STRENGTHS AND WEAKNESSES FOR NSE TRADERS OF FAMILY AND ETHNIC LINKS**

One of the key features of NSE traders, Lebanese or African, was the importance of family and community to trading activities. No store owner or manager was independent of his relatives or members of his ethnic group. Numerous sources have remarked upon this and have generally concluded that these ties hindered

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<sup>91</sup> Fieldwork: observation; Interview: La Rue; Personal experience: discussions with traders.

<sup>92</sup> Fieldwork: observation; Personal experience: observation; Santoir, 'Maure', p.157.

<sup>93</sup> DSA: internal reports, L.Bosteen, 'Abidjan Town' and 'Bush Sector': internal report, Ayirebi, 'Abidjan'; Fieldwork: regional distribution survey.

the advancement of enterprises in the Third World.<sup>94</sup> At the same time though, family and community have often proved essential to starting up enterprises and Chapter 2 has already illustrated the vital role played by trading networks and connections in the success of Dioula and other traders during the precolonial and colonial years. This section will show that these connections remained an important part of commercial success despite the burdens which they often placed upon traders.

The most visible sign of family/community involvement was the employment of relatives in stores and the well known practice of established Lebanese bringing over relatives from Lebanon.<sup>95</sup> Khuri, who studied Lebanese communities in what was then Upper Volta, claimed that this was common amongst the Lebanese in the late 1950s and early 1960s throughout West Africa.<sup>96</sup> In 1980s Ivory Coast there were many examples of relatives and people from the same village working in the proprietor's store.<sup>97</sup> Mauritians have also employed family members since they first came,<sup>98</sup> much as they did in Senegal in the 1970s and earlier.<sup>99</sup> For other Africans the practice has also long been widespread as many authors have observed.<sup>100</sup> Many also employed people who were not relatives but came from the same region or ethnic

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<sup>94</sup> For example, J.Kinsey, Marketing in Developing Countries (Macmillan, Basingstoke, 1988), pp.273-275; G.Hunter, The New Societies of Tropical Africa (OUP, 1962), pp.139-140.

<sup>95</sup> Bigo, 'Network', p.514; A.Tirefort, 'Le "Baudit Libanais" ou le mal-aimé - approche de la communauté Lybano-Syrienne en Basse-Cote d'Ivoire pendant l'entre-deux-guerres', IHAAA, 7 (1981), p.65.

<sup>96</sup> F.I.Khuri, 'Kinship, Emigration and Trade Partnership Among the Lebanese of West Africa', Africa, 35, 4 (1965), p.394.

<sup>97</sup> Personal experience: discussions with Lebanese traders; Interview: Mr. Reda Fakhry, Lebanese wholesaler (Lakota, November 24 1990); Fieldwork: discussions with Lebanese traders. Examples include Fakhry Reda and family in Lakota since the early 1960s, Chouman Abbas and his four sons in Agnibilekro in the 1980s and Kabbani Bassam and his cousin in Treichville from 1984 to 1988.

<sup>98</sup> Interview: Ould Boubakar.

<sup>99</sup> Santoir, 'Maure', pp.155-156.

<sup>100</sup> For example, E.O.Akeredolu-Ale, 'A Sociohistorical Study of the Development of Entrepreneurship among the Ijebu of Western Nigeria', ASR, 16, 3 (1973), pp.360-361; Kennedy, Capitalism, p.154.



group.<sup>101</sup> The data on family employment in Table 7 are consistent with these observations

TABLE 7: EMPLOYMENT OF FAMILY MEMBERS, PERCENTAGES, 1990.

|             | ABJ<br>NIBA | INT<br>NIBA | ABJ<br>MAU | INT<br>MAU | ABJ<br>LEB | INT<br>LEB | ABJ<br>IVO | INT<br>IVO |
|-------------|-------------|-------------|------------|------------|------------|------------|------------|------------|
| Family      | 39.0        | 78.5        | 100.0      | 88.0       | 94.5       | 69.0       | 71.5       | 74.0       |
| SAMPLE SIZE | 18          | 23          | 10         | 17         | 18         | 32         | 14         | 23         |

Source: Fieldwork: questionnaires (1990).

Whilst the samples are small, the figures do show that stores were very much family enterprises. Most stores which did not employ family members employed someone from their own ethnic group. This was particularly true of NIBA traders. Most of those who employed non-family Ivorians did so in addition to family members. The Ivorian sample included former Chaine Avion outlets and a few grocery stores which often employed non-family Ivorians. Questioning of the managers revealed that virtually all were of the same ethnic group as their proprietors and many were also family members in 1976 as well.<sup>102</sup> As Kennedy found in Ghana,<sup>103</sup> one strength of these employment practices was that proprietors could trust relatives more than strangers, especially where money was concerned.

Employment of relatives usually served as an apprenticeship for that relative. From the proprietor they gained trading experience and were perhaps paid a small sum in cash or kind which they could save towards purchasing their own store. Santoir observed this in the Mauritanian community in Senegal in the early 1970s<sup>104</sup> and much the same was true later in Ivory Coast. Here, newly arrived immigrants were employed in an elder's store and

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<sup>101</sup> Personal experience: discussions with traders; Fieldwork: discussions with traders. Examples include Iboudou Ablasse who, until 1985, employed his brother Nana Rasmane in Adjame, and Diarra Samba of Yopougon who employed a large assortment of relatives and kinsmen since the late 1970s.

<sup>102</sup> Chateau, 'Recensement'.

<sup>103</sup> P.Kennedy, Ghanaian Businessmen (Weltforum Verlag, Munich, 1980), p.109.

<sup>104</sup> Santoir, 'Maure', pp.155-156.

accumulated their pay until they had enough money to start their own outlet or else take over from the elder. This apprenticeship lasted up to ten years or more.<sup>105</sup> Khuri stated that with the Lebanese in West Africa, newly arrived immigrants wishing to set up in trade were sponsored by an established trader for whom he worked until he had 'proven' himself (the definition of which could be contested for the sponsor may see the new trader as cheap labour).<sup>106</sup> The same patterns of employment and apprenticeship have long been evident amongst many other African groups, especially the Dioula and the Hausa as illustrated in the previous chapter.<sup>107</sup> Table 8, showing the ages and length of time spent in stores of proprietors and managers, can be related to these observations.

TABLE 8: AVERAGES OF AGE AND TIME SPENT IN CURRENT STORE BY TRADER PROPRIETORS AND MANAGERS, 1990.

| DESIGNATION           | ABJ  | INT  | ABJ  | INT  | ABJ  | INT  | ABJ  | INT  |
|-----------------------|------|------|------|------|------|------|------|------|
|                       | NIBA | NIBA | MAU  | MAU  | LEB  | LEB  | IVO  | IVO  |
| Proprietors: age      | 35.4 | 39.6 | 36.2 | 39.0 | 32.1 | 39.6 | 33.4 | 36.9 |
| Managers: age         | 30.0 | 29.9 | 29.6 | 27.9 | 23.8 | 28.1 | 24.7 | 26.5 |
| Props: years in store | 4.4  | 6.5  | 6.9  | 4.6  | 8.7  | 9.9  | 3.0  | 6.3  |
| Mans: years in store  | 0.8  | 2.4  | 3.4  | 0.8  | 2.3  | 3.6  | 1.9  | 3.2  |
| SAMPLE SIZE: Props    | 18   | 23   | 10   | 17   | 18   | 32   | 14   | 23   |
| : Mans                | 12   | 17   | 20   | 23   | 12   | 8    | 16   | 17   |

Source: Fieldwork: questionnaires (1990).

In 1976, over 75% of proprietors of all kinds of establishments were under forty years of age and Ivorians were found to be the youngest on average.<sup>108</sup> By 1990 this appeared to have changed little. Ivorian ages were similar to those of the NIBAs but, as in 1976, they were the youngest. Less easy to explain is why Abidjan traders were on average younger than their counterparts

<sup>105</sup> *Ibid.*, pp.150, 155-156; Interview: Ould Boubakar: Ould Mohammed: La Rue.

<sup>106</sup> Khuri, 'Kinship', p.394-395.

<sup>107</sup> Fieldwork: observation: discussions with traders; Personal experience: observation: discussions with traders.

<sup>108</sup> Chateau, 'Recensement'. All information subsequently quoted from this source is for towns with a population of ten thousand plus, unless otherwise stated.

in the interior but of a number of possible reasons one of the most likely was that the bright lights and seemingly greater opportunities of Abidjan appealed more to less experienced traders who perhaps failed to consider that competition was also stiffer there. Managers and proprietors in Abidjan appeared to be less durable than in the interior, possibly because competition was far tougher even though, paradoxically, it was easier to get started there.<sup>109</sup> The difference in time spent in stores between proprietors and managers of around four years might indicate that this was the average length of the apprenticeship. If so, this practical experience should have proven to be a significant advantage to NSE traders.

Another advantage of the apprenticeship system was that it allowed many Mauritanian and Black African stores to open for long hours without the proprietor needing to be around constantly. For Mauritanians in Senegal "*la boutique est ouverte pratiquement douze mois sur douze, et jusqu'a vingt heures sur vingt-quatre. Un system de relais s'établit entre le patron et ses aides*".<sup>110</sup> Much the same was observed in Ivory Coast where Mauritanian stores tended to stay open later than other small retailers as many were located in residential areas rather than in commercial districts. Traders usually slept in a room at the back of the store. Some stores had three or four traders.<sup>111</sup> Black Africans operated in a similar manner: stores near crossroads such as Yabayo (where the Man-San Pedro road meets the Gagnoa road) were often open all night to cater for lorry drivers hauling timber from the Man-Guiglo regions down to the ports of Abidjan

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<sup>109</sup> This is consistent with research done by Paul Kennedy in Accra. He argued that the ease of entry into the informal sector creates heightened competition and labour instability for Ghanaian enterprises. He concluded that "These, in turn, may either drive them out of the sector altogether or severely restrain them from generating new wealth through greater productivity, beyond a certain point". See P.Kennedy, 'Cultural Factors Affecting Entrepreneurship and Development in the Informal Economy in Ghana', *IDS Bulletin*, 8, 2 (1976), p.19.

<sup>110</sup> Santoir, 'Maure', p.156.

<sup>111</sup> Fieldwork: observation; Interview: La Rue; Personal experience: discussions with traders.

or San Pedro.<sup>112</sup> However, Lebanese stores had much shorter hours and did not use a relay system like Africans.<sup>113</sup> With most Lebanese stores located in commercial districts and with most wholesale and semi-wholesale transactions taking place between six in the morning and noon, there was little to be gained from evening trading.

Once an assistant had served the apprenticeship the next step was owning a store though some Mauritians in Senegal returned home without desiring to become proprietors<sup>114</sup> and this may also have been true for Ivory Coast. For Mauritians it appears that the community was as important as the family with religious leaders perhaps playing a central role. Accounts varied as to the degree of control and organisation but this probably reflected differing practices in some communities. Some traders in Ivory Coast appeared to assist relatives and people from their home region in much the same way as they did in Senegal. In Ivory Coast at least, the elder may also have assisted them when they set up their own store. This might have included commercial advice, helping to find a store and providing some financing and credit.<sup>115</sup> The extent to which elders exercised authority over newcomers who requested help doubtless varied between communities.

Goods purchasing was sometimes done on credit with the assistance of the elder or religious leader who acted as intermediary between the traders in his area and the Lebanese or WSE suppliers. For this service each trader paid a small fee but the goods were purchased in their name. As Cohen observed with the Hausa in Nigeria,<sup>116</sup> the Mauritanian was provided with a ready line of credit and was in a supportive environment, factors which greatly increased his chances of overcoming 'teething'

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112 Personal experience: discussions with salesmen; Fieldwork: observation: discussions with traders.

113 Personal experience: observation; Fieldwork: observation.

114 Santoir, 'Maure', p.156.

115 *Ibid.*, pp.150, 155-156; Interview: Ould Boubakar: Ould Mohammed: La Rue; Personal experience: discussions with salesmen.

116 A.Cohen, Custom and Politics in Urban Africa (Routledge and Kegan Paul, 1969), pp.19-20.

problems. The installation of grills in front of counters was also a result of organisation, the purchases having been made in bulk.<sup>117</sup> However, not all Mauritians operated as a group in this manner. Some managed their affairs fairly independently of one another though that did not preclude some form of co-operation.<sup>118</sup>

For other African traders there is little published information directly relating to Ivory Coast though it would appear that the Dioula network was important for store owners starting up. Amongst other groups, support may also have been forthcoming but was perhaps less widespread and less organised than with either Mauritians or Lebanese traders. That so many African small retailers purchased goods independently is consistent with these observations.<sup>119</sup> Transactions between retailers were, for reasons not difficult to fathom, fairly rare. Between wholesalers and retailers the pattern appeared to be not much different from transactions with the Lebanese unless the traders were of the same group, especially the Dioula. In this respect, Islam was of great importance among the Dioula.<sup>120</sup> NIBA traders interviewed in 1990 were, the Lebanese apart, the most likely to have obtained financial assistance from family or friends when setting up their business. Ivorians, on the other hand, were the least likely. That most of the former were Muslims and most of the latter Christians (see Table 9 below) might well account for this difference. However, there is no ready explanation for differences observed between interior and Abidjan proprietors regarding sources of finance.<sup>121</sup>

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<sup>117</sup> Interview: La Rue.

<sup>118</sup> Interview: Ould Boubakar; Ould Mohammed; Personal experience: observation.

<sup>119</sup> Fieldwork: observation: discussion with Senegalese trader in Adjame (December 1990); Personal experience: observation: discussions with traders.

<sup>120</sup> Lewis, 'Dioula', pp.272-302; Personal experience: two Jumbo cube semi-wholesalers, one in Yopougon, the other in Anyama, had financial difficulties 1985-86 and their debts were paid off by members of the local Dioula community. See DSA: credit client sheets (1985-86). See also Kennedy, Capitalism, pp.141-146.

<sup>121</sup> Fieldwork: questionnaires.

Commercial transactions of Black African retailers appear to have changed little since the 1950s, except in aggregate size. Traders have long obtained most of their supplies from the Lebanese with those supplied by European trading companies increasingly on the decline since the early 1960s. However, as illustrated in the previous chapter, they were still important as suppliers in some areas well into the 1980s. Terms of payment usually depended on the supplier's knowledge of the client with credit periods ranging from a few days to a month. This gave the Lebanese a distinct advantage as they were closer to African traders than were the Europeans.<sup>122</sup> The ability of African traders to obtain credit might well have been hampered if they were without the support of a trade network.

From the late 1970s, but less so since 1985, small retailers could also obtain supplies from travelling salesmen of Abidjan based import companies. Conditions of payment would again depend on knowledge of the client but credit was rarely granted to small retailers. This weakness was partly compensated for by travelling salesmen frequently giving small retailers a few days unofficial credit, this being possible when a salestrip involved returning to Abidjan along the same route.<sup>123</sup>

For example, a salesman on a trip to San Pedro would travel up the motorway to N'Douci and from there follow the road west, passing through to sell at Tiassale, Divo, Gagnoa and possibly Lakota on the way. After Gagnoa, the salesman might also stop at Soubre on the way to San Pedro. Traders in San Pedro could only get unofficial credit for as long as the salesman was there, usually a day or two. At Soubre, the trader might get three days of unofficial credit and in towns thereafter the period was longer with maybe six days at N'Douci. The salesman was thus depositing goods on the way to San Pedro and cashing in the bills on the

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<sup>122</sup> CCCI, *Bulletin*, 6, p.92; IDET-CEGOS, 'Distribution'; Winder, 'Lebanese', p.310; Personal experience: discussions with Lebanese and African traders; Fieldwork: discussions with traders; Interview: Merhouet.

<sup>123</sup> Interview: Doh Gilles (2nd.); Personal experience: from 1984 to 1985 I was responsible for organising salestrips at DANAFCO. Salesmen of other companies also practiced the same system of unofficial credit with the traders they trusted.

return journey. For the few African semi-wholesalers and wholesalers, official credit was usually the norm. Many such wholesalers were Hausa or Dioula and instances of non-payment were rare.<sup>124</sup>

On African processed food semi-wholesalers and wholesalers, little has been said so far because there were very few of them, even in 1985 when product range appeared to have reached its maximum. The Lebanese had already cornered this area of the market and whilst there were some notable exceptions to the rule,<sup>125</sup> African traders have either been content to leave it that way to concentrate on local basic foodstuffs or have been unable to compete, or a combination of both. The only significant activity in this area was the role African stores played as semi-wholesalers to market traders, a role which is assessed in some detail in Chapter 7 on the cube trade.

Since at least the late 1950s, when a new Lebanese trader set up on his own he was financed by other traders in the town or district who supplied him with goods. This was his loan but there were no formal transactions so he was 'advised' to stay in the same town. Upon achieving self-sufficiency, the traders who loaned the goods demanded repayment i.e. he was now a competitor and they could not afford to grant him such a favour any longer. The new trader was thus fully independent once the loans had been repaid and there were very few who returned to Lebanon without succeeding. This system was most common amongst brothers, in-laws and cousins but never between husband and wife and rarely between father and son.<sup>126</sup> Thus, as Binet remarked, "*La solidité des familles et le controle social sont bien marqués*"<sup>127</sup> with the family often living above the store<sup>128</sup> and sons of traders frequently locating close to their parents.<sup>129</sup>

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<sup>124</sup> Ibid; DSA: internal reports, L.Bosteen, 'Abidjan Town' and 'Bush Sector'.

<sup>125</sup> DSA: internal report, Ayirebi, 'Abidjan': internal reports, L.Bosteen, 'Abidjan Town' and 'Bush Sector'.

<sup>126</sup> Khuri, 'Kinship', p.394-395.

<sup>127</sup> Binet, 'Libanais', p.261.

<sup>128</sup> Ibid; White and Gleave, Economic Geography, p.203; Fieldwork: observation, e.g. the Ali family in N'Douci; Personal experience:

Family members in the Lebanese community, be they in different sectors of the economy or regions of the country, have provided information, credit and other financial assistance to one another since before independence.<sup>130</sup> There is little doubt that this occurred in the 1980s<sup>131</sup> and trader interviews in 1990 revealed that around half of the proprietors questioned had received financial assistance from family or friends.<sup>132</sup> Cruise O'Brien has noted that in Senegal "Small-scale Lebanese -traders and entrepreneurs have always depended on community networks to relay information and facilitate credit".<sup>133</sup> Such support would have helped to give them the financial security which had previously been considered to be a major advantage of the big trading companies over their competitors (and which still was concerning major investments).<sup>134</sup>

From personal experience from 1983-85 and fieldwork conversations, it was evident that many Lebanese traded with each other, the larger ones wholesaling to semi-wholesalers and retailers and semi-wholesalers selling to retailers. Transactions between two wholesalers or two semi-wholesalers also occurred and often involved an exchange of goods in addition to or instead of cash transactions. It appears that these advantageous commercial links did not extend beyond family and friends and transactions were mostly on credit terms of between twenty and thirty days, sometimes more, sometimes less.<sup>135</sup>

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observation, e.g. the Bejani family in Divo until 1985 when they left the country.

<sup>129</sup> Fieldwork: observation, e.g. the Zabads in Dabou; White and Gleave, Economic Geography, p.203.

<sup>130</sup> A.R.Zolberg, One Party, p.118.

<sup>131</sup> Fieldwork: discussion with Merhouet Ali, semi-wholesaler in Port Bouet (October 1990); Personal experience: discussions with Lebanese traders, e.g. Fakhry Reda of Lakota (1984).

<sup>132</sup> Fieldwork: questionnaires.

<sup>133</sup> R.Cruise O'Brien, 'Lebanese Entrepreneurs in Senegal: Economic Integration and the Politics of Protection', CEA, 15, 57 (1975), p.111.

<sup>134</sup> Ibid. The financial power of the trading companies is perhaps best explained in P.Bauer, West African Trade (CUP, Cambridge, 1954), pp.89-191.

<sup>135</sup> Personal experience: discussions with Lebanese traders; Fieldwork: discussions with Lebanese traders.



Whilst no instances of trade between Muslims and Christians were known except between wholesalers and importers or manufacturers, the reasons for this were probably little to do with religion *per se*. Rather it was family and people from the same town, village or area in Lebanon that was important.<sup>136</sup> For many African traders, religion, as already observed, has long been a crucial part of trade relations, being tied up with trust and access to credit and information. Chapter 7 shows that this was especially true with the Dioula in more recent times as well as during the period covered by Chapter 2. Table 9 below shows the percentages of traders according to their religion.

TABLE 9: TRADERS' RELIGION, PERCENTAGES, 1990.

| RELIGION        | ABJ<br>NIBA | INT<br>NIBA | ABJ<br>MAU | INT<br>MAU | ABJ<br>LEB | INT<br>LEB | ABJ<br>IVO | INT<br>IVO |
|-----------------|-------------|-------------|------------|------------|------------|------------|------------|------------|
| Islam           | 93.5        | 87.5        | 100.0      | 100.0      | 86.5       | 77.5       | 30.0       | 30.0       |
| Christianity    | 6.5         | 12.5        |            |            | 13.5       | 20.0       | 60.0       | 62.5       |
| Animism         |             |             |            |            |            |            | 10.0       | 7.5        |
| Islam/Christian |             |             |            |            |            | 2.5        |            |            |
| SAMPLE SIZE     | 30          | 40          | 30         | 40         | 30         | 40         | 30         | 40         |

Source: Fieldwork: questionnaires.

The contrast between Ivorians and Black Africans is marked but easily enough explained. The high proportion of Christians amongst Ivorians can be partially attributed to the number of former PAC and Chaine Avion traders among their number. Most of these *gerants* were from the Baoule and Agni groups<sup>137</sup> which was where most of the stores were located and the proportion of Christians amongst the Akan was higher than the national average.<sup>138</sup> Additionally, the Akan had a higher standard of education than the predominantly Muslim northern groups<sup>139</sup> and both PAC and Avion required a certain level of educational

<sup>136</sup> Gilmour, *Fractured*, chapter 2; Bigo, 'Network', p.517.

<sup>137</sup> DSA: credit client files (1980-90).

<sup>138</sup> Mundt, *Historical Dictionary of Ivory Coast* (Scarecrow Press, Metuchen, 1987), pp.24, 37-38, 98, 120.

<sup>139</sup> ORSTOM and IGT, *Atlas*, section B3a.

attainment amongst those they recruited.<sup>140</sup> Although they had the advantage of a formal education (discussed in Chapter 4), Christians did not have the benefit of a trade network. This would be a key weakness for non-Dioula Ivorians. As far as the NIBAs were concerned, most were from predominantly Islamic countries (Mali, Burkina).

The final area, remittances to relatives, was a widespread practice and a weakness for most NSE traders. It was not uncommon for Lebanese families or individuals to send some money to their relatives in Lebanon<sup>141</sup> though the data in Table 10 below indicates that they were the least likely to do so. The reasons for this probably had much to do with the fact that many Lebanese had been in Ivory Coast so long that either they had no relatives left in Lebanon or else the passing of time had lessened the obligation to provide support. With reference to the table, the figures may be distorted downwards due to concern about the legality of remittances.

TABLE 10: FOREIGN TRADERS SENDING FAMILY REMITTANCES ABROAD AND IVORIANS SENDING FAMILY REMITTANCES, PERCENTAGES, 1990.

| REMITTANCES | ABJ<br>NIBA | INT<br>NIBA | ABJ<br>MAU | INT<br>MAU | ABJ<br>LEB | INT<br>LEB | ABJ<br>IVO | INT<br>IVO |
|-------------|-------------|-------------|------------|------------|------------|------------|------------|------------|
| Yes         | 73.5        | 62.5        | 66.5       | 50.0       | 33.5       | 32.5       | 66.5       | 57.5       |
| No response |             |             | 3.5        |            |            |            |            |            |
| SAMPLE SIZE | 30          | 40          | 30         | 40         | 30         | 40         | 30         | 40         |

Source: Fieldwork: questionnaires.

Most Mauritians sent remittances even though probably many were saving to obtain their own store. Mauritians in Senegal sent money to their families back home<sup>142</sup> whilst this was also common practice for those working in France. There it was found that 84.4% sent money at least once a quarter and virtually all of

<sup>140</sup> RCI, 'Le Programme d'Action Commerciale' (Ministère de l'Economie et des Finances, Abidjan, 1971), pp.6-8.

<sup>141</sup> Binet, 'Libanais', p.262.

<sup>142</sup> Santoir, 'Maure', pp.155-158.

this was to support the family.<sup>143</sup> That fewer in Ivory Coast sent money was probably related in part to the small amount they earned. The proportionately fewer Mauritanian traders in the interior sending money abroad could be due to their having been established for a shorter period than those in Abidjan. The Ivorian government estimated that, in 1987, some twenty billion CFA was sent to Mauritania.<sup>144</sup>

This section has shown the importance of family and community to NSE traders, particularly amongst Lebanese, Mauritanian and other Islamic entrepreneurs. Ethnic and family links meant information, labour, financial and other benefits both for new traders and established businessmen. Many Ivorian traders, actual and potential, lacked both organisation and a common religion and consequently were disadvantaged compared to most immigrant groups.

### 3.5 FOREIGN COMMUNITIES: ECONOMIC, POLITICAL AND SOCIAL CONTROVERSIES

Despite the evident problems of the European trading companies and the successes of the Lebanese from the middle of the 1950s, as well as many African traders, the earliest comprehensive investigation of distribution activities in Ivory Coast (1963)<sup>145</sup> remained blinded by its (French) authors' own biases. Many of the views expressed range from the simplistic to the racist to the unbelievably short sighted. The most ironic of all the statements made about the Lebanese was that "*sa recherche est souvent à courte vue et son point de vue égocentrique*". Another gem is "*Curieusement le Libanais, commerçant depuis des générations, au contact des grandes compagnies européennes n'a pas le sens du commerce moderne*". Finally, the authors stated that the Lebanese had no measure of the social functions of traders, of "*service au client*". This, they concluded, was typified by "*par exemple face à*

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<sup>143</sup> Conde et al, South-North, pp.108-109.

<sup>144</sup> Interview: La Rue.

<sup>145</sup> IDET-CEGOS, 'Distribution'.

*notre enquête, il est resté méfiant et non concerné.*"<sup>146</sup> Most of these comments about the Lebanese have also been related to African traders. Sadly, many of the above views have been frequently reiterated since and at times have re-emerged in recent state attacks against the NSE sector. As most of the controversies for much of the period bar recent years have concerned Lebanese activities, it is on this community that this section will concentrate.

Complaints have been frequent about the lack of employment creation for Ivorians by Lebanese traders. The principal reason for this has always been that the Lebanese work on a family basis.<sup>147</sup> The Lebanese, as was the case elsewhere,<sup>148</sup> were accused of employing too few people at too low a wage.<sup>149</sup> In 1976, only 10% of tertiary sector Lebanese enterprises employed more than five people, the average being 3.2 per enterprise (compared to 28.3 for both the primary and secondary sectors). Nonetheless, these figures compared reasonably with other tertiary sector enterprises as the Lebanese represented 6.2% of outlets but employed 8.1% of the personnel.<sup>150</sup> If turnover were taken into account, the picture would not look so positive but Table 11 below clearly shows that the Lebanese were the most likely NSE store owners to employ Ivorians. Particularly noticeable was how few NIBA and Mauritanian stores used Ivorians.

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<sup>146</sup> Ibid, p.54.

<sup>147</sup> Winder, 'Lebanese', p.309.

<sup>148</sup> For example, in Senegal. See R.Cruise O'Brien, 'Protection', p.103.

<sup>149</sup> Winder, 'Lebanese', pp.313-314; EIU, Report, (No.2, 1990), p.11.

<sup>150</sup> Interview: Mr. Fofana Coulibaly, Director of the Ecole de Commerce (Abidjan, December 4 1990).

TABLE 11: EMPLOYMENT OF NON-FAMILY IVORIANS BY PROPRIETORS, PERCENTAGES, 1990.

|             | ABJ<br>NIBA | INT<br>NIBA | ABJ<br>MAU | INT<br>MAU | ABJ<br>LEB | INT<br>LEB | ABJ<br>IVO | INT<br>IVO |
|-------------|-------------|-------------|------------|------------|------------|------------|------------|------------|
| Ivoriens    | 0.0         | 8.5         | 0.0        | 6.0        | 61.0       | 78.0       | 43.0       | 35.0       |
| SAMPLE SIZE | 18          | 23          | 10         | 17         | 18         | 32         | 14         | 23         |

Source: Fieldwork: questionnaires.

The Lebanese also invested heavily in property and played a major role in transport as well as owning many petrol stations, cinemas, hotels, dress shops, taxis and hairdressers. Controversies about their activities extended into these areas.<sup>151</sup> In 1976 there were 98 secondary sector enterprises with at least 50% Lebanese participation, employing 2,777 people.<sup>152</sup> By 1984 Lebanese interests controlled over half of the units of production of local industry.<sup>153</sup>

TABLE 12: PROPRIETORS' OTHER INTERESTS, PERCENTAGES, 1990.

| INTERESTS     | ABJ<br>NIBA | INT<br>NIBA | ABJ<br>MAU | INT<br>MAU | ABJ<br>LEB | INT<br>LEB | ABJ<br>IVO | INT<br>IVO |
|---------------|-------------|-------------|------------|------------|------------|------------|------------|------------|
| Housing       | 5.5         | 4.5         | 10.0       | 6.0        | 5.5        | 3.0        | 14.5       | 4.5        |
| Video club    |             |             |            |            | 11.0       |            |            |            |
| Kiosk         | 5.5         |             |            |            |            |            |            |            |
| Hotel         |             |             |            |            |            |            |            | 8.5        |
| Restaurant    |             |             |            |            | 11.0       |            |            |            |
| Laundrette    |             |             |            |            | 5.5        |            | 7.0        |            |
| Transport     |             | 4.5         |            |            |            |            |            | 4.5        |
| Not specified |             | 4.5         | 10.0       | 6.0        | 11.0       | 12.5       |            | 13.0       |
| Other         | 5.5         |             |            |            |            |            | 14.5       |            |
| None          | 83.5        | 91.5        | 80.0       | 88.0       | 66.5       | 84.5       | 64.5       | 69.5       |
| SAMPLE SIZE   | 18          | 23          | 10         | 17         | 18         | 32         | 14         | 23         |

Source: Fieldwork: questionnaires.

<sup>151</sup> Binet, 'Libanais', p.261; P.Manning, Francophone Sub-Saharan Africa 1880-1985 (CUP, Cambridge, 1988); Winder, 'Lebanese', pp.307-317; EIU, Report (No.2, 1990), pp.11-12; Bigo, 'Network', pp.525-526.

<sup>152</sup> A.Coulibaly, 'L'emploi dans les entreprises libano-syriennes de Cote d'Ivoire' (Office National de Formation Professionel, Abidjan, 1978).

<sup>153</sup> I.Kone, 'Le pouvoir libanais', Afrique Nouvelle, 1846 (novembre 1984), p.14.

The Lebanese position on salaries is harder to defend when compared to European employers. In June 1990 employees of Lebanese entrepreneurs went on strike. Many claimed low pay at irregular dates and without payslips and there were also complaints over the general lack of workers' rights.<sup>154</sup> Salesmen in 1990 received 10 to 25,000 CFA per month and managers 50,000.<sup>155</sup> A junior salesman in the formal sector could expect to receive around 55,000 per month.<sup>156</sup> However, the sums paid by the Lebanese were probably no less than those paid one way or another in other areas of the NSE sector and WSE sector employees would probably receive much lower pay were it not for strict government regulations on minimum wages.

Lebanese traders have also been criticised for their 'flexible' attitude to granting credit and the importing and pricing of goods. Of all traders, the Lebanese were regarded as the least likely to observe semi-wholesale or retail prices recommended by suppliers. Among the products which suffered from this tendency to cut prices for quick turnover were Maggi cubes and Prima skin cream. Adnan Ajani of Lakota was cut off by the suppliers of Wonder batteries (1983) and Jumbo (1984) for this reason.<sup>157</sup> However, whilst suppliers may see retail price cutting as being against their interests, consumers do benefit. This issue is discussed in more detail in Chapter 7.

Unlike in the early 1960s, prices varied little from store to store in the 1980s for processed foods in urban areas, whether the store was in Abidjan or Odienne.<sup>158</sup> This was despite the impression one might have got from reading the government newspaper Fraternité Matin which, in conjunction with the Ministry of Commerce, decided to wage war on traders who passed on to

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<sup>154</sup> EIU, Report, (No.2, 1990), p.11; P.M.Abiali, 'De nombreux magasins libanais restes fermés', Fraternité Matin, 7705 (juin 12 1990).

<sup>155</sup> Abiali, 'Magasins'.

<sup>156</sup> Fieldwork: discussions with salesmen.

<sup>157</sup> Personal experience: discussion with Abdoul Mourad, DANAFCO Marketing Manager (1984); DSA: internal reports, Ayeribi, 'Abidjan' and 'Bouake'.

<sup>158</sup> Fieldwork: observation; IDET-CEGOS, 'Distribution'.

consumers a new 5% sales tax on most goods.<sup>159</sup> Fines were imposed and lists published with names of traders who had so erred. However, with headlines such as "*La guerre continue*"<sup>160</sup> one gained the impression that the initiative was essentially politically motivated and aimed at diverting criticism from what was an immensely unpopular measure with all sectors of the economy.<sup>161</sup>

The Lebanese have also long been accused of fraud in their import-export activities. Thompson and Adloff noted in the mid 1950s that "the Levantines are blamed for a decline in the quality of certain French West African exports, notably that of Ivory Coast's cocoa and coffee".<sup>162</sup> Further, "the Syrian-Lebanese in French West Africa have shown themselves adept at evading foreign exchange regulations and sabotaging the government's programme to reduce the cost of living and raise producer's incomes."<sup>163</sup> Again, there may well have been some truth in the accusation but European interests were probably no less guilty in many respects. In fact, a commission set up in 1964-65 to investigate fraud and other irregularities in trade in Ghana found cases against Ghanaians and Indians but none against the Lebanese.<sup>164</sup>

In thinly veiled attacks on the Lebanese, WSE interests have decried the "*concurrence déloyale*" by wholesalers<sup>165</sup> and demanded that "*les opérations de dumping destinées à faire craquer un concurrent soient réprimés par les autorités*".<sup>166</sup> In 1989 the World Bank claimed that there was serious underinvoicing of goods and extensive fraud but did not blame

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<sup>159</sup> See various editions of Fraternité Matin for July 1990.

<sup>160</sup> Fraternité Matin (July 14 1990), p.6.

<sup>161</sup> Fieldwork: observation: discussions with traders and company people.

<sup>162</sup> Thompson and Adloff, French, p.431.

<sup>163</sup> Ibid., p.430.

<sup>164</sup> Binet, 'Libanais', p.261.

<sup>165</sup> SCIMPEX, 'Commission grandes surfaces et superettes: reunion du 3/5/85'.

<sup>166</sup> SCIMPEX, M.Esmail 'Rapport de la commission 9 "Grandes Surfaces" ' (May 28 1985).

any particular group.<sup>167</sup> In effect, it seems likely that both European and Lebanese interests were to blame.<sup>168</sup>

Concerning credit, the Lebanese have, justifiably in many cases, been accused of either delaying payment or not paying their bills at all. Tactics used include bouncing cheques and owning a bank account in one name and a store in another to avoid prosecution for bounced cheques (it was virtually impossible to take legal action for unpaid bills where there was no bounced cheque).<sup>169</sup> As already observed, the closer contacts with and knowledge of African traders gave them advantages over Europeans when granting credit.<sup>170</sup> Muslim Lebanese also had the benefit of a common religion with many African traders.<sup>171</sup> However, these factors were often of minor importance with the Lebanese when trading with Mauritians who had the worst reputation for credit worthiness. Nonetheless, the Lebanese appeared to be the principal suppliers of Mauritians as they were prepared to take more risks than European firms and probably had a better knowledge of their debtors.<sup>172</sup>

A brief case study of one particular Mauritanian trader, covering the years 1984 to his death in 1989 helps illustrate the kind of problems faced in the pursuit of bad debts. Whilst the case of Taleb Amar Ould Mohammed (also referred to as Ould Mohammed Bilal in some legal documents but hereafter referred to as Taleb)

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<sup>167</sup> EIU, Report, (No.2, 1989), p.19.

<sup>168</sup> Kone, 'Pouvoir', p.15; Bigo, 'Network', p.525; Personal experience: observation. There is in fact no doubt that this was (probably still is) the case as numerous conversations with company officials and customs officers in 1983-85 proves. However, it is obviously not possible to reveal these sources, some of whom were employed by major foreign interests.

<sup>169</sup> Personal experience: observation. I was responsible for collecting bad debts in 1984-85. See also DSA: credit client cards (1983-86).

<sup>170</sup> Winder, 'Lebanese', p.310.

<sup>171</sup> Ibid., p.321.

<sup>172</sup> Interview: Merhouet: Mr. Henri Zamble, Chef du Personel at DANAFCO and independant candidate for deputy in the 1990 elections (Abidjan, December 1990); Ould Boubakar: Mr. Frederick Attoh, DANAFCO General Manager (Abidjan, September 1990); La Rue; Fieldwork: discussions with Lebanese traders; Personal experience: discussions with Lebanese traders and with the CICA Marketing Manager (November 1990); observation; DSA: credit client sheets (1984-88).



cannot be construed as being typical of the Mauritanian community, it provides evidence for some of the points made above as well as illustrating the problems suppliers often encountered in pursuing bad debts of all nationalities and types of clients through legal channels.

Taleb first came to the attention of DANAFCO in 1984 when he came up to the Abidjan office offering to pay off the debt of a family member in San Pedro amounting to a little under seven hundred thousand CFA.<sup>173</sup> At the same time he requested Jumbo stock cubes on thirty days credit and after details of his bank account were provided and checked,<sup>174</sup> the goods were delivered by the company's Marketing Director for cubes, one Abdoul Karim Mourad. At the same time some two million CFA of other merchandise were delivered to another of Taleb's stores by the Divers Products Marketing Department (of which I was the Manager). Neither delivery was known to the other department at the time but the sum total of the goods, some five million CFA, was within the credit limit recommended by the bank and post dated cheques had been obtained for both sales.<sup>175</sup>

Just before the cheques bounced, another cube delivery was made to Taleb, bringing the total up to 11 million CFA.<sup>176</sup> The cube Marketing Manager immediately departed for San Pedro to obtain payment in cash but, after several days searching, was unable to find the client. He therefore seized a lorry at Taleb's store, filled it with as many goods as he could, and departed for Abidjan. However, this was done without proper legal proceedings and was in fact illegal. Consequently, upon his return to San Pedro in further pursuit of Taleb, Abdoul Mourad was jailed for a few days in Sassandra (San Pedro is in the *préfecture* of Sassandra).<sup>177</sup>

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<sup>173</sup> DSA: credit client sheets (1984); Personal experience: I was the one he first came to see.

<sup>174</sup> Personal experience: the company's Managing Director at the time, Marc Cheriaux, had a friend at a bank who provided information on clients' credit credibility.

<sup>175</sup> See DSA: credit client sheets (1984-85).

<sup>176</sup> Ibid.

<sup>177</sup> Personal experience: recollection of the events and discussions with A.Mourad and H.Zamble (1984-86); Interview: Zamble.

This was a bad mistake by DANAFCO but the lorry was quickly returned and legal proceedings started against the client, first in Sassandra and later in Abidjan. Taleb responded by launching his own legal proceedings against the company, claiming amongst other things that he had never had any contact with DANAFCO and demanding a court order to close down the company.<sup>178</sup> It was now April 1986 and the company had seen none of its money. These claims were thrown out of court but by this time Taleb was holed up in the Mauritanian embassy which refused to expel him. It also emerged from a variety of documents that Taleb was the Mauritanian community leader for the Sassandra *préfecture*.<sup>179</sup>

As well as using legal means to delay and discourage DANAFCO and three other companies present at some or all of the hearings (SACI were owed 16 million, Blohorn three million, Trituraf four million), Taleb also used some illegal ones, mostly alleged bribery of various officials.<sup>180</sup>

Taleb eventually emerged from the embassy and was condemned to go to prison for two years on the bounced cheques but was released in September 1988 when the President announced a general amnesty to celebrate the first papal visit. He promptly fled the country and died in Mauritania the next year.<sup>181</sup> DANAFCO, meanwhile, after over three years of legal proceedings finally saw some of their money when the court awarded the company possession of Taleb's four shops and all the merchandise in them. After legal and other related expenses had been deducted, the company had recuperated just 700,000 of the

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<sup>178</sup> DSA: legal document, 'Extraits des minutes du Greffe du Tribunal de Première Instance d'Abidjan' (April 23 1986); Fieldwork: discussions; Interview: Zamble.

<sup>179</sup> DSA: file, 'Dossier sur l'affaire Taleb'; Personal experience: discussions with Zamble (summer 1986).

<sup>180</sup> Personal experience: discussions with Zamble in 1985 and 1986; Interview: Zamble.

<sup>181</sup> Interview: Zamble; EIU, Report, (No.4, 1990), p.16.

eleven million it was owed. None of the other companies received anything.<sup>182</sup>

Whilst Taleb allegedly used bribery, the Lebanese community have long supported the political aspirations of Ivorians by financial payments which could be interpreted as either donations or bribery. Prior to the emergence of the PDCI, Lebanese traders had paid "some form of informal tribute to local notabilities in exchange for the privilege of buying and selling goods in the area."<sup>183</sup> As the reality of independence became apparent, they increasingly switched their financing to local party chiefs as a means of insuring their continued presence in the territory and these contributions continued into the 1980s.<sup>184</sup> However, it does not appear that they reached the same level of involvement as did some of those in Senegal.<sup>185</sup>

Some would call the above bribery, in which case many Europeans would also have less than clean hands. Winder referred to bribery<sup>186</sup> (though of whom is not clear) and an official at the patents office in Abidjan, in explaining why the records were not accurate, said that Lebanese bribery of political figures gave them protection against paying for the proper commercial licenses.<sup>187</sup> In Senegal, Cruise O'Brien asserted that "the system of payoff by the Lebanese operates up to the highest level in public life".<sup>188</sup> It is also known that many Lebanese gained political favours through the handling of some members of the elite's financial

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<sup>182</sup> Interview: Zamble; Fieldwork: discussions with Zamble. See also DSA: file, 'Taleb'.

<sup>183</sup> Zolberg, One Party, p.118.

<sup>184</sup> Ibid; M.A.Cohen, Urban Policy and Political Conflict in Africa (University of Chicago Press, Chicago, 1974), pp.128-129; Personal experience: discussions with Lebanese traders, e.g. Adnan Ajani of Lakota (1985).

<sup>185</sup> S.Boumedouha, 'Adjustment to West African Realities: the Lebanese in Senegal', Africa, 60, 4 (1990), p.544.

<sup>186</sup> Winder, 'Lebanese', p.314.

<sup>187</sup> Fieldwork: discussion with patents office official (July 1990). The individual concerned not surprisingly declined to give his name.

<sup>188</sup> R.Cruise O'Brien, 'Protection', p.112.

affairs<sup>189</sup> but, as an article in Fraternité Matin pointed out, "*s'il y a eu des corrupteurs libanais c'est parce qu'il a bien existé des << corrompus>> ou des corruptibles nationaux*".<sup>190</sup> Further, whilst the Lebanese were "in percentage terms relative to the rest of the population, at the top of the list of convictions for economic fraud", the amounts embezzled showed "this practice turns out to be as much a privilege of the French and the Ivorians as of the Lebanese".<sup>191</sup>

In part because of their reluctance to integrate socially, the Lebanese were mistrusted by many Ivorians although at times "*Ils n'hésitent pas à apporter leur soutien matérielle aux grandes causes nationales*".<sup>192</sup> Their economic activities also gave rise to suspicions about their professional morality<sup>193</sup> and their at times flamboyant lifestyle was also disliked<sup>194</sup> although members of the Ivorian elite were as guilty if not more so of such behaviour.<sup>195</sup> Although Lebanese communities were closely knit<sup>196</sup> and they "*vivent en communauté fermée qui ne songe qu'à l'intérêt de ses membres*"<sup>197</sup> they "appear to be un-assimilated, closed, isolated social groups."<sup>198</sup> Thus it is misleading to judge Lebanese integration into Ivorian life by the number of inter-racial marriages. These were rare,<sup>199</sup> but so were marriages outside of the religious group.<sup>200</sup> As Boumedouha pointed out, "even in Lebanon, it is quite unusual for a Shi'a, a Sunni, a Maronite, or a

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189 Personal experience: discussions with Peter Toxvaerd, formerly Danish ambassador to Ivory Coast (1984-85). This source was well acquainted with a number of individuals behind the senior Ministers.

190 N.Yao, 'Libanais d'Afrique', Fraternité Matin (July 5 1990), back page.

191 Bigo, 'Network', p.525.

192 Kone, 'Pouvoir', p.15.

193 Binet, 'Libanais', p.261.

194 Bigo, 'Network', pp.523-524.

195 Personal experience: observation; Fieldwork: observation.

196 White and Gleave, Economic Geography, p.203.

197 Kone, 'Pouvoir', p.14.

198 Winder, 'Lebanese', p.317.

199 But not unheard of. One Lebanese in Bondoukou, Jouhair Talal, has long been married to a Baoule. Personal experience: observation.

200 Kone, 'Pouvoir', p.15.

Greek Orthodox to marry someone from outside their religious group".<sup>201</sup>

Despite the many longstanding criticisms of the Lebanese, it was the Mauritanian community which appeared to be the least popular with Ivorians and other NSE traders.<sup>202</sup> Further, some salesmen's practice of 'unofficial credits' described above was not usually extended to Mauritians.<sup>203</sup> As well their reputation for bad debts, Mauritians were disliked by some Ivorians because they perceived them to be racist. Salesmen and market traders claimed that they talked down to them because they were darker skinned and cited the fact that, in Mauritania, most blacks were the slaves of the fairer skinned peoples (effectively legally so until around 1980).<sup>204</sup> The impression was doubtless compounded by the closed social environment in which Mauritians moved. Given, in addition, the resentment at their economic success at a time when many Ivorians were being made redundant, it was perhaps not surprising when, in 1981, they joined the list of foreign nationals who have been subjected to Ivorian racial attacks.<sup>205</sup>

Whatever the truth about allegations of economic and political corruption, the reality about the Lebanese and other foreign communities in Ivory Coast is probably no worse than that about the Ivorian elite or European interests and individuals. European interests throughout West Africa constantly accused the Lebanese of a wide range of crimes, of being exploitive and corrupt, but these accusations could equally well be levelled at those who

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<sup>201</sup> Boumedouha, 'Adjustment', p.546. See also Gilmour, *Fractured*, pp.13-14.

<sup>202</sup> Personal experience: observation; Fieldwork: observation.

<sup>203</sup> Personal experience: discussions with salesmen: observation. On at least three occasions during 1984 on trips to San Pedro and Abengourou, I witnessed this problem. The salesman had deposited goods earlier but on returning to cash in, the trader who had taken receipt of the goods was not there. The trader now in charge would deny all knowledge of the goods, saying that payment would have to wait until the original trader returned and, further, he had no idea when that would be. It was always the same story. Strangely enough, if the salesman said he would return at, say, ten in the morning but instead arrived at nine, the original trader would almost always be there.

<sup>204</sup> Fieldwork: discussions with traders and salesmen.

<sup>205</sup> EIU, *Cote d'Ivoire Country Profile 1990-91*, p.4.

made them.<sup>206</sup> As one individual explained in declining to complete a fieldwork questionnaire, the Lebanese have rarely been given a fair hearing.<sup>207</sup>

### 3.6 IVORIANS AS NSE TRADERS, 1956-1990

The emphasis of this chapter has been on foreign rather than Ivorian NSE traders as they have constituted the large majority store owners throughout the period. Many of the pre-colonial and colonial factors which kept Ivorians from trade continued to do so after 1956. Akeredolu-Ale's model attributing the success of the Ijebu in Nigerian internal trade to geographical location, economic necessity and cumulative advantages again helps to explain the failure of Ivorians to expand their interests in NSE store ownership.<sup>208</sup>

Geographical location has been important because of the number of migrants who have sought areas richer than their own i.e. peoples from the Sahelic countries. This has meant more competition for those Ivorians who have gone into trade and could well have discouraged others from doing so for the same reason.

More important was economic necessity. With a booming economy from the 1950s to the end of the 1980s, Ivorians, compared to many other nationals in their own country, have been almost spoilt in availability of steady income jobs compared to neighbouring countries. There thus has been less of a need for Ivorians to try their hand at an occupation which was not only regarded as insecure but 'beneath' them. At the same time, the economic boom proved to be a magnet for foreign Africans, most notably the Nigerians in the 1950s and 1960s and the

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<sup>206</sup> R.Cruise O'Brien, 'Protection', pp.95-115 ; Bigo, 'Network', p.525.

<sup>207</sup> A Shi'ite owner of an alimentation in Gagnoa. We had a long conversation on people writing about the Lebanese and he was evidently well read. Despite his hostility towards much of the academic and non-academic literature, he was unfailingly polite throughout, as were the vast majority of Lebanese I encountered.

<sup>208</sup> Akeredolu-Ale, 'Sociohistorical', pp.347-364.

Mauritanians since then. This is where the third point comes into play, cumulative advantages.

The early chapters showed how the Dioula exploited their trading knowledge and contacts, greatly facilitated by a common faith, Islam. This is an advantage they have maintained over other Ivoirians. The Mauritanians also had a common religion (though there is no suggestion that it helped them with the Dioula) and a long history of trading which enabled them to become exceptionally well organised and supportive of each other. Ivoirians had neither the advantage of a close knit, financially secure community or the extensive trading experience which was probably needed to acquire the former.

### 3.7 CONCLUSION

Whilst the weaknesses of NSE sector traders have been highlighted by many sources, the strengths have generally been given rather less prominence. The success of the Lebanese is perhaps best illustrated by the way in which they out thought and out manoeuvred the European trading companies as well as independent European traders and Africans. In short, no other group displayed the same level of commercial ability in a constantly changing environment. The belief in the early 1960s that the Lebanese would shortly give way to a new African commercial class<sup>209</sup> failed to materialise.

Many African traders also managed to survive, some even to prosper. Mauritanians provide a clear example of how commercially organised communities provided a range of support systems which benefited the community as a whole. New traders benefited from the experience and financial assistance of their elders. Established traders benefited from having apprentices as cheap labour and probably gained from assisting in financial transactions on behalf of new store owners. Most of these benefits

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<sup>209</sup> Winder, 'Lebanese', p.310.

appear to have been available to the other main organised group, the Dioula.

This is not to say that the NSE sector has no weaknesses for it clearly did. Family obligations, lack of financial resources, illiteracy and poor accounting methods worked against these traders. Further, some traders appeared to have little or no support network. This seems especially true of non-Dioula Ivorians whose participation continued to be undermined by the cumulative advantages of other traders and, until at least the early 1980s, by opportunities available in other areas of the national economy. But, as the following chapter shows, NSE traders had a better understanding than their WSE counterparts of multiple store ownership, the amount and range of goods to stock, the potential of a store in a given location and the ability make changes in rapidly changing circumstances.



## CHAPTER 4

### THE TRANSFER OF WESTERN DISTRIBUTION TECHNIQUES TO IVORY COAST: SUCCESSES AND FAILURES

This chapter examines the fortunes of stores in the Western Style Enterprises (WSE) sector, contrasting them with those in the Non-Western Style Enterprises (NSE) sector. The introduction of western distribution techniques occurred in two ways. The first was through western-style and mostly western-owned enterprises, these including family grocery stores, supermarkets, and trading company wholesale and retail chains. The second concerned government and French-backed programmes to transfer western methods to Ivorians. These successive attempts at introducing nationwide distribution networks have never been analysed from an economic perspective.<sup>1</sup>

Although numerically only a small percentage of total stores, multiple retail chains received the lion's share of attention and investment from both western enterprises and the state. Western interests doubtless hoped to capture the lion's share of the retail and wholesale sectors and the state joined them in believing that modern distribution technologies would increase efficiency in the channels of distribution. They also hoped to achieve price conformity throughout the country and to bring a wide range of goods to a large proportion of the population as a large internal market was essential if the Ivorian industrialisation strategy was to be sustained. Further, the state saw the chain store operations as a means of increasing its own participation in internal distribution. This inevitably brought state and western interests into conflict.

The rest of the chapter is organised in four main sections. The first looks briefly at the characteristics and history of the different types of stores which have been classified as WSEs. The second

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<sup>1</sup> Though they have been from a political perspective. See C.Boone, 'Commerce in Cote d'Ivoire: Ivorianisation without Ivorian Traders', IMAS, 31, 1 (1993), pp.67-92.

section analyses the strengths and achievements of chain stores and the third their weaknesses, both through comparisons with stores in the NSE sector and independent WSE outlets. The fourth section looks at the latest attempt to boost Ivorian participation in the distributive trades following the failure of the state supervised chain stores. Finally, the principal findings and their wider implications are summarised and assessed in the conclusion.

#### 4.1 ORIGINS AND TYPES OF WSE STORES

Five types of WSE retail store can be identified during the period 1956-1990: small retail chains, grocery chains, independent grocery stores, supermarkets and wholesale chains. All of these stores, either consciously or otherwise, imitated the trading practices and theories prevalent in North America and Europe. Most, but not all, were characterised by most of the following: formally acquired skills, use of bookkeeping methods, difficult entry, corporate ownership, large scale of operation, use of cash tills and other retail technology, tidy physical appearance, regular salaried employees and reliance on overseas financial and technical resources.

The most numerous WSE stores for much of the period were the small retail chains, the origins of which can be traced in America to such pioneers as H.B.Claflin & Company in the 1860s, originally a wholesaler, and the 'Economy stores' of the Great Atlantic and Pacific Tea Company (A&P) started in 1913.<sup>2</sup> Much like the Société Commerciale de l'Ouest Africain (SCOA), retail chains which existed in the early to middle nineteenth century were usually "wholesale-retail vertically integrated partnerships spawned by the former's need to distribute imported goods".<sup>3</sup> Claflin began to acquire retail stores in the 1860s and 1870s<sup>4</sup> just as SCOA did in

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<sup>2</sup> R.J.Bullock, 'A History of the Great Atlantic and Pacific Tea Company Since 1878', *Harvard Business Review*, 12, 1 (1933), pp.59-69; S.C.Hollander and G.S.Omura, 'Chain Store Developments and Their Political, Strategic, and Social Interdependencies', *Journal of Retailing*, 65, 3 (1989), pp.304-311.

<sup>3</sup> Hollander and Omura, 'Chain', p.304.

<sup>4</sup> *Ibid.*

the late 1950s and early 1960s with its *Chaine Avion* in Ivory Coast.<sup>5</sup> A&P stores aimed to distribute goods into neighbourhoods at low, uniform prices but their stores were smaller than other grocery outlets and were aimed at the poorer consumer. They also had a low outreach because of their size (run by a single manager plus perhaps a helper), and the local low income consumers they were aimed at but the 1930s depression severely curtailed the chain's growth.<sup>6</sup> Multiple retailers grew rapidly in France and other European countries during the period 1890-1914 with most specialising in food and tobacco<sup>7</sup> whilst stores selling a variety of types of products at low prices evolved later, in the 1920s and 1930s.<sup>8</sup> An important factor in the growth of chain stores was the apparent demand for standard quality low priced goods,<sup>9</sup> factors which were perceived to have been required in early 1960s Ivory Coast. Thus the small retail chain stores were aimed primarily at low income consumers, much like A&P's economy stores.

As Table 13 shows, there were four retail chain groups in the 1960s. *Chaine Avion* was the first to be set up, in 1956, and the last to collapse, in 1984. When SCOA's *Avion* began operations it took over the parent company's old trading post buildings (closed in 1955), in many instances using the same personnel as well.<sup>10</sup> Undoubtedly, as the existence of buildings in many towns helped to keep costs down,<sup>11</sup> so too did the availability of at least partially trained staff. These were probably major factors in determining the initial rapid growth. SCOA instituted a number of changes during the following years but eventually closed the chain in 1984.<sup>12</sup> Stores were run by managers or *gerants* and

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<sup>5</sup> D.Bollinger, Le marketing en Afrique, tome 1: la Cote d'Ivoire (CEDA, Abidjan, 1977), p.130; A-L.Bonnefonds, 'La transformation du commerce de traite en Cote d'Ivoire depuis la dernier guerre mondiale et l'indépendance', Cahiers d'Outre Mer, 21, 84 (Bordeux, 1968), p.403.

<sup>6</sup> Hollander and Omura, 'Chain', p.307; Bullock, 'Tea', pp.65-67.

<sup>7</sup> J.B.Jefferys and D.Knee, Retailing in Europe (Macmillan, 1962), p.53.

<sup>8</sup> Ibid., pp.54-55.

<sup>9</sup> Ibid., p.52; Bullock, 'Tea', pp.65-66.

<sup>10</sup> Ibid., p.403; Bollinger, Marketing, p.130.

<sup>11</sup> Bollinger, Marketing, p.130.

<sup>12</sup> R.E.Grupp, 'Transposition en Afrique noire de methodes commerciales modernes: l'entreprise succursaliste "Chaine Avion" en Cote d'Ivoire.' In Laboratoires 'Connaissance du tiers monde', Entreprises et entrepreneurs

were owned and supplied by the company, and this was also true of the Chaîne Elephant chain which was owned by Commerce Africain, another long established trading company.<sup>13</sup> Elephant was closed in 1969 when Commerce Africain was taken over by Peyrissac.<sup>14</sup>

SCOA, along with the state, also had an interest in the Société ivoirienne de distribution économique (SIDEKO) which was a voluntary chain (stores owned by the traders).<sup>15</sup> SIDEKO had three main components, two active and one passive. The passive one was the state which held 46.33% of SIDEKO's capital but did not have any say in the running of the organisation.<sup>16</sup> The state's role was thus limited to a supportive one in that it helped to finance the initiative.<sup>17</sup> Much of the finance came from the managing company UNACI<sup>18</sup> which held 23.67% of the capital.<sup>19</sup> SCOA, the other active component of the group, purchased the goods on behalf of SIDEKO.<sup>20</sup> This voluntary chain declined fairly rapidly in the late 1960s for reasons not entirely clear. Boone stated that its problems "appear to have been in part because of conflicts with its suppliers"<sup>21</sup> while IDET-CEGOS stated "*il ne lui a pas été possible de faire respecter aux affiliés le minimum de discipline*

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en Afrique xix et xx siècles: tome 2 (L'Harmattan, Paris, 1983), pp.353-367; E.Assidon, Le commerce captif (L'Harmattan, Paris, 1987), p.111.

<sup>13</sup> Bonnefonds, 'Traite', pp.403-404; ANCI, 1457/X-54-14: Fiches de Renseignement (1936).

<sup>14</sup> Chaîne Elephant is in fact only discussed briefly in Bonnefonds, 'Traite', p.404, and mentioned in just one sentence in IDET-CEGOS, 'Elements d'une politique de distribution' (Documents internes travaux préparatoires aux plan 1971-75, 1968), p.6; A.Diambra-Hauhouot, 'Le commerce de détail dans l'agglomération d'Abidjan' (IGT, Université d'Abidjan), p.6.

<sup>15</sup> IDET-CEGOS, 'La distribution en Cote d'Ivoire', (Ministère du Plan, Abidjan, n.d. circa 1963), pp.60-68.

<sup>16</sup> J.Dutheil de la Rochere, L'état et le développement économique de la Cote d'Ivoire, (Pedone, Paris, 1976), p.369.

<sup>17</sup> Bonnefonds, 'Traite', p.401.

<sup>18</sup> Assidon, Captif, p.108. The meaning of this acronym is not given but, at a guess, it probably stands for *Union National des Actionnaires de Cote d'Ivoire*.

<sup>19</sup> Calculated from Assidon, Captif, p.108 and Dutheil de la Rochere, Etat, p.369.

<sup>20</sup> IDET-CEGOS, 'Distribution', p.66; Assidon, Captif, p.108.

<sup>21</sup> Boone, 'Commerce', p.76.

*nécessaire au bon fonctionnement d'un groupement d'achats.*"<sup>22</sup> Consequently, SIDECO had switched to concentrating on being an importer and wholesaler by 1968.<sup>23</sup> Much the same reason led to the demise of the other voluntary chain by 1969, the Système d'Achat et de Vente Economique (SAVE), a co-operative founded in 1960<sup>24</sup> and supplied by yet another long established trading company, the Compagnie Francaise de l'Afrique Occidentale (CFAO).<sup>25</sup>

Finally, the state initiative, the Programme d'Action Commerciale (PAC), was started in 1970 with the aim of increasing the number of Ivorians in trade.<sup>26</sup> It arose directly out of the recommendations by the French research company IDET-CEGOS in preparatory documents for the 1971-75 five year plan.<sup>27</sup> Chaine PAC was a voluntary chain with stores held by the trader on a franchise basis until paid for.<sup>28</sup> Its members drew neither salary nor commission, thus operating financially like any other independent trader.<sup>29</sup> The projected target of 800 stores by the end of 1975 was never reached<sup>30</sup> and by 1980 the state was no longer prepared to absorb the financial losses the initiative incurred.<sup>31</sup>

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<sup>22</sup> IDET-CEGOS, 'Elements', p.4.

<sup>23</sup> Ibid.

<sup>24</sup> B.Campbell, 'The Social, Political, and Economic Consequences of French Private Investment in the Ivory Coast' (Ph.D., University of Sussex, Brighton, 1973), p.318.

<sup>25</sup> Ibid, p.3; Bonnefonds, 'Traite', p.405; Boone, 'Commerce', p.78. The date of SAVE's final demise is not given in any of these sources but it was not 1960 as stated by Grupp, 'Avion', p.358.

<sup>26</sup> RCI, 'Le Programme d'Action Commerciale', (Ministère de l'Economie et des Finances, Abidjan, n.d. circa 1971), p.2.

<sup>27</sup> IDET-CEGOS, 'Elements'; Dutheil de la Rochere, Etat, p.369; G.Delaporte, 'La politique fruitière et légumière de la Cote d'Ivoire', Marches Tropicaux, 1639 (8 avril 1977).

<sup>28</sup> Bollinger, Marketing, p.134.

<sup>29</sup> RCI, 'Action', p.8.

<sup>30</sup> Ibid, p.12 ; Bollinger, Marketing, p.135 ; RCI, La Cote d'Ivoire en chiffres 1980-81.

<sup>31</sup> Grupp, 'Avion', p.355.

TABLE 13: NUMBER OF SMALL RETAIL CHAIN AND GROCERY CHAIN STORES

| YEAR | SCOA       | ELEPHANT | SAVE     | SIDECO  | PAC        | JAG  | SACI    |
|------|------------|----------|----------|---------|------------|------|---------|
| 1957 | (90)       |          |          |         |            |      |         |
| 1963 | (117)      |          | (50) +   |         |            |      |         |
| 1964 |            |          | (89)     | 99*     |            |      |         |
| 1965 | 150*       | (30)     |          | 96*     |            |      |         |
| 1966 |            |          | (100)    |         |            |      |         |
| 1967 | 159*       |          | (48)     |         |            |      |         |
| 1968 | 162*       |          | (30) +/- | 40* +/- |            | [15] |         |
| 1969 |            |          | (22)     |         |            |      |         |
| 1970 | (139) [32] |          |          |         | (17)       |      |         |
| 1971 |            |          |          |         | (67) [16]  |      |         |
| 1972 | 183*       |          |          |         | (193)      |      |         |
| 1973 | (134) [60] |          |          |         | (232)      |      | [7]     |
| 1974 |            |          |          |         | [82]       |      |         |
| 1976 | (141) [66] |          |          |         | (241) [77] |      | [15]    |
| 1978 |            |          |          |         | (250)      |      |         |
| 1980 | (132) [95] |          |          |         | (195)      |      |         |
| 1982 | 200*       |          |          |         |            |      |         |
| 1985 | 144*       |          |          |         |            |      | [5] +/- |
| 1987 | (105) +/-  |          |          |         |            |      |         |
| 1990 | [10]       |          |          |         |            |      |         |

KEY: ( ) = Small retail only, [ ] = Grocery only, \* = both, +/- = circa, + = at least.  
 Sources: E.Assidon, *Le commerce captif* (L'Harmattan, Paris, 1987), p.96; R.E.Grupp, 'Transposition en Afrique noire de methodes commerciales modernes: l'entreprise succursaliste "Chaine Avion" en Cote d'Ivoire'. In Laboratoires "Connaissance du tiers monde", *Entreprises et entrepreneurs en Afrique xix et xx siecles*, tome 2 (L'Harmattan, Paris, 1983), p.354; D. Bollinger, *Le marketing en Afrique. tome 1: La Cote d'Ivoire* (NEA, Abidjan, 1977), pp.130, 133-134; IDET-CEGOS, 'Eléments d'un politique de distribution' (Documents internes au travaux préparatoires aux plan 1971-75, Abidjan, 1968), p.2; A.L.Bonnefonds, 'La transformation du commerce de traite en Cote d'Ivoire depuis la dernière guerre mondiale et l'indépendance', *Cahiers d'Outre Mer*, 21, 84 (1968), pp.400-405; C.Coquery-Vidrovitch, 'L'impact des intérêts coloniaux SCOA et CFAO dans l'ouest africain', *Journal of African History*, 16, 4 (1975), p.617; SEDES, 'Région de sud-est: étude socio-économique' (Ministère du Plan, Abidjan, 1967); IDET-CEGOS, 'La distribution en Cote d'Ivoire' (Ministère du Plan, Abidjan, n.d., circa 1963), p.67.

With the exception of Elephant and SAVE, the small retail chains also operated grocery or mini-supermarket stores which targeted African customers in the middle to upper income groups in the main urban centres (see Table 13). These outlets were run along the same principles as the smaller stores except that they stocked

more items and had facilities for frozen foods.<sup>32</sup> In the case of PAC, the large grocery stores or *superettes* only were run directly from headquarters.<sup>33</sup> In 1973, the three Cocody outlets accounted for ten percent of the total turnover of the entire PAC group.<sup>34</sup> In addition to the aforementioned groups, two other companies also operated grocery chains. Etablissements Jean Abile-Gale (JAG), whose principal activity was coffee processing, sold its SAMA outlets to PAC in 1976.<sup>35</sup> Société Africain de Commerce et d'Industrie (SACI), which stocked more goods than the others,<sup>36</sup> gradually declined until declaring bankruptcy in 1990.<sup>37</sup>

With the demise of Avion, SCOA launched a small chain of grocery stores called Jok in 1983.<sup>38</sup> These were bigger than the Avion grocery stores and, according to a report in *African Business*, "the creation of neighbourhood superettes . . . met with unanticipated success in Ivory Coast."<sup>39</sup> The Jok stores were easily recognised by their bright exteriors<sup>40</sup> and in January 1985 had a combined turnover of 25 million CFA per month.<sup>41</sup> Nonetheless, they were supplanted by the min-Score a few years later which took over some of the old Jok buildings.<sup>42</sup> They were closed when SCOA ceased all retailing operations in Ivory Coast in 1991.<sup>43</sup>

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<sup>32</sup> A.Maurel, 'Les sociétés de distribution alimentaire en Cote d'Ivoire', *Africa* [now *Africa International*], 68, (1974), p.43.

<sup>33</sup> RCI, *Cote d'Ivoire: vingt ans*, (Fraternité-Hebdo, Abidjan, 1980). Figure includes *libre service* stores but not *superettes*.

<sup>34</sup> Maurel, 'Alimentaire', p.43.

<sup>35</sup> Bollinger, *Marketing*, p.135.

<sup>36</sup> Maurel, 'Alimentaire', p.41.

<sup>37</sup> DSA: internal report, J.Ayirebi, 'Survey of Distribution Outlets, Abidjan' (1983); Interview: Mr. Frederick Attoh, DANAFCO General Manager (Abidjan, September 1990).

<sup>38</sup> Personal experience: observation. All dates for personal experience are for all of the periods 1983-85 and 1986 unless otherwise indicated.

<sup>39</sup> H.French, 'SCOA Aims for Renewed Profits', *African Business*, 72 (August 1984).

<sup>40</sup> Personal experience: observation.

<sup>41</sup> DSA: handwritten list of JOK outlets (1985).

<sup>42</sup> Fieldwork: discussion with Mme R.Theze, Chargés des Supermarchés at DANAFCO, previously at Abinader. All dates for fieldwork are for all of the period July-December 1990 unless otherwise indicated.

<sup>43</sup> WAHA: telex sent to Wander, Berne (February 1992).

Of the WSE retail stores, independent grocery outlets are the least easily embraced by the above definition but nonetheless are clearly within the parameters. In the 1950s to the early 1960s most were probably French owned but the numbers are unclear. In 1962 there were around 250 French owned establishments but this figure appears to include specialist stores, wholesalers, timber merchants, repair shops and gas stations amongst others.<sup>44</sup> By the early 1970s most independent grocery stores were probably Lebanese owned<sup>45</sup> but again there are no figures. By the mid 1980s their dominance, especially in the interior, was very apparent though some in Abidjan were owned by Ivorians, mainly Baoule and Agni in Yopougon, Treichville, Marcory, the Zones and Cocody-Riviera-Blokoso. Each town in the interior with a population over 10,000 had between one and four independent grocery stores around this time. It would be possible to estimate the number of independent grocery stores at around 130 in Abidjan and 140 in the interior for the period 1984-85.<sup>46</sup> Many have existed in the same location for ten or more years and continued to do so in 1990, by which time they constituted easily the majority of all grocery stores.<sup>47</sup>

The final type of WSE retail stores are supermarkets. Ever since the appearance of Printania in Ivory Coast in 1956,<sup>48</sup> supermarkets have opened with surprising regularity even into

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<sup>44</sup> SEDES, 'Région du sud-est: étude socio-économique' (Ministère du Plan, Abidjan, 1967); SEDES, 'Région de Korhogo. Etude de développement socio-économique.' (Ministère du Plan, Abidjan, 1965); SEC-OBM, 'Région de Daloa-Gagnoa. Etude socio-économique' (Ministère du Plan, Abidjan, n.d. circa 1964); BCCEER, 'Etude régional de Bouake (février 1962 - décembre 1963)' (Ministère du Plan, Abidjan, 1965); IDET-CEGOS, 'Région Odienné - Seguela' (Ministère du Plan, Abidjan, 1968); BDPA, 'Etude général de la région de Man' (Ministère du Plan, Abidjan, 1978).

<sup>45</sup> Interview: Mr. Bernadin Doh Gilles, Salesman at Blohorn and DANAFCO (Abidjan, 2nd. interview, October 2 1990).

<sup>46</sup> DSA: internal reports, L.Bosteen, 'Survey of Distribution Outlets and Ethnic/National Groups, Abidjan Town' and 'Survey of Distribution Outlets and Ethnic/National Groups, Bush Sector of Abidjan' (both 1985); internal reports, J.S.Ayirebi, 'Survey of Distribution Outlets, Bouake' (March 1984) and 'Abidjan'; Personal experience: I visited most of these towns.

<sup>47</sup> Personal experience: discussions with Lebanese traders; Fieldwork: observation: discussions with Lebanese traders.

<sup>48</sup> CCCI, Bulletin Mensuel, 6,(1973), p.93.



the recession hit 1980s. Details of the various stores are given in Table 14 below.

TABLE 14: SUPERMARKETS IN IVORY COAST

| SUPERMARKET      | CONTROLLING GROUP | ORIGIN    | YEARS EXISTED | SIZE (m <sup>2</sup> ) | LOCATION   |
|------------------|-------------------|-----------|---------------|------------------------|------------|
| Printania        | SCOA              | French    | 1956-75 ?     |                        | Plateau    |
| Score 1          | SCOA              | French    | 1969-91       | 2000                   | Plateau    |
| Score 2          | SCOA              | French    | 1979          | 1,100                  | 2 Plateaux |
| Score Riviera    | SCOA              | French    | 1981-91       | 550                    | Riviera    |
| Score Koumassi   | SCOA              | French    | 1987-91       | 1,200                  | Koumassi   |
| Monoprix         | Lafayette         | French    | 1963?-83      | 1,188                  | Plateau    |
| Monoprix         | Lafayette         | French    | ?-1989?       |                        | Bouake     |
| Froid Industriel | Froid Industriel  | French    | ?-1983        | 680                    | Plateau    |
| Froid Industriel | Froid Industriel  | French    | 1967-76       |                        | Cocody     |
| Froid Industriel | Froid Industriel  | French    | 1969-?        |                        | Koumassi   |
| Trade Center     | Trade Center      | Lebanese  | since 1982    | 600                    | Plateau    |
| Froid Industriel | Trade Center      | Lebanese  | since 1983    | 680                    | Plateau    |
| Autoroute        | Trade Center      | Lebanese  | since 1986?   | 1,000                  | Zone 4     |
| SM Marcory       | Trade Center      | Lebanese  | since 1986?   |                        | Marcory    |
| Nour Al Hayat    | PROSUMA           | Pakistani | since 1967    | 800                    | Plateau    |
| Champion         | PROSUMA           | Pakistani | since 1985    | 600                    | Cocody     |
| Super Hayat      | PROSUMA           | Pakistani | since 1987    | 1,100                  | Zone 4     |
| Azar & Salame    |                   | Lebanese  | since ?       | 365                    | Plateau    |
| Super PAC        | PAC               | Ivorian   | 1975?-80?     | 500                    | Cocody     |
| Prima            | SODICO-CI         | various   | 1990-91       | 2,500                  | Zone 4     |
| Julien           | SODICO-CI         | various   | 1990?-91?     |                        | 2 Plateaux |
| SM Koumassi      |                   | Lebanese  | ?-1987        | 1,200                  | Koumassi   |

Sources: CCCI, Bulletin Mensuel, 6 (juin 1973), p.93; A.Maurel, 'Les sociétés de distribution alimentaire en Cote d'Ivoire', Africa [now Africa International], 68 (1974), pp.43-45; Interview: Mr.Anthony, Score General Manager (November 1990); P.Paoli, Champion Supermarket Manager (November 1990); Assidon, Captif, pp.72, 102; WAHA: telex to Wander, Berne (February 1992); IDET-CEGOS, 'Distribution'; Bollinger, Marketing, pp.135-136; Personal experience: observation; Fieldwork: discussion with Frederick Attou, DANAFCO General Manager, (1990): observation; RCI, Répertoire des industries et activités de Cote d'Ivoire 1985-86 (Ministère du Plan, Abidjan, 1986); EIU, Cote d'Ivoire Country Report (No.1, 1990), pp.28-29.

The principal location of supermarkets has been Abidjan ever since 1956 as this was where the vast majority of high income consumers lived. Specifically, most of them have been on the Plateau which is the central business district. Only in the late 1970s did the pattern begin to change with many locating in new,

less crowded, areas: the largely industrial but also residential Zone 4, Cocody and Deux Plateau where many of the Ivorian elite and embassy staff lived and Marcory, sections of which were occupied by Europeans and high income Africans.<sup>49</sup>

Table 14 shows that two groups dominated the supermarket sector by the end of 1991, Société de Promotion de Supermarché (PROSUMA) and Trade Center. These have supplanted the Score and Froid Industriel groups as the principal owners of supermarkets. The Trade Center group, established in 1982 with 100% Lebanese capital,<sup>50</sup> has been the most ambitious and arguably the most successful of the supermarket groups in the 1980s, buying out Froid Industriel in 1983 and converting the Bijani Freres grocery stores into supermarkets.<sup>51</sup> PROSUMA, in addition to its three Abidjan supermarkets, also owned a grocery outlet in Bingerville.<sup>52</sup> The Prima store, rather grandly referred to as a hypermarket, was the last entrant into the supermarket stakes. At 2,500 m<sup>2</sup>, it was the largest retail outlet in West Africa and opened in February 1990 with the aim of promoting African products.<sup>53</sup> Despite this, a substantial quantity of the goods were of US origin (and often with the date expired) and the proportion of African goods appeared to be no higher than in any other supermarket.<sup>54</sup>

The final type of WSE traders are wholesalers, most of which were chains at either national or, less commonly, regional level. The origins of wholesale chains can be seen to stem from the factories and stores of the large trading companies. Mueller and Garoian noted that the general store in the US "embodied many of the

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<sup>49</sup> Interview: Mr. P.Paoli, Manager of the Champion Supermarket (Abidjan, November 1990); Bollinger, *Marketing*, pp.135-136; Maurel, 'Alimentaire', pp.43-45; SCIMPEX, M.Esmail, 'Rapport de la commission 9 "Grandes Surfaces" ' (May 28 1985); SCIMPEX, 'Commission grandes surfaces et superettes: reunion du 3-5-85'; Fieldwork: observation.

<sup>50</sup> RCI, *Répertoire des industries et activités de Cote d'Ivoire 1985-86* (Ministère du Plan, Abidjan, 1986).

<sup>51</sup> Personal experience: discussion with Theze; Fieldwork: discussion with Theze (December 1990).

<sup>52</sup> Fieldwork: discussion with Theze.

<sup>53</sup> EIU, *Cote d'Ivoire Country Report* (No.1, 1990), pp.28-29.

<sup>54</sup> Fieldwork: observation.

traditions of the trading posts from which it evolved",<sup>55</sup> the same path of evolution as Ivory Coast. Like the trading posts, general stores in the US and wholesale chains in Ivory Coast provided customer credit and service from a sales assistant as goods were generally behind the counter.<sup>56</sup> Table 15 below shows the principal companies which operated wholesale chains in the Ivory Coast interior as well as Abidjan.

TABLE 15: PRINCIPAL WHOLESALE CHAINS IN IVORY COAST

| CHAIN          | CONTROLLING GROUP | AREA OF OPERATION | DETAILS OF OUTLETS     | YEARS IN EXISTANCE  | % TURNOVER IN FOOD         |
|----------------|-------------------|-------------------|------------------------|---------------------|----------------------------|
| SIDECO         | SCOA (1979: 62%)  | national          | 15 (1973)              | 1961?-83            | 65% (1973)                 |
| General Import | CFAO              | national          | 15 (1973)              | til end 1980s       | 70% (1973)                 |
| SACI           | SACI              | national          | 16 (1973)              | ?-1990              | 80% (1973)                 |
| CFCI           | Unilever          | national          | 22 (1985) <sup>a</sup> | ?-1991 <sup>a</sup> | 60% (1985) <sup>a</sup>    |
| SOCOCE         | SOCOCE            | centre west       | 6 (1990)               | 1967-               |                            |
| CNCI           | CNCI              | north             | 10+ (1990)             | 1926-               | 30-35% (1990) <sup>b</sup> |
| IVODIS         | Unilever, SCOA    | national          |                        | 1986-91             | 20-25% (1990) <sup>c</sup> |

a: Interior general merchandise stores only.

b: processed foods only.

c: estimate based on Korhogo store.

Sources: Assidon, *Captif*, p.70; Maurel, 'Alimentaire', p.45; RCI, *Répertoire 1985-86*; Fieldwork: observation: discussions with Attoh, CNCI manager and IVODIS manager, Korhogo (November 1990); questionnaires (1990); DSA: unknown author, 'Entretien avec le Directeur Général et le Directeur Commercial de la Société CFCI ce matin à nos bureaux' (n.d., circa 1984); WAHA, telex to Wander.

Surprisingly little has been written about company-owned wholesale and semi-wholesale outlets for virtually the entire period under study and their numbers are thus difficult to establish. The situation is further complicated by the failure of the sources to distinguish between food and non-food stores and thus the precise activities of Compagnie Francaise de la Cote d'Ivoire

<sup>55</sup> W.F.Mueller and L.Garoian, *Change in the Market Structure of Grocery Retailing*, (University of Wisconsin Press, Madison, 1961), p.11.

<sup>56</sup> *Ibid*; Personal experience: observation; Fieldwork: observation: discussion with IVODIS manager in Korhogo (November 1990).

(CFCI), CFAO and SACI in the 1960s are something of a mystery.<sup>57</sup> However, it is evident that at least one of the three had a store which wholesaled processed foods in each of the major towns in the 1960s.<sup>58</sup> It may thus be reasonably assumed that they, along with the Lebanese, were the principal suppliers of processed foods to independent traders and thus performed an important function during the 1960s.

From the information available, it would appear that the European trading companies withdrew virtually all of their trading posts in the period immediately following independence but that some companies returned, in different forms, fairly soon after. Of the three main colonial companies (CFAO, CFCI and SCOA), CFCI appears to have been the most resistant to a complete withdrawal. Most of the sources stated that this company retained wholesale and semi-wholesale outlets in most regions.<sup>59</sup>

CFAO and SCOA, on the other hand, adopted different strategies from CFCI and each other. SCOA appears to have closed all of its trading posts<sup>60</sup> and opted, as illustrated above, for retailing through multiple chain stores. It also set up the wholesale group Ivoirienne de distribution et d'exportation (IDEX) but it appears not to have had many outlets.<sup>61</sup> CFAO also closed all of its trading posts but instituted the SAVE initiative<sup>62</sup> as well as the import and wholesale company General Import.<sup>63</sup>

In addition to the above three companies, there remained a number of smaller enterprises with wholesale and semi-wholesale stores, most of them located in Abidjan. In 1963 at least one of

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<sup>57</sup> Both IDET-CEGOS, 'Elements' and Bonnefonds, 'Traite' fail to even mention these companies.

<sup>58</sup> SEDES, 'Sud-est'; SEC-OBM, 'Daloa-Gagnoa'; SEDES, 'Korhogo'; BDPA, 'Man'; IDET-CEGOS, 'Odienné-Seguela'; BDPA, 'Etude de la région d'Odienné-Boundiali' (Ministère du Plan, Abidjan, n.d. circa 1963). See also Campbell, 'Investment', p.319.

<sup>59</sup> Ibid.

<sup>60</sup> Ibid; Assidon, *Captif*, pp.69-72.

<sup>61</sup> Maurel, 'Alimentaire', p.45.

<sup>62</sup> Assidon, *Captif*, p.70.

<sup>63</sup> Maurel, 'Alimentaire', p.45.

the commercial houses had wholesale stores or depots in the following towns: Dabou, Lahou, Tabou, Sassandra, Bingerville, Bassam, Alepe, Aboisso, Adiake, Agboville, Adzope, Abengourou, Agnibilekro, Bondoukou, Bouna, Bongouanou, Bokanda, M'Bahiakro, Dabakala, Katiola, Ferkessedougou, Bouake, Dimbokro, Toumodi, Tiassale, Divo, Lakota, Gagnoa, Soubre, Oume, Yamoussoukro, Sinfra, Issia, Guiglo, Duekoue, Toulepleu, Daloa, Bouafle, Tiebessou, Beoumi, Zuenoula, Vavoua, Man, Danane, Seguella, Mankono, Korhogo and Odienne.<sup>64</sup> The ten largest companies in 1966-67 owned 135 such stores and 70 warehouses<sup>65</sup> whilst in 1972-73 the seven largest companies had 104 wholesale and semi-wholesale outlets. However, some of these did not deal in processed foods.<sup>66</sup>

As far as the northern-based companies are concerned, these have also been ignored by most of the sources. Due to the fact that the sources on the north were based on information gathered no later than 1963,<sup>67</sup> the fate of all but one of these companies is not known. Only Commercial du Nord de Cote d'Ivoire (CNCI) still existed in 1990 as a supplier of processed foods to local traders<sup>68</sup> and it can only be assumed that the others gradually disappeared, failing to see out the 1960s and reach the boom years of the 1970s when their closure would have been more unlikely.

For the 1970s in the interior, one is thus left with the following wholesalers of processed foods in the WSE sector: CFCI, SACI, CNCI, General Import, IDEX, Société Commerciale de Centre Ouest (SOCOCE) and SIDECO. These were later joined by Ivoirien de distribution (IVODIS) gros (*gros* meaning wholesale). To this list must be added perhaps a dozen other names, the majority of which probably had no establishments outside Abidjan. All, except possibly SIDECO, operated in much the same way. They were

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<sup>64</sup> IDET-CEGOS, 'Distribution'.

<sup>65</sup> L.Fabiani, 'Circuits de distribution en Cote d'Ivoire', (Mémoire d'entrée, Centre des Hautes Etudes de l'Afrique et de l'Asie Modernes, Paris, 1967).

<sup>66</sup> CCCI, Bulletin, 6, p.92.

<sup>67</sup> IDET-CEGOS, 'Odienne-Seguella'; SEDES, 'Korhogo'; BDPA, 'Odienne-Boundiali'.

<sup>68</sup> Fieldwork: discussions with CNCI staff (November 1990); Interview: CNCI Director (Korhogo, November 20 1990).

centrally controlled with managers in each of the stores. Prices, goods stocked, frequency of deliveries to the stores, and even opening hours were uniform and determined by the head office in Abidjan which was also where their central depots were. None of the companies mentioned were involved in the promotion of the products they sold.<sup>69</sup>

TABLE 16: LOCATION OF CFCI STORES IN 1982, 1985 AND 1989, AND TURNOVER IN 1985.

| LOCATION       | STORES<br>1982 | STORES<br>1985 | TURNOVER 1985 | STORES<br>1989 |
|----------------|----------------|----------------|---------------|----------------|
| Abengourou     | 1              | 1              | large         | 1              |
| Agnibilekro    | 1              | 1              | small         | 1              |
| Bondoukou      | 1              | 1              | large         | 1              |
| Bongouanou     | 1              | 1              | medium        | 1              |
| Bouake         | 1              | 1              | very large    | 1              |
| Boundiali      | 0              | 1              | medium        | 1              |
| Dabakala       | 0              | 0              |               | 1              |
| Daloa          | 1              | 1              | large         | 1              |
| Danane         | 1              | 1              | large         | 0              |
| Daoukro        | 0              | 1              | large         | 0              |
| Dimbokro       | 1              | 1              | large         | 1              |
| Divo           | 1              | 1              | large         | 1              |
| Duekoue        | 1              | 1              | large         | 1              |
| Ferkessedougou | 0              | 1              | medium        | 1              |
| Gagnoa         | 1              | 1              | large         | 1              |
| Issia          | 0              | 0              |               | 1              |
| Korhogo        | 1              | 1              | large         | 1              |
| Man            | 1              | 1              | very large    | 1              |
| Odienne        | 1              | 1              | small         | 0              |
| San Pedro      | 0              | 1              | large         | 1              |
| Seguela        | 1              | 1              | large         | 1              |
| Soubre         | 0              | 1              | small         | 1              |
| Toumodi        | 1              | 1              | small         | 0              |
| Yamoussoukro   | 1              | 1              | medium        | 1              |

Sources: DSA: 'Entretien CFCI'; RCI, Annuaire officiel des abonnés au téléphone 1990 (Cote d'Ivoire) (Office National des Télécommunications, Abidjan, 1990); RCI, Répertoire 1982-83.

Of the three big trading companies in Ivory Coast during the colonial years, CFCI evolved into the most comprehensive

<sup>69</sup> IDET-CEGOS, 'Distribution', pp.16-41; Bollinger, Marketing, pp.129-130; Maurel, 'Alimentaire', p.45; CCCI, Bulletin, 6, p.92; Fabiani, 'Circuits'; Interview: Mr. Kobenan, Director of SCIMPEX (Abidjan, December 10 1990); Mr. Claude Assouan, Directeur d'Achats at CDCI (Abidjan, December 4 1990); DSA: memo, 'Entretien avec le Directeur Général et le Directeur Commercial de la Société CFCI ce matin à nos bureaux' (n.d., circa 1984).

wholesaler. The company possessed three main branches, these being textiles, construction materials and general merchandise.<sup>70</sup> Only 17% of CFCI's total 1973 turnover was in food products.<sup>71</sup> The locations of its general merchandise stores in 1982, 1985 and 1989 are given in the table above.

In Bondoukou in 1971 only 35% of general merchandise store turnover was in food (plus another 17% in drinks).<sup>72</sup> In 1985 60% of CFCI sales were in food and drinks. In 1985 there were 22 of these wholesale stores in the interior. Four of the stores were designated *entrepôts centraux*, these being in Abidjan, Gagnoa, Bouake and Abengourou.<sup>73</sup> The following two sections examine the successes and failures of these and other chain stores.

#### 4.2 STRENGTHS AND ACHIEVEMENTS OF CHAIN STORES

Chain stores had, in theory at least, six main strengths and achievements. Probably the most noticeable to the average Ivorian was that the small retail chains brought a wide range of goods within physical reach of a large number of consumers. Most of the retail chains had stores located in villages as well as towns throughout the country. Thus, for the first time, rural consumers especially were presented with a wide choice of merchandise without having to travel long distances. Table 17 gives some idea of how widespread the Avion and PAC stores were. The former brought many goods within reach of a large number of consumers through its stores located in villages and, until at least the mid 1960s, through its 'lorry shops' which travelled around the small villages.<sup>74</sup>

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<sup>70</sup> Fieldwork: observation.

<sup>71</sup> *Ibid.*

<sup>72</sup> SIGES, 'Etude régionale de la sous-préfecture de Bondoukou' (Ministère du Plan, Abidjan, 1971). Bondoukou is now a préfecture.

<sup>73</sup> DSA: memo, 'CFCI.

<sup>74</sup> Bollinger, *Marketing*, pp.133-134; IDET-CEGOS, 'Odienné-Seguela'.

TABLE 17: LOCATION OF PAC AND AVION STORES BY REGION IN OCTOBER 1976.

| REGION      | PAC                    | AVION                  | % OF POP<br>IN REGION | % OF<br>STORES |
|-------------|------------------------|------------------------|-----------------------|----------------|
| ABIDJAN     | 61                     | 56                     | 14                    | 26             |
| NORTH       | 17                     | 17 (Korhogo 3)         | 12                    | 7.5            |
| WEST        | 19 (Man 5)             | 15 (Man 3)             | 11                    | 7.5            |
| CENTRE WEST | 30 (Daloa 4, Gagnoa 4) | 25 (Daloa 3, Gagnoa 4) | 19                    | 12.5           |
| SOUTH WEST  | 13 (San Pedro 4)       | 15 (San Pedro 5)       | 4                     | 6.5            |
| CENTRE      | 37 (Bouake 15)         | 19 (Bouake 8)          | 20                    | 12.5           |
| EAST        | 16 (Abengourou 3)      | 11                     | 7                     | 6              |
| SOUTH EAST  | 48 (Bassam 3)          | 49 (Bassam 3, Dabou 3) | 13                    | 21.5           |
| TOTALS      | 241                    | 207                    | 100                   | 100            |

Sources: Bollinger, *Marketing*, pp.133-134; RCI, *Population de la Cote d'Ivoire 1975*, (Ministère de l'Economie, Abidjan, 1975), pp.52-57.

The range of goods these stores stocked was also impressive. The number of items sold in each Avion increased gradually over the years from 700 items in around 1963<sup>75</sup> to between 1,500 and 1,800 around 1969 of which half were described as *alimentation*.<sup>76</sup> The range of products SIDECO stocked was similar to Avion with 60% to 70% of turnover coming from sales of flour, salt, sugar, milk, wine, corrugated metal, cement, cooking oil, soap and beer.<sup>77</sup> PAC stocked some 450 lines at the beginning,<sup>78</sup> 800 in 1971,<sup>79</sup> 1,300 in 1973, and 2,000 by 1976.<sup>80</sup> The range of goods was the same in all outlets of the same size and was aimed at satisfying "*les besoins essentiels des consommateurs ivoiriens*".<sup>81</sup>

The second important achievement was the introduction of uniform prices throughout the country. If other retailers and wholesalers were to compete, they had to match chain store prices. Some 90% of goods sold by Avion and others had the same public retail price as those sold in Abidjan despite Avion's transport costs amounting to 4.5% of turnover in the early

<sup>75</sup> SEDES, 'Sud-est'.

<sup>76</sup> Diambra-Hauhouot, 'Agglomeration', p.6.

<sup>77</sup> IDET-CEGOS, 'Distribution', p.67.

<sup>78</sup> CCCI, *Bulletin*, 4 (avril 1972).

<sup>79</sup> RCI, 'Action', p.10.

<sup>80</sup> CCCI *Bulletin*, 6 (juin 1973), p.93.

<sup>81</sup> RCI, 'Action', p.10.



1970s.<sup>82</sup> Thus consumers in Odienne in the far north paid the same for a pack of biscuits as did those in Abidjan.

The third achievement was to introduce new Ivorian traders to bookkeeping and other forms of technical assistance and training as well as publicity and promotion. Training lasted six months in Avion's own school at the end of which prospective traders had to pass an exam and serve an apprenticeship.<sup>83</sup> PAC's Ecole de Commerce provided training for promoters, people new to trade, traders already owning a store, and salesmen, cashiers and warehouse keepers. Tuition was free upon acceptance for a course. Acceptance was conditional on Ivorian nationality, aged 21 to 35 and varying academic qualifications depending on the course.<sup>84</sup> Similarly, many Ivorians would have benefitted over the years from working in the wholesale chain stores.

SAVE traders received technical assistance from CFAO as well as money for investing in the enterprise (e.g. to help them finance purchases of goods)<sup>85</sup> whilst SCOA provided free technical assistance to traders who were members of SIDECO.<sup>86</sup> SCOA was also obliged to train four Ivorian SIDECO directors for three years. For the first 18 months, the four European managers directly ran operations with the Ivorians as observers whilst for the remaining period the Ivorians were responsible but could call on the Europeans for assistance at any time.<sup>87</sup> Finance was provided to traders who wished to join SIDECO to transform their stores into a more organised and 'presentable' (i.e. western looking) form.<sup>88</sup> They were also encouraged to have an accountant or

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<sup>82</sup> Ibid; SEDES, 'Sud-est'; Maurel, 'Alimentaire', p.41; IDET-CEGOS, 'Distribution', p.67.

<sup>83</sup> Interview: Mr. Nestor Kouassi Kouakou, former Chaine Avion Manager (Abidjan, August 20 and 21 1990); Maurel, 'Alimentaire', p.41; Bollinger, Marketing, p.131; Grupp, 'Avion', p.360.

<sup>84</sup> RCI, 'Action', p.6; Dutheil de la Rochere, Etat, p.371.

<sup>85</sup> Bonnefonds, 'Traite', p.405; Assidon, Captif, p.70.

<sup>86</sup> Fabiani, 'Circuits'; Bonnefonds, 'Traite', p.400.

<sup>87</sup> Bonnefonds, 'Traite', p.400.

<sup>88</sup> Ibid, p.67.

bookkeeper<sup>89</sup> and/or to compile sales statistics every month.<sup>90</sup> PAC traders were supervised by 17 assistants in 1971, each one responsible for between five and eight outlets. Each store was visited twice weekly during which accounts were checked, information from central office conveyed and any other necessary assistance rendered.<sup>91</sup> Traders were also encouraged (or it may have been compulsory) to have bank accounts.<sup>92</sup> For Avion regional inspectors were charged with monitoring and assisting the store operators. They were answerable to the two or three heads of sector who were retail experts from France. They in turn were answerable to and advised the senior management which determined such policies as range of products stocked and expenditure on technical assistance.<sup>93</sup>

Whilst Avion and PAC no longer exist as chains, many of the better located stores survived under independent management for ten or more years, despite declining incomes throughout this period.<sup>94</sup> How much this is due to the training they received as against their own individual skills and commercial instincts is impossible to measure but the fact that many continued to keep books might indicate that they at least found some aspects of it useful.

Efforts at promoting SIDECO products through in-store publicity were also made with promoters visiting different regions in turn.<sup>95</sup> PAC distributed 5,000 signs with the group's logo and all stores had a roughly similar exterior. In addition, the government newspaper Fraternité Matin carried an item saying "*Au service du consommateur* " every Monday and traders could participate in a weekly radio programme "*A l'heure du consommateur*".<sup>96</sup> This effectively gave them free publicity. Avion was also active in the

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<sup>89</sup> Fabiani, 'Circuits'.

<sup>90</sup> IDET-CEGOS, 'Distribution', p.67.

<sup>91</sup> Ibid.

<sup>92</sup> Bollinger, Marketing, p.134.

<sup>93</sup> Interview: Kouakou; Bonnefonds, 'Traite', p.403; Fabiani, 'Circuits'.

<sup>94</sup> Personal experience: observation; Fieldwork: observation: discussions with former PAC and Avion traders.

<sup>95</sup> IDET-CEGOS, 'Distribution', p.67.

<sup>96</sup> CCCI, Bulletin, 4.

promotion of the goods it sold. A Chain Avion magazine was published six times a year and was available free to clients, 95% of whom were Africans. It contained advertisements for products and educational and other articles as well as competitions.<sup>97</sup> Wholesale chains, on the other hand, do not seem to have ever advertised the products they sold as there is no mention of them having done so in any of the sources consulted for the thesis. CFCI confirmed this impression in 1990 when a senior director stated the company regarded publicity as the manufacturer's concern.<sup>98</sup>

The fourth achievement of the chain stores was that they provided a network of outlets for Ivorian manufacturers as well as imported produce. For Avion grocery and small retail chain stores the origin of the goods even in 1963 was, in terms of value in turnover, split evenly between imported and local.<sup>99</sup> Other chain stores such as SACI and CDCI also bought goods from local manufacturers<sup>100</sup> but larger stores tended to stock a higher proportion of imported items.<sup>101</sup>

The fifth achievement of WSE chain store companies was the employment of Ivorians in trade though, in practice, it would have been politically inadvisable for private companies to do otherwise for most positions. Each of the Avion retail store managers had to be an Ivorian national.<sup>102</sup> However, despite the nationality requirement, it appears that there were non-Ivorian managers. In 1970 for example, 25 of the 160 *gerants* were non-Ivorian and by around 1973 6% still did not meet the company's nationality criteria.<sup>103</sup> There is no available explanation for this rather strange departure from policy, the least implausible possibility being that they had been employees in the old trading posts. For PAC, increasing Ivorian participation in trade was the primary

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<sup>97</sup> Maurel, 'Alimentaire', p.39; Grupp, 'Avion', p.359.

<sup>98</sup> Interview: Assouan.

<sup>99</sup> SEDES, 'Sud-est'.

<sup>100</sup> Fieldwork: discussion with SACI store manager, Plateau (1990); Interview: CNCI Director: Assouan.

<sup>101</sup> Maurel, 'Alimentaire', p.43.

<sup>102</sup> Bollinger, Marketing, p.131.

<sup>103</sup> Maurel, 'Alimentaire', p.41.

objective and there is no indication that the group ever departed from this policy regarding using Ivorians as store managers.<sup>104</sup>

Finally, the main strength which chain companies had was that, because the stores were supplied from a single buying house, bulk buying meant cheaper prices from suppliers and thus bigger margins.<sup>105</sup> Or at least that was the theory. In practice, the retail store owners probably saw little or none of the extra margin. Some stores in the SAVE chain purchased goods cheaper from other wholesalers than CFAO, the company which was supposed to be buying in bulk at low prices on their behalf.<sup>106</sup> In short, one might say that voluntary chain traders were exploited by CFAO. The margins in the Avion stores on products varied from 18% to 22% which probably meant that whilst the stores were getting goods cheaper than they could have done from another wholesaler, SCOA was taking a larger than normal cut given that there was no wholesale intermediary and that SCOA purchased the goods in bulk through its buying houses.<sup>107</sup> PAC margins were even less, up from just 12% in 1971 to 16.24% later in the same year.<sup>108</sup> There is unfortunately no information on the margin that the wholesale companies made but they would also have benefitted from buying in bulk. Their head offices took charge of importations through the respective Centrals d'Achats in Paris and other major centres in Europe and America as well as the purchasing of local manufactures.<sup>109</sup>

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<sup>104</sup> RCI, 'Action', p.2.

<sup>105</sup> IDET-CEGOS, 'Distribution', p.66; Assidon, Captif, p.108.

<sup>106</sup> Interview: Doh Gilles (2nd.).

<sup>107</sup> Fabiani, 'Circuits'.

<sup>108</sup> CCCI, Bulletin, 4.

<sup>109</sup> IDET-CEGOS, 'Distribution', pp.16-41; Bollinger, Marketing, pp.129-130; Maurel, 'Alimentaire', p.45; CCCI, Bulletin, 6, p.92; Fabiani, 'Circuits'; Interview: Kobenan: Assouan; DSA: memo, 'CFCI'.

### 4.3 WEAKNESSES OF WSE CHAIN STORES

Weaknesses of chain stores can be grouped under three headings: overheads, flexibility, and outreach (the area size from which a store can attract customers) and location. It will become increasingly apparent that many of the achievements and strengths of chain stores outlined above were more in theory than in practice, the reasons being substantially due to the three aforementioned factors. The main overheads which one or more of the retail chains had to face were transport, investment in buildings, technical assistance, publicity, training, unpaid loans, interest rates and corruption. Whilst the turnover from chain stores was substantial, the overheads outweighed any of the economies of scale which resulted from nationwide distribution.

Transport became a major problem for most of the chain store companies. One of the main reasons for this was the rise in transport costs. These approximately doubled between 1974-75 and the early 1980s from CFA 258 million to over CFA 500 million, or from roughly 3% to around 4% of turnover.<sup>110</sup> Many stores were over 500 kilometres from the Abidjan depots and the more stores the groups opened the greater the problem became. Further, many of the stores could only be reached via poor roads which meant a much shortened life span for lorries.<sup>111</sup> Even though SCOA moved to rectify this problem in 1973 by abandoning the uniform price policy, costs continued to be a drain on profits, not least because of the oil price shocks in the 1970s. By the early 1970s Chain Avion was delivering 50,000 tonnes of goods a year which meant a turnover of six billion CFA.<sup>112</sup> With SAVE it was the traders who had to pay transport costs<sup>113</sup> and this could only have increased their financial problems even though they could probably do it cheaper than CFAO. Partly as a

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<sup>110</sup> Grupp, 'Avion', p.364.

<sup>111</sup> If Bollinger, *Marketing*, pp.133-134 is checked against a road map for Ivory Coast, the problem becomes evident. From personal experience I was well aware of the need to minimise sales trips on poor roads as lorry lifespans are shortened and fuel consumption per kilometre can almost double; SCOA, 'Review of operations 1978'.

<sup>112</sup> Maurel, 'Alimentaire', pp.37-39.

<sup>113</sup> Interview: Doh Gilles (2nd.).

result, CFAO was forced to let some bad debtors continue trading so that they could pay back what they owed the company.<sup>114</sup>

The transport problem was less acute for the regional chains and all but insignificant for other WSE stores. The SOCOCE and CNCI regional chains, by their very nature, had less territory to cover whilst independent grocery stores bought from local wholesalers or travelling salesmen.<sup>115</sup> Supermarkets, being located in Abidjan, were close to their suppliers though most were delivered to by importers anyway.<sup>116</sup> Prior to 1980 CFCI delivered to major clients from all of its depots but after that year this was only done in Abidjan and Bouake where competition necessitated a more complete service.<sup>117</sup> IVODIS made no deliveries at all which would have put it at a disadvantage compared to many independents who occasionally delivered large orders, as did CNCI.<sup>118</sup> NSE stores were much like independent grocery stores in that they either bought from the local wholesaler or from a travelling salesvan. Many NSE traders owned five or even ten stores but rather than having them scattered across the country they located them in the same region to keep down transport costs and to enable them more easily to monitor the smooth running of the stores.<sup>119</sup> Where longer distances were involved, many used cheap forms of transport, for example carrying goods as luggage in a bush taxi. Many Lebanese and large African traders had lorries which were driven by informally-employed chauffeurs (i.e. cheap labour) and were barely road-worthy with repairs carried out by informal sector road-side garages with limited facilities but admirable expertise and efficiency.<sup>120</sup>

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114 Ibid.

115 Fieldwork: observation: discussions with traders; Interview: CNCI Director; Personal experience: observation: discussions with Lebanese and Ivorian traders.

116 Personal experience: observation; DSA: invoices (1980-90).

117 Interview: Assouan.

118 Fieldwork: discussion with IVODIS gerant in Korhogo; Interview: CNCI Director.

119 Fieldwork: discussions with traders (see also table in previous chapter); Interview: El Jilani Ould Boubakar, Mauritanian wholesaler at Koumassi since 1970 (Abidjan, December 8 1990).

120 Fieldwork: observation; Personal experience: observation: discussions with traders and garage owners. DANAFCO often used informal garages for

Technical assistance, publicity, administration and training further added to costs. As already indicated, technical assistance involved employing supervisors to visit stores monthly and assist with bookkeeping, stock taking and other problems which might arise. Given the desire to introduce western commercial methods into a developing economy, these were mostly unavoidable but costly fixed expenses. PAC and Avion had all of these expenses, including the running of the Ecole de Commerce and Avion's commercial school<sup>121</sup> whilst SCOA footed the bill for SIDEKO's technical assistance program from which 99 traders were benefitting from in 1964.<sup>122</sup> Whilst at SAVE it was the traders who were responsible for the upkeep of the property, it was CFAO who paid the bill.<sup>123</sup> It also appears that, despite spending money on technical assistance SIDEKO failed to adequately monitor their member traders,<sup>124</sup> and that SAVE made similar mistakes. They failed to select traders with the same rigour that Avion did<sup>125</sup> and do not appear to have given any, or at least very little, training.<sup>126</sup> Whilst many thousands of individuals trade in the informal sector without any instruction, it seems inevitable that for an operation like SAVE, with all the money staked in it and with more fixed financial obligations to be met, a sound ability to handle bookkeeping would be required: supplying the materials was not enough.

As far as physical appearance was concerned, there is no evidence to suggest that Ivorians cared whether a shop's shelves and doors were nicely painted or not, yet considerable emphasis was placed

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minor maintenance work as the company's experience was that they were quicker and cheaper than their formal sector equivalents. Most were also more honest in their assessment of what repairs and spare parts were needed.

<sup>121</sup> Bollinger, *Marketing*, pp.130-135; Maurel, 'Alimentaire', pp.37-43.

<sup>122</sup> Fabiani, 'Circuits'; Bonnefonds, 'Traite', p.400; SEDES, 'Sud-est'.

<sup>123</sup> Bonnefonds, 'Traite', p.405.

<sup>124</sup> IDET-CEGOS, 'Elements', p.4.

<sup>125</sup> Ibid, p.3; SEDES, 'Sud-est'.

<sup>126</sup> SEDES, 'Sud-est'.

on this<sup>127</sup> apparently in the unproven belief that customers were put out by the shabbiness of NSE stores. Further, most WSE stores from SIDECO to SACI, JAG and the supermarkets had salaried employees which meant paying a minimum wage maybe twice that of what Lebanese traders paid store assistants.<sup>128</sup> Avion managers were given family allowances, some medical insurance also covering the family, annual holidays,<sup>129</sup> free accomodation, electricity, water, property insurance and a trading licence.<sup>130</sup> NSE traders in general, as was shown in the previous chapter, were likely to use family labour and wasted few resources on overheads generally.

Wholesale chains, as has already been observed, did not promote their products and also had no technical assistance expenses in the way that the retail chains did. However, they were at a disadvantage to independent wholesalers on costs related to salaried employees for independents used mostly family labour.<sup>131</sup> At the end of 1990, Commerce et Distribution de Cote d'Ivoire (CDCI, as CFCI was renamed in March 1989) had 30 outlets in Ivory Coast, each with a manager. Controlling the managers were ten *Chefs de Secteur* who were each responsible for three stores. They in turn were answerable to the *Directeur Commerciale* in Abidjan.<sup>132</sup> CNCI and SOCOCE administration was not only simple but worked in fairly simple, but perfectly adequate, surroundings, in marked contrast to some other wholesale companies.<sup>133</sup>

Unpaid loans and investments in buildings and other materials further increased overheads. From 1956 to the mid 1960s, SCOA

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127 Personal experience: observation; Fieldwork: observations at the Ecole de Commerce (December 1990); CCCI, Bulletin, 4; photographs in SCOA, '1907-1987: 80em anniversaire' (Telex Journal, Numero special, 1987).

128 Bonnefonds, 'Traite', p.400; CCCI, Bulletin, 4; Bollinger, Marketing, p.134; CCCI, Bulletin, 6, p.93; Fieldwork: observation.

129 Grupp, 'Avion', pp.360-361.

130 Bollinger, Marketing, p.131; Maurel, 'Alimentaire', p.37.

131 Personal experience: observation. Also, see the questionnaire responses in the previous chapter.

132 DSA: memo, 'CFCI'.

133 Fieldwork: observation.



managed to limit building expenses by converting its old trading stations into stores but by the end of the decade there were few left to convert.<sup>134</sup> PAC had to start from scratch and although the traders were supposed to reimburse the state for the store, the fact that there were closures from at least around 1976<sup>135</sup> and probably earlier supports the assumption that there were bad debts incurred by the government as at least some of these closures would have involved traders who had not repaid the loan. In addition, it is possible that the group incurred losses on the non-payment of goods delivered to some stores which were in financial difficulty. This problem was also faced by CFAO with its SAVE chain.<sup>136</sup>

These financial problems occurred despite the deposits which many traders had to make. Avion managers, before being assigned a store, had to pay CFA 150,000 deposit,<sup>137</sup> increased to 300,000 by 1969.<sup>138</sup> PAC students had to deposit CFA 50,000 which represented the first re-imbusement of the loan they would get upon completion of the course.<sup>139</sup> Some of SIDECO's finance came from its members, the traders who benefitted from the services provided by the company, each of whom deposited a sum of CFA 100,000 for which they could obtain goods on credit,<sup>140</sup> conditional on the additional payment in advance of 1% of the value of goods ordered.<sup>141</sup>

In PAC's case, the problem of unpaid loans was worsened by corruption. PAC was under the overall control of Henri Konan Bedie who was the *Ministre de l'Economie et des Finances* at the

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<sup>134</sup> Bonnefonds, 'Traite', p.403; Bollinger, *Marketing*, p.130.

<sup>135</sup> Bollinger, *Marketing*, pp.131-135; RCI, *La Cote d'Ivoire en chiffres 1980-81*; T-C. Gnui, 'Enquête sur les conditions d'implantation de magasins PAC dans la zone AVB' (Maitrise d'économie appliquée, Faculté Sciences Economique, Université National de la Cote d'Ivoire, Abidjan, 1978).

<sup>136</sup> IDET-CEGOS, 'Elements', p.3.

<sup>137</sup> Interview: Kouakou; Grupp, 'Avion', p.360.

<sup>138</sup> Diambra-Hauhouot, 'Agglomeration', p.6.

<sup>139</sup> RCI, 'Action', p.6.

<sup>140</sup> Bonnefonds, 'Traite', pp.400-401.

<sup>141</sup> *Ibid*; IDET-CEGOS, 'Distribution', p.66.

time of the initiation of the group in 1970.<sup>142</sup> However he spent much time abroad setting up the Ivorian UN mission and eventually was dismissed in 1977 after being accused of economic mismanagement.<sup>143</sup> One source claims that, during his absence, PAC was badly managed and corruption set in as politicians sought to place their sons and an assortment of other relatives in the group without them having the right qualifications.<sup>144</sup> Verifying this now is probably impossible but given the record of elite corruption in the country, it must surely be a strong possibility.

The second group of weaknesses relates to flexibility. This concerns uniform stocking policy, the delivery system, incentives and the uniform structure of the various chain store groups. By stocking the same range of products in every store, the small retail chains took no account of regional differences in demand which, as is illustrated in Chapter Six, vary considerably. For example, NSE stores in the west carried a far higher proportion of cosmetic products than did those elsewhere. In the east, stores were more inclined to stock items familiar to Ghanaian consumers due to the large number of cross-border migrants.<sup>145</sup>

Sales statistics might indicate that the wholesale chains were more flexible in this respect as there were considerable variations in the types of products sold in different regions. In 1962 for example 27.9% of the turnover in Abidjan (which accounted for 50.5% of all food and drinks sales by the commercial houses) of the 15 largest companies was in food and drink products whilst in the surrounding sub-prefectures of Abidjan it was 60.3% and the south west region (Sassandra, Bereby, Tabou etc) 55.2%.<sup>146</sup> If

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<sup>142</sup> RCI, 'Action', p.2.

<sup>143</sup> R.J.Mundt, Historical Dictionary of the Ivory Coast (Scarecrow Press, Metuchen, 1987), p.92.

<sup>144</sup> Interview: Kouakou. It should be noted that the interviewee is of the same ethnic group (Baoule) as Konan Bedie. Such links have been known to cloud judgement of ministerial capabilities (witness Houphouet and FPI leader Gbagbo scoring heavily in their own regions in the 1990 Presidential elections).

<sup>145</sup> DSA: internal report, L.Bosteen, 'Bush Sector'; Fieldwork: regional distribution survey.

<sup>146</sup> IDET-CEGOS, 'Distribution'.

nothing else, these figures do indicate the folly of the small retail chains' uniform stocking policy. The Mini-Score managers, whose stores carried roughly 3,000 references of which between 1,500 and 2,000 were food items, were allowed some leeway in deciding which products to stock.<sup>147</sup>

The reliance of chain stores on fixed delivery dates often meant stock ruptures impeding the efficiency of the service they provided as they were not allowed to buy stocks from any other supplier. Deliveries to the stores from the central warehouse were usually made weekly at a fixed hour on a fixed day at which time orders for the following week also were taken.<sup>148</sup> SIDECO and PAC had a similar system though the former owned 16 depots around the country from which goods were dispatched.<sup>149</sup> Managers were not allowed to try new products which might have attracted a loyal clientele in their cachment area.<sup>150</sup> Further, due to the time it took to deliver goods, ruptures in stock in the Chaine Avion stores in 1983 were as long as eight to ten days.<sup>151</sup>

Score supermarkets listed around 200 items for which there should never be a rupture in stock. But from 1983, orders for other products were only placed once there were no items of a product group left on the shelf. This led to situations where, if there were three flavours of a particular brand of honey and two sold out, a new order for all three would not be placed until the last flavour had also sold out.<sup>152</sup> Monoprix had 7,000 lines chosen from the same products as those sold in the French Monoprix yet between 60% and 70% of the clients were African<sup>153</sup> which, with African consumers the worst affected by the recession, perhaps

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<sup>147</sup> Interview: Mr. Yace, SCOA Service d'Achats (Abidjan, December 15 1990).

<sup>148</sup> Maurel, 'Alimentaire', pp.37-39.

<sup>149</sup> IDET-CEGOS, 'Distribution', p.67; Fabiani, 'Circuits'; Bonnefonds, 'Traite', pp.400-401; CCCI, Bulletin, 6, p.93.

<sup>150</sup> Personal experience: this phenomenon was found to work in favour of such products as lucozade (amongst some Mauritians) and marmite (amongst retailers in areas with a large Ghananian population).

<sup>151</sup> Fieldwork: notes taken from Mme R.Theze who kept records of meetings during weekly sales visits to the Abidjan supermarkets in 1983.

<sup>152</sup> Fieldwork: Theze notes.

<sup>153</sup> Maurel, 'Alimentaire', p.45.

explains why it was the first to be forced to close in 1983.<sup>154</sup> Compare this to the flexibility of the Trade Center supermarkets. The Trade Center group placed more emphasis on food items than the other supermarkets. The original store sold only foods of which 60% were fresh and there was one shelf devoted to American products.<sup>155</sup> All of the group's stores were noticeably more presentable than those of any other supermarket. Spacing between shelves was greater, the interior decoration newer and the stores spotlessly clean.<sup>156</sup> The success of the Trade Center over the other groups is perhaps best explained by its apparently concentrating on the European and Lebanese consumer groups, to whom tidiness appealed, and by its tendency to stock more non-French items than the others.<sup>157</sup>

The final area of inflexibility concerns the uniform structure of the groups. Whilst this may or may not have helped to increase "*la solidarité nationale*"<sup>158</sup> as Grupp claims it did for Avion, it certainly did nothing for the ability of the *gerants* to adapt to local or special circumstances. They would have been unable, for instance, to launch special price promotions on products which showed potential or which were moving slowly for the uniform price policy would have, for the most part, prevented such an initiative. Nor, given that they could only obtain stock from the parent companies (SAVE traders, for instance, had an exclusive contract with CFAO), would they have been as likely to receive promotional gifts and aids such as caps and plastic bags from travelling salesman. Such items were used as inducements by salesmen and thus they tended to hand out aids in relation to the sales they made at each store.<sup>159</sup>

Again, none of these problems were faced by NSE stores. They could purchase goods from the nearest wholesaler whenever the

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<sup>154</sup> Personal experience: observation (1983).

<sup>155</sup> Maurel, 'Alimentaire', p.45.

<sup>156</sup> Fieldwork: observation.

<sup>157</sup> Fieldwork: brand range survey.

<sup>158</sup> Grupp, 'Avion', p.365.

<sup>159</sup> Personal experience: I was responsible for the distribution of these items (1984-85); Maurel, 'Alimentaire', p.39; Bonnefonds, 'Traite', pp.404-405.

need arose and adapt to sudden shifts in demand as well as regional circumstances and the demands of particular customers.<sup>160</sup> Being independent, they also had more incentive to succeed than the salaried employees of some of the retail chains and all of the wholesale chains even if one considers that commission was paid. SCOA paid their small retail managers a commission of 4% of the store's total turnover plus 1% of untaxed merchandise, yielding in all an average of 4.75% of the sales value in the early to mid 1970s.<sup>161</sup> JAG, SACI and other chain store managers were also paid a commission.<sup>162</sup>

Perhaps in response to declining growth in turnover in the 1960s (in 1964 it was 31.5%, in 1965 20.8% and in 1966 just 5%),<sup>163</sup> SCOA launched a number of initiatives in the 1970s aimed at encouraging their store managers. In 1975 and 1977 they received shares with those who had been with the company longest having priority.<sup>164</sup> By 1978 the *gerants* held 20% of Chaine Avion's capital.<sup>165</sup> In addition, they were granted representation on the *Conseil d'Administration*, a move which followed the setting up of Avion as a separate company. Earlier, the *gerants* created the Union des Gerants-Mandataires de Chaine Avion Cote d'Ivoire (UGMCACI). Through this body and the store managers' representation on the *Conseil*, SCOA hoped to increase understanding and co-operation within the company. Further, some *gerants* were sent to France to attend courses at the company's expense.<sup>166</sup> The aims of these changes are well summarised by Grupp when he said "*Il est clair que, pour rendre la Chaine Avion solide et performante, SCOA a joué, au maximum, la cart de l'incitation matérielle et psychologique*".<sup>167</sup>

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160 Personal experience: observation; Fieldwork: observation.

161 Bollinger, *Marketing*, p.131.

162 CCCI, *Bulletin*, 6, p.93.

163 IDET-CEGOS, 'Elements', p.2.

164 Grupp, 'Avion', p.361.

165 Assidon, *Captif*, p.108.

166 Grupp, 'Avion', p.358.

167 *Ibid.*

Despite the changes, profits declined in the late 1970s: between 1976/77 and 1977/78 they fell from FF 1,550,000<sup>168</sup> to FF 1,398,000,<sup>169</sup> a decline of 10%<sup>170</sup> on a turnover that rose by 10% over the same years.<sup>171</sup> The profit for 1977/78 represented just 0.64% of turnover. Further, with the economy in decline, the government became more strict on price margins as it sought to control inflation so profit margins on products were squeezed.<sup>172</sup> At the same time, SCOA had progressively to increase the commission it gave to the *gerants* as they faced increasing costs, especially concerning the people they employed to help them in the stores.<sup>173</sup> As a result of these developments, SCOA instituted more changes in the structure and functioning of Avion. In 1981 (by which time SCOA had purchased the shares given to the *gerants* in 1975 and 1977)<sup>174</sup> Avion became a part of the IVODIS group along with the Score supermarkets and the loss making outlets were closed.<sup>175</sup> In 1984 they allowed the managers to buy goods from other suppliers on their own initiative<sup>176</sup> and, finally, in the same year, they were allowed to buy the stores.<sup>177</sup>

Wholesale chains, especially the national ones, were probably more hampered by inflexibility than anything else. CFCI, like most other establishments of its kind, stocked only goods which were manufactured locally or which it imported itself. In the late 1980s many food items were dropped because of 'the extent of fraud which enables Lebanese companies to import goods with much lower customs costs'.<sup>178</sup> The independent and regional wholesalers

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168 SCOA, 'Assemblée Générale Ordinaire du 28 février 1978, Exercice 1976/77.'

169 SCOA, 'Les Comptes, Exercice 1977/78.'

170 SCOA, 'Review of operations 1978', gives the figure as 20% which is probably a misprint.

171 Ibid.

172 Ibid.

173 Grupp, 'Avion', p.360.

174 Ibid, p.357 (footnote 3).

175 Assidon, *Captif*, p.111.

176 Personal experience: discussion with Mme R.Theze who, until that time, was responsible for supervising Chaine Avion orders (1984).

177 Assidon, *Captif*, p.111.

178 Interview: Assouan.

had no such policy, instead buying, locally if necessary, whatever products their customers demanded.<sup>179</sup>

National wholesale chains were also generally less flexible on credit conditions. IVODIS gros, for example, gave 20 days credit to clients judged to be reliable.<sup>180</sup> Also, most wholesale store managers rarely left their stores, their only contact with clients being when the client came to buy.<sup>181</sup> CNCI's system for credit and deliveries was fairly flexible. Clients could fetch the goods themselves or have them delivered. Some clients paid cash, others benefitted from the company's depot system whereby goods were deposited with a client for a previously agreed period of time at the end of which he had to either pay in full or return the stock which was unsold at the same time as paying for the balance. CNCI had no salesmen, just *Chefs des Ventes* who monitored clients. The company's flexible attitude concerning credit conditions would have helped to minimise risk without jeopardising sales volume. Further, by granting clients the option of returning unsold goods, CNCI avoided both bad relations and pressurising them to sell which could have led to the client cutting prices and destabilising the market.<sup>182</sup> By the 1980s, SOCOCE dominated the wholesale trade in its region and was the main distributor there for Nestlé products as well as several others. Its success is generally attributed to its knowledge of semi-wholesalers, mostly Lebanese.<sup>183</sup> As the previous chapter illustrated, independent wholesalers were even more flexible (and also knowledgeable) in their methods of operation.

The final group of weaknesses concerns outreach and location, factors which affected the small retail chains almost from the

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<sup>179</sup> Fieldwork: discussions with Lebanese traders and CNCI store manager, Korhogo (November 1990).

<sup>180</sup> Fieldwork: discussion with IVODIS manager in Korhogo (November 1990).

<sup>181</sup> Personal experience: discussions with store managers in Gagnoa and Man (1984-85); Interview: Mr. Konan, Manager of IVODIS gros store (Aboisso, November 8, 1990).

<sup>182</sup> Interview: CNCI Director.

<sup>183</sup> Personal experience: according to both other Lebanese traders and Marc Cheriaux, formerly managing director of DANAFCO, now at Ducros (Cote d'Ivoire).

beginning and the grocery chains since the economic downturn. Given that small retail chains stocked around ten times as many lines as the average NSE store by the 1970s, a far higher turnover was required to support the financing of so much stock. This proved a heavy burden when, between 1975-76 and 1981, interest charges as a proportion of turnover increased from 0.8% to 1.65%<sup>184</sup> and meant that chain stores had to have a large consumer outreach. However, poor consumers were unlikely to travel far to make their purchases and what purchases they did make were small ones every day rather than large ones once or twice a week. The reasons for this were practical: they did not have cars so could not transport large quantities; their financial resources at any given time were usually scarce so they could not afford to buy in large quantities; and they mostly did not have the necessary storage facilities at home so perishable goods had to be purchased daily. Additionally, because they shopped on foot, most preferred to visit two or three stores within five minutes walking distance rather than walk twenty minutes to one store where all purchases could be made. Thus the small retail chain could not entice enough customers to justify the stock range they held.<sup>185</sup>

The aim of Avion was to present the Ivorian consumer with a store which stocked all of the goods they might want (i.e. not just basic items) at uniform prices in an attractive environment. In practice, this involved too many overheads as stocks were necessarily larger than the average independent small retailer due to the large number of lines sold.<sup>186</sup> Probably because of the high overheads, the advantage in prices when shopping at Chaine Avion was far from always borne out in 1983 at least.<sup>187</sup> The

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<sup>184</sup> Grupp, 'Avion', p.364.

<sup>185</sup> See, for example, R.Savitt, 'Retail Change and Economic Development'. Chapter 2 in A.Findlay, R.Paddison, and J.Dawson (eds.) Retailing Environments in Developing Countries (Routledge, 1990); A.Goldman, 'Outreach of Consumers and the Modernisation of Urban Food Retailing in Developing Countries', Journal of Marketing, 38 (October 1974); S.Samiee, 'Impediments to Progress in Retailing in Developing Nations'. Chapter 3 in Findlay et al (eds.), Retailing.

<sup>186</sup> IDET-CEGOS, 'Elements', pp.2-3.

<sup>187</sup> Personal experience: frequent visits into the interior were made at this time.



same problems also affected other outlets which carried a similar number of lines (PAC, Elephant, SIDECO and possibly SAVE).<sup>188</sup>

As far as location was concerned, the number of small retail chains meant that there were often several stores within a short distance of each other, thereby further limiting the ability of each individual outlet to capture the necessary number of customers. Whilst Avion went to considerable lengths in researching the feasibility of opening stores in selected areas,<sup>189</sup> SAVE had a tendency to open stores close to other retail chains selling a similar line of goods at similar prices.<sup>190</sup> As a result, turnover was adversely affected with both stores competing for the same clientele. By the early 1980s, if not earlier, the problem was that too many stores were located away from the main areas of commercial activity due to the rapid growth and changing business patterns of many towns. Few were ever constructed near market places where they might have acted as semi-wholesalers to market traders, a function often vital to the survival of NSE stores.<sup>191</sup>

Grocery chains were aimed at a different type of consumer and, as long as middle income customers existed in sufficient numbers, they survived. These consumers often did have cars, fridges, freezers and the money to make large purchases a practical option. Thus, the outreach required to justify the size of these stores was attained. The outlets were located in all the major towns as well as most of the districts of Abidjan.<sup>192</sup> The 1968 JAG stores, all air-conditioned and selling fresh fruit and vegetables and frozen fish in addition to a wide range of other consumer goods, were mostly located in the coffee and cocoa belts,<sup>193</sup> presumably to cash in on the higher incomes in these areas. The

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<sup>188</sup> Bonnefonds, 'Traite', p.404; IDET-CEGOS, 'Distribution', p.67.

<sup>189</sup> Bonnefonds, 'Traite', p.404.

<sup>190</sup> IDET-CEGOS, 'Elements', p.3.

<sup>191</sup> Personal experience: observation: discussions with traders; Fieldwork: observation: discussions with traders. See also the comments in the previous chapter on retailers as semi-wholesalers and the evidence from the cube trade in chapter 7.

<sup>192</sup> Bollinger, Marketing, pp.130-136.

<sup>193</sup> IDET-CEGOS, 'Elements', p.5.

Mini-Score, with a surface area of between 250 and 300 m<sup>2</sup>, were intended to attract clients from their localities.<sup>194</sup>

However, when the economic climate deteriorated all eventually had to close because of the contraction of their customer group. The high survival rate of Lebanese independent grocery stores was probably due to them having built up a loyal clientele through personal contact over many years, their lower costs through the employment of family labour and because they were able to vary their product lines according to demand.<sup>195</sup> They were probably the preferred stores of the Lebanese community which, especially in the towns of the interior, tended to be fairly close knit.<sup>196</sup> By the mid 1980s, the mini-Score and the declining SACI apart, the vast majority of grocery stores were privately owned independents.<sup>197</sup> Many of these were owned by former Avion and PAC traders.<sup>198</sup>

Supermarkets also fared better than chain stores. Catering primarily to high income groups, the majority attracted most of their clientele from the expatriate community which was probably largely unaffected by the recession in terms of income. It was only during the mid 1980s that many began to leave the country<sup>199</sup> and it is only since then that supermarket numbers declined. PROSUMA can be seen as the most European orientated of the groups. Nour Al Hayat in the early 1970s stocked some 4,000 different food lines with 55% of these being preserves and catered for between 40,000 and 45,000 customers per month.<sup>200</sup>

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<sup>194</sup> Interview: Mr. M. Anthony, Director of the Score group (Abidjan, November 1990).

<sup>195</sup> Personal experience: discussions with salesmen and traders; Fieldwork: discussions with traders.

<sup>196</sup> Personal experience: discussions with Lebanese traders and Frederick Attoh, DANAFCO Branch Manager at Bouake, 1982-88, later General Manager; Fieldwork: discussions with Lebanese traders e.g. Alimentation Camille in Gagnoa.

<sup>197</sup> DSA: internal reports, L. Bosteen, 'Abidjan Town' and 'Bush Sector'.

<sup>198</sup> Personal experience: observation.

<sup>199</sup> Mundt, *Dictionary*, p.71.

<sup>200</sup> Maurel, 'Alimentaire', p.43.

In 1990, 90% of Nour Al Hayat clients were Europeans<sup>201</sup> whilst around 80% of Champion's clients were European, most but not all of them French, 10% were African and 10% were from other continents. Many of the latter's clients were embassy employees in the area. The PROSUMA group stocked more non-Ivorian products than any other in the country.<sup>202</sup>

In marked contrast to PROSUMA, 98% of clients at Score 1 in 1990 were African whilst the other three Scores attracted a clientele which was 60% African, most of them from the areas surrounding the stores. Given this reliance on African clients, their closure is perhaps not surprising for it was the middle to upper income Ivorians who lost the most during the 1980s.<sup>203</sup> There was also a locational problem with the Score Koumassi store which was badly designed and, by 1990, was facing competition from three other supermarkets in the area.<sup>204</sup>

Location was also a problem for the Société de distribution et de commerce (SODICO). SODICO rapidly acquired a reputation for slow payment of invoices and it seemed clear from the start that the Prima outlet was losing money.<sup>205</sup> Located in Zone 4, it faced stiff competition from Super Hayat and the Trade Centre's expanded outlet bought from Bijani Freres. Outreach was not the sole problem though; whilst the staff were unfailingly polite and the premises clean, many goods were damaged and many popular lines were not stocked.<sup>206</sup> The fact that one of the backers was reportedly refused permission to build a store in Yaounde because of bad debts<sup>207</sup> probably did not help confidence amongst suppliers.

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<sup>201</sup> Fieldwork: discussion with Sultan Ali Esmail, General Manager of PROSUMA (October 1990).

<sup>202</sup> Interview: Paoli.

<sup>203</sup> EIU, Reports (various issues 1989-93).

<sup>204</sup> Interview: Anthony.

<sup>205</sup> Fieldwork: These notes.

<sup>206</sup> Fieldwork: observation.

<sup>207</sup> EIU, Report (No.1, 1990), p.29.

Problems of outreach for most stores were compounded by declining incomes during the 1980s. This hit Avion especially hard as 98% of its clients were African.<sup>208</sup> Supermarkets, which shared an estimated 35 billion CFA market in 1989<sup>209</sup> were faced with a declining European population (80% of supermarket clients overall) and the squeezing of African incomes.<sup>210</sup> Whilst chain stores in the US faced similar problems (but survived) in the wake of the Great Depression,<sup>211</sup> the economy cannot be held responsible for their demise as SAVE, SIDECO, Elephant and PAC had all collapsed or were collapsing by the late 1970s when incomes had not yet begun to decline.

Another scapegoat for the problems of WSE stores has been the Lebanese. Many of CDCI's problems were, according to the *Directeur d'Achats* Claude Assouan, due to fraudulent competition by the Lebanese.<sup>212</sup> Others too complained of unfair competition from smaller Lebanese traders who allegedly got by on fraud but, as the head of the government's anti-fraud division pointed out, this was difficult to prove.<sup>213</sup> Supermarkets also complained of fraud but their clients were different from those of Lebanese wholesalers. Perhaps more justifiably, African Business reported that in October 1991 "merchants in Abidjan closed their shops and held a demonstration in protest against . . . corrupt customs officials, some of which reportedly refuse to give receipts for duties paid unless they are bribed first".<sup>214</sup> However, this affected all importer-distributors.

Location has also played a part in the downfall of the national wholesale chains. Many of their stores occupied old buildings located away from the market places and small retail stores. The CFCI store in Gagnoa, for example, was one of the furthest

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208 Maurel, 'Alimentaire', p.41.

209 EIU, Report (No.1, 1990), p.28.

210 SCIMPEX, 'Commission'.

211 Hollander and Omura, 'Chain', p.309.

212 Interview: Assouan.

213 EIU, Report (No.1, 1990), p.29.

214 M.Dzisah, 'Prime Minister Completes His First Turbulent Year in Office', African Business, 161 (January 1992).

wholesalers from both local markets whilst the outlet in Zone 4 was nowhere near any other similar commercial activity. The same was also true of IVODIS gros in Aboisso and many of the SACI stores. In marked contrast, independent wholesale stores were located close to market places and were often jammed with customers throughout the morning when most semi-wholesale purchases were made.<sup>215</sup> The decline of WSE chain stores and the domination of independent and NSE outlets by foreigners further removed Ivorians from the commercial environment.

#### 4.4 THE POLITICS OF WSE IVORIANISATION AND THE PNCI

At a seminar held at the Ministry of Commerce in 1982 on the extent of Ivorian participation in internal distribution, the concluding report complained of "*la mentalité non-commercante de l'Ivoirien*".<sup>216</sup> Yet, though the government may well despair at the inability of Ivorians to compete with foreign traders, rarely has it been their genuine ally. The previous chapter examined Ivorian participation in the NSE sector and concluded that little had changed since before independence. WSE private and state chain store initiatives were championed by the government as a way of redressing this imbalance as well as providing a national distribution network but neither initiative assisted established Ivorian traders in the NSE sector. Boone argued that in commerce,

Relations between the Government and indigenous business interests . . . seem to have been guided by a statist strategy aimed at (i) co-opting an élite into lucrative, 'rent-collecting' niches that lay under the direct control of the régime's leaders, and (ii) circumscribing possibilities for the expansion of parts of the local private sector that might have maintained or developed more political independence vis-à-vis the state.<sup>217</sup>

In arriving at the first point of this conclusion, Boone contended that the state's support for the foreign private sector was less than "some observers have argued" as many of PAC's activities

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<sup>215</sup> Personal experience: observation; Fieldwork: observation.

<sup>216</sup> RCI, 'Séminaire sur le commerce, thème 2: promotion d'un commerce ivoirien' (Ministère du Commerce, Abidjan, novembre 1982).

<sup>217</sup> Boone, 'Commerce', p.91.

encroached upon their importing and distribution interests.<sup>218</sup> The reasons for state support for Avion and other mainly French chain store initiatives prior to PAC are not difficult to find. Their employment of Ivorians was consistent with the government's Ivorianisation policy and would have garnered popular support for the regime. Also, the retail networks were seen as part of a foreign investment driven industrialisation strategy which required the expansion of the internal market. Perhaps most importantly, the chain store operators were easier to tax than the informal sector and counterbalanced the vibrant Lebanese sector. Mytelka's contention that foreign capital and interests have shaped Ivorian economic growth<sup>219</sup> is inaccurate when applied to the distribution sector. Foreign interests had some influence but it was the ruling elite which reaped most of the benefits.

Boone's second point was, in effect, an application to Ivory Coast of an idea which Boumedouha had already hinted at for Senegal:

The Senegalese elite must have known that they were better off with a powerless community, and (arguably) one drawn from a foreign ethnic group, dominating certain trading sectors than with the Senegalese.<sup>220</sup>

Taken together, these arguments lead to the conclusion that the state was primarily interested in preserving an internally and externally politically non-threatening balance of French, Lebanese and Ivorian interests in the commercial sector at the same time as milking what financial benefits it could. However, the collapse of first PAC and then Avion, and the ever increasing commercial muscle of the Lebanese, has rendered this argument redundant for the mid 1980s onwards.

With the number of Ivorians in trade still intolerably low, in the view of the government and of many Ivorians, the state decided to launch another initiative, the Programme National de

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<sup>218</sup> *Ibid.*

<sup>219</sup> L.K.Mytelka, 'Foreign Business and Economic Development'. In I.W.Zartman and C.Delgado (eds.), The Political Economy of Ivory Coast (Praeger, New York, 1984), p.172.

<sup>220</sup> S.Boumedouha, 'Adjustment to West African Realities: the Lebanese in Senegal', *Africa*, 60, 4 (1990), p.544.

Commerçants Ivoirien (PNCI) in 1985.<sup>221</sup> The PNCI aimed to increase the number of Ivorians owning retail stores as well as helping those that already existed to survive. The project was financed by the French and Ivorian governments with three French technical assistants sent to help run the programme from 1985 to 1989.

The technical assistance consisted of supplying simplified accounting books, stock ledgers and any advice that might be required. Traders were also supplied with a PNCI sign to display on the front of the store and were advised on the range of produce they should stock.<sup>222</sup> For the small (level one) store with a surface ranging from between 10m<sup>2</sup> to 60m<sup>2</sup>, 110 product lines or references were recommended. New traders at this level required around one million CFA, half for the premises and half for the stock. For larger (level two) stores of a surface area between 60m<sup>2</sup> and 120m<sup>2</sup> 200 references were recommended with an additional financing of half a million for the extra stock.<sup>223</sup> Assistance was free on the condition that traders could meet the financial requirements.<sup>224</sup>

In 1989, with perhaps one eye on the ever increasing Lebanese dominance, a new initiative in the programme offered 300 hours of free training to any trader, regardless of nationality, who had a commercial licence, was registered with the Chambre de Commerce and owned a fixed place outlet with at least 200,000 CFAs worth of stock. 180 hours of the training was theoretical, the rest practical. Also in 1989 the French government withdrew from the financing of the project. By this time assistance was costing an

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<sup>221</sup> Interview: Mr. Jacques La Rue, Chef de Mission PNCI (Abidjan, December 12 1990).

<sup>222</sup> Ibid.

<sup>223</sup> Interview: Mr. Fofana Coulibaly, Director of the Ecole de Commerce (Abidjan, December 4 1990). He was previously in charge of PAC training which also took place at the same premises, and was kind enough to give me a tour of the buildings. Unfortunately, PAC archive records were destroyed some years ago.

<sup>224</sup> Interview: La Rue.

average of CFA 25,000 per month per trader but the Ivorian government maintained its commitment to the programme.<sup>225</sup>

The principal financial source for new traders in the PNCI was the family. There was a danger here in that family members would want something back so traders were effectively recommended to take the money and set up the store somewhere else. A better source, but less common, was indirect family finance whereby a wealthy relative (usually a member of the political elite) gave the money. Such cases rarely resulted in subsequent interference by the benefactor. Severance pay for employees made redundant by firms closing down or contracting was another source. Some employees nearing retirement set up their son or nephew using their salary and retirement benefits as it was forbidden for a salaried person to own a commercial establishment. Finally, there were a few cases where a group of traders banded together to help a new trader get started (which very much resembles the Mauritanian method).<sup>226</sup>

At the end of 1990 there were 850 Ivorian traders registered with the programme,<sup>227</sup> traders who were effectively being transferred from the NSE sector to the WSE sector. However, there were some important differences from the PAC initiative. First, the range of products recommended was smaller than the number carried by the old chain stores. Second, the traders were perfectly free to take on additional products if they so wish. Finally, traders purchased the goods locally or wherever they wished rather than being delivered to from a central depot.

There is thus an attempt to combine the perceived strengths of both WSE and NSE stores. Only time will tell whether this will work but it seems that at least one lesson has yet to be learned: consumer outreach, or the area from which a store draws its customers. Stores are still being recommended to stock more lines than most NSE small retailers sell - an average value of 500,000

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<sup>225</sup> Ibid.

<sup>226</sup> Ibid.

<sup>227</sup> Ibid; Interview: Coulibaly.



CFA compared to 200,000 CFA. Nor does the recommended list take account of regional differences. PNCI members must also invest between 500,000 and one million CFA in their property to qualify for technical assistance, a sum far exceeding that expended by most NSE small retailers and an excessively high entry threshold. One can therefore only conclude that if this initiative survives, it will be both because of and in spite of the advice the traders are receiving.

#### 4.5 CONCLUSION

Every attempt at nationwide distribution in Ivory Coast since 1956 has failed. None of these initiatives survived and many folded in the 1960s and 1970s when economic growth in Ivory Coast was matched by few countries anywhere else on the African continent. The only WSE companies with more than a handful of outlets operating in 1992 (CNCI and SOCOCE) traded only in the north and centre west regions, the former being the poorest region of the country. Clearly, therefore, the economic recession of the 1980s cannot be held entirely responsible for these failures. In the US, the Great Depression led to a severe scaling down of chain store operations in the 1930s but they survived.<sup>228</sup> The correlation found in Europe between an increase in personal consumption per capita and an increase in sales per full-time person employed in chain stores was but one reason for this failure, albeit an important one.<sup>229</sup> Despite this, all of the sources consulted on internal distribution in Ivory Coast have blamed the recession, only reluctantly admitting as secondary factors a few of the above mentioned failings of the small retail and grocery chains.

Chain store operations did have some successes. Price conformity became the rule rather than the exception, some Ivorians did benefit enough from their training to survive independently and far more goods did become available to many consumers.

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<sup>228</sup> Hollander and Omura, 'Chain', pp.307-309.

<sup>229</sup> Jefferys and Knee, Europe, pp.35-39.

However, private interests failed to convert their dominance of importing into a similar dominance in distribution. The state too failed to dominate the sector. Whilst goods became widely available, neither the state nor the private companies could force the consumers to consume them. Consequently, the boost which a nationwide distribution network was expected to give to the Ivorian industrialisation strategy, based on the western experience of large-scale retailing being "brought into existence by the development of mass production of consumer goods on the one hand and by the growing homogeneity of effective consumer demand on the other" never really materialised. This 'homogeneity of effective consumers' had arisen through wage-earning employment, urbanisation and improved communications.<sup>230</sup> In the west, stores were located in urban areas, especially booming suburban ones,<sup>231</sup> whereas in Ivory Coast many were in villages. Further, the wage-earning employees were a comparatively small group in Ivory Coast, even in cities and, as Chapter 6 shows, consumers were far from homogenous.

Although supermarkets appeared to be even more inappropriate than small retail chains, they were aimed at a different market. The supermarkets were not an inappropriate technology because their target market was sufficiently wealthy and westernised in its consumer habits to justify these stores. Thus, a western technique was being associated with a westernised market. This was also largely true of grocery stores as the survival of the independents would suggest. The demise of the grocery chains was partly because their target consumer group - middle income Ivorians - contracted but also because they did not have the flexibility of the independents which might have enabled them to compete more successfully.

All of the above reinforce the arguments about chain store weaknesses in Ivory Coast. The advantages of economies of scale were lost through increased overheads, many of which arose from transport costs. Transport costs became a problem in large part

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<sup>230</sup> *Ibid.*, p.50.

<sup>231</sup> Hollander and Omura, 'Chain', pp.306.

because of poor store location which also was responsible partly for inadequate store turnover. This in turn was due partly to low consumer outreach. The inflexibility of the chain store operations only served to worsen the consequences of the aforementioned failings. In short, the technology was inappropriate for the environment. Finally, as Boone noted, the state's attempt to co-opt the benefits of the commercial sector for itself,<sup>232</sup> which Campbell argued has happened in other economic sectors,<sup>233</sup> led to a proliferation of stores when Chaine Avion was already struggling, thereby undermining the stated aim of Ivorianisation through both Avion and PAC. Contrary to both the radical and liberal arguments on the economy in general,<sup>234</sup> the end result of this clash between state and foreign interests was the failure of both initiatives as well as the undermining of NSE Ivorians (and other Africans) from the early 1960s to the early 1980s.

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<sup>232</sup> Boone, 'Commerce', p.67-92.

<sup>233</sup> Campbell, 'State and Capitalist Development in the Ivory Coast'. In P.Lubeck (ed.), The African Bourgeoisie (Lynne Rienner, Boulder, 1987), pp.281-300.

<sup>234</sup> Ibid; Mytelka, 'Business', pp.149-173 ; J-A.Faure and J-F.Medard, 'Classe dominante ou classe dirigeante ?'. In J-A.Fauré and J-F.Médard (eds.), Etat et bourgeoisie en Cote d'Ivoire (Karthala, Paris, 1982), pp.139-140.

## CHAPTER 5

### SUPPLIERS, PRODUCTS AND BRANDS

This chapter aims to examine the balance among suppliers between importers and manufacturers and the reasons why importers increasingly dominated luxury goods, whilst manufacturers increasingly dominated most of the volume items. The chapter also looks at the importance of brand, especially umbrella or manufacturers' brands, and at why some product groups became multi-brand whilst others did not. This also requires a look at the circumstances under which monopolies and oligopolies occur. The chapter tackles this material by first looking at the suppliers, how they operated and their respective advantages and disadvantages. Next, the extent of product distribution is assessed. Finally, the reasons why some products declined or disappeared altogether from the market are examined.

#### 5.1 PROCESSED FOOD SUPPLIERS

There were two kinds of suppliers of processed foods in Ivory Coast, local manufacturers and importers. Whilst the large majority of processed foods were imported, most of these were not found outside supermarkets. Many of the biggest selling items were at least processed in Ivory Coast even if most of the inputs were imported.

Before independence there were few manufacturing concerns and most of those were reconditioning industries related to soaps, oils, ice and the bottling of wine.<sup>1</sup> The reasons for this partly relate to the late development of the colony (as explained in the previous chapter) and partly because, unlike the colonial administration, one of the main priorities of the new government in the 1960-70

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<sup>1</sup> L. Gbagbo, 'Les entreprises coloniales en Cote d'Ivoire à la veille de la seconde guerre mondiale'. In Laboratoire 'Connaissance du tiers-monde' (ed.) Entreprises et entrepreneurs en Afrique xix et xx siècles, tome 2, (L'Harmattan, Paris, 1983), p.483; Interview: F.Coulibaly, Director of the Ecole de Commerce (Abidjan, 4 1990).

plan was import-substitution industrialisation to combat the "increasingly unfavourable terms of trade".<sup>2</sup> The first tangible sign of this new direction was evidenced during the transition phase from colonial rule to independence when Nestlé agreed in 1959 to set up instant coffee production facility under the guise of a subsidiary, Compagnie Africaine de Préparation Alimentaire et Diététique (CAPRAL).<sup>3</sup>

From the point of view of attracting other investors, the Nestlé agreement was an important vote of confidence in the new regime by one of the world's largest food manufacturers. The opportunities of a base from which to supply other West African markets and the liberal investment code (plus special concessions to CAPRAL) were two major attractions of Ivory Coast for a multinational to locate in Abidjan.<sup>4</sup> More important though was the export of raw coffee, the production of instant coffee being a secondary consideration.<sup>5</sup> The single greatest constraint on import substitution industrialisation was the size of the internal market, a limitation which the government hoped to overcome with income from the export economy and, indeed, from industrialisation itself.<sup>6</sup>

To an extent this happened for other manufacturers followed. Nestlé set up another subsidiary, Nouvelles Alimentations (NOVALIM), in 1977 which took over the manufacture of stock cubes (started in 1976) from CAPRAL.<sup>7</sup> Ivoirlait and Saprolait began production of milk products in 1963 and 1975 respectively, Abinader of sweets in 1963, and Préparations Alimentaires

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<sup>2</sup> L.R.Alschuler, Multinationals and Maldevelopment (Macmillan, Basingstoke, 1988), pp.68-71.

<sup>3</sup> J.Masini, M.Ikonicoff, C.Jedlicki and M.Lanzarotti, Multinationals and Development in Black Africa: a Case Study in Ivory Coast (Saxon House, Farnborough, 1979), pp.113.

<sup>4</sup> CCCI, Bulletin Mensuel, 2 (fev 1963), p.18; Alschuler, Maldevelopment, p.81.

<sup>5</sup> Masini et al, Black, p.115.

<sup>6</sup> Alschuler, Maldevelopment, p.71.

<sup>7</sup> Masini et al, Black, p.131; RCI, Répertoire des industries et activités de Cote d'Ivoire 1982-83 (Ministère de l'Industrie, Abidjan, 1982).

(PREPAL) of stock cubes in 1983.<sup>8</sup> There were others too, like Chocodi, Yoplait and Compagnie Ivoirienne de Produits Alimentaire (CIPA) but only one of the above, PREPAL, had a majority Ivorian shareholding (it folded in 1985).<sup>9</sup> Nonetheless, around 75% of processed food items in grocery stores in 1990 were imports.<sup>10</sup>

Manufacturing as a whole showed an impressive rate of growth in terms of Manufacturing Value Added (MVA) for the years 1965 to 1973 when it averaged 8.9% per annum but this declined to 5% between 1973 and 1984 and is estimated at just 0.9% from 1980 to 1986.<sup>11</sup> Consumer goods accounted for over 60% of production for all of this period with nearly 70% of all manufactured exports food related by 1982.<sup>12</sup>

Despite the growth in MVA, benefits to the Ivorian economy were limited by the cost of capital goods, the proportion of inputs imported, the repatriation of company profits and the cost of technical assistants. Capital goods added to the import bill and limited the creation of employment because they were high technology which meant that foreign technicians were needed. European managers, who earned 41% of total industrial wages in 1971,<sup>13</sup> repatriated large amounts of their salaries. Further, the capital intensive technology meant in some cases highly priced products because the size of the internal market made economies of scale difficult.<sup>14</sup> Finally, in a point related to what many see as the fundamental contradictions in Ivorian development policy, Alschuler argued that:

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<sup>8</sup> RCI, Répertoire 1986-87.

<sup>9</sup> Ibid; A.Dubresson, Villes et industries de Cote d'Ivoire (Karthala, Paris, 1989); Fieldwork: observation. All fieldwork references are for all the period July-December 1990 unless otherwise stated.

<sup>10</sup> Fieldwork: brand range survey.

<sup>11</sup> R.C.Riddell et al, Manufacturing Africa (James Currey, 1990), p.154.

<sup>12</sup> Ibid, pp.157-159.

<sup>13</sup> Alschuler, Maldevelopment, p.83.

<sup>14</sup> Ibid, pp.65-101; Riddell, Manufacturing, pp.152-172.

Since tariff protection eliminated competition, the foreign firms simply passed on their high production costs to the consumer in the form of high prices. The highly priced consumer goods, being beyond the reach of minimum wage agricultural labor, reinforced the initial condition of a restricted internal market.<sup>15</sup>

Putting figures to the number of processed food importers over the years is a hazardous task<sup>16</sup> but one that needs nonetheless to be attempted. In 1961-62 there were probably at most 50 processed food importers in the formal sector, 19 of which were among the 30 largest import firms. The five largest companies accounted for 44.3% of the value of food and drink imports in 1961.<sup>17</sup> There are no other figures available until 1979, the figures for which are shown in Table 18 along with other available data.

TABLE 18: ESTIMATED NUMBER OF FORMAL SECTOR FIRMS IMPORTING PROCESSED FOODS, 1979-1988

| YEAR | NUMBER |
|------|--------|
| 1979 | 43     |
| 1982 | 39     |
| 1985 | 37     |
| 1987 | 32     |
| 1988 | 28     |

Sources: RCI, Répertoire des industries et activités de Cote d'Ivoire (Ministère de l'Industrie, Abidjan, various editions 1982-89); Afrique Entreprise, 'Fichier des entreprises d'Afrique Noire' (Paris, 1979).

Most of these companies were founded before 1970 but by 1992 four of the oldest ones were forced to close. Of the 17 companies which survived the economic downturn from 1979 to 1989, the large majority were either large firms and/or also had manufacturing interests. The decline in formal sector firms over this decade occurred at the same time as a rise in the number of informal sector importers with lower operating costs and cheaper

<sup>15</sup> Alschuler, Manufacturing, p.85.

<sup>16</sup> One list of importers obtained from the Ministry of Commerce showed less than half of the companies known to exist in 1990 according to fieldwork and RCI, Répertoire 1989-90. See also Riddell, Manufacturing, p.154 regarding this problem.

<sup>17</sup> IDET-CEGOS, 'La distribution en Cote d'Ivoire' (Ministère du Plan, Abidjan, 1963), pp.18-20.

sources of supply. There are no figures available on either their numbers or the extent of their operations.<sup>18</sup> The reasons for these developments are analysed below.

There were four types of importing company according to the system of product purchasing. Most large importers used buying houses: the company wishing to import sent an order and purchases were made on its behalf. The role of the buying house was to seek out the best product at the lowest possible price, on the best possible paying conditions and within the importing company's specifications. They might also take care of shipping formalities and other paper work in the product's country of origin. The purpose was thus to ensure regular supplies at competitive prices for the importer.<sup>19</sup> Some companies such as the Compagnie Francaise d'Afrique Occidentale (CFAO)<sup>20</sup> and the Société Commerciale de l'Ouest Africain (SCOA)<sup>21</sup> had their own buying houses whilst others, especially the supermarkets, arranged to be supplied by an independent buying house.<sup>22</sup> Most of these buying houses were in Paris as many of the products purchased were French. However, CFAO had one in New York in 1946 and others served Ivorian importers from London and Rotterdam as well.<sup>23</sup> The Chaine PAC and Avion retail chains were also partially served with imports through buying houses.<sup>24</sup>

Another method of product purchasing involved a company setting up a subsidiary in Ivory Coast which then imported and

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<sup>18</sup> Interview: Claude Assouan, Directeur d'Achats at CDCI (Abidjan, December 4 1990); Personal experience: discussions with Lebanese traders and customs officials; SCIMPEX, M.Esmail, 'Rapport de la Commission 9 "Grandes Surfaces" ' (May 28 1985).

<sup>19</sup> A.Maurel, 'Les sociétés de distribution alimentaire en Cote d'Ivoire', Africa [now Africa International], 68 (Dakar, fev-mars 1974), p.45; Interview: Mr. Yace, SCOA Service d'Achats (Abidjan, December 15 1990); Mr. Kobenan, Director of SCIMPEX (Abidjan, December 10 1990); IDET-CEGOS, 'Distribution', p.21.

<sup>20</sup> H.Bonin, CFAO: cent ans de competition (Economica, Paris, 1987), p.314.

<sup>21</sup> Interview: Yace; Maurel, 'Alimentaire', p.45.

<sup>22</sup> IDET-CEGOS, 'Distribution'.

<sup>23</sup> Bonin, CFAO, p.314; IDET-CEGOS, 'Distribution', p.21.

<sup>24</sup> D.Bollinger, Le marketing en Afrique, tome 1: La Cote d'Ivoire (CEDA, Abidjan, 1977), pp.130-135.



distributed the parent company's products.<sup>25</sup> The clear advantage of this was that the producer directly controlled the marketing of its products without the heavy financial commitment involved in manufacturing. This did not mean that manufacturing would not follow later (as happened with Nestlé and stock cubes).<sup>26</sup> One other advantage was exclusivity in distribution, something which was not always respected by the head office when its goods were handled through an agent. More recent examples of foreign producers switching from agent to subsidiary distribution are Bridel milk,<sup>27</sup> formerly imported by Continentale de distribution (CODIS) and Ducros spices, previously handled by the Danish Africa Company (DANAFCO) and, before that, by the Compagnie Francaise de Cote d'Ivoire (CFCI).<sup>28</sup>

The third method of importing involved the importer being in direct contact with the overseas manufacturer. None of the literature consulted above deals with this type of operation, which may be termed 'agency importing'. In 20 years of trading in Ivory Coast since 1970, DANAFCO rarely used a buying house, relying instead on agency importing. Others which used this method include CODIS, the Société de distribution et de représentation (SODIREP) and the Société commerciale de diffusion (CODIF). Generally, agency importers were small to medium sized formal sector firms.<sup>29</sup> Initial contact between agent and supplier was either direct, in that one solicited the other, or indirect. The British and Danish embassies in Abidjan regularly received enquiries from overseas manufacturers looking for recommended agents.<sup>30</sup>

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<sup>25</sup> IDET-CEGOS, 'Distribution', p.17.

<sup>26</sup> Masini et al, Black, pp.130-131.

<sup>27</sup> Interview: Mme. Saïd, Senior Secretary at CODIS (Abidjan, October 1990).

<sup>28</sup> Personal experience: discussions with Marc Cheriaux, DANAFCO General Manager, later at Ducros (Cote d'Ivoire) (1985).

<sup>29</sup> Personal experience: discussions with Cheriaux (who used to work for CODIF); Interview: Saïd; RCI, Répertoire 1985-86.

<sup>30</sup> Fieldwork: discussion with the Commercial Attaché at the British Embassy in Abidjan (Nov 1990); Personal experience: discussions with Peter Toxvaerd, DANAFCO Director of Marketing (1984-85). He was Danish ambassador to Ivory Coast 1978-81.

Contact, direct or indirect, was usually made by the importer looking to expand range and turnover or to replace an agency just lost. Assuming that another importer already held the agency, the prospective supplier assessed the credit risk involved and set its credit conditions (usually payment 60 days from date of arrival in port, sometimes with external bank guarantee). The quantities involved and proposed marketing strategy were usually used as a means of persuading the supplier to grant an exclusive agency agreement. However, suppliers who previously had their products on the Ivorian market would often come up with their own proposals and set targets for the agent, as was frequently the case when the importer was attempting to "poach" an agency away from another importing company. This was not an uncommon practice, especially in times of economic hardship when the risks of marketing new products are higher and when strains in the relationship between agent and supplier may arise with falling sales. Examples of "poaching" include Lesieur mayonnaise (from SIFCODI to SNEM in 1990), Ovaltine (from SODIREP to DANAFCO in 1984) and, with compliments returned, Lyons tea (from DANAFCO to SODIREP in 1989). If the importer already held the agency in another country, the process was often a formality.<sup>31</sup>

Exclusivity for a product was often difficult to acquire for small companies and, more recently, even for a large company such as SCOA.<sup>32</sup> Whilst CODIS was supposedly the exclusive agent for Gervaise ice cream, Findus, Even and other brand names, the company found it impossible in practice to prevent supermarkets importing these brands themselves.<sup>33</sup> Often this was because the products came from different factories in continental Europe; one such example was Quaker cereals.<sup>34</sup>

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<sup>31</sup> Fieldwork: discussion with Bernadin Doh Gilles, Salesman at Blohorn and DANAFCO; Interview: Mr. Eric Bosteen, Chairman of West Africa Holdings, parent company of SAFA and DANAFCO (Abidjan, 1st. interview, November 15 1990); Personal experience: observation: discussions with Toxvaerd.

<sup>32</sup> Interview: Yace; Personal experience.

<sup>33</sup> Interview: Saïd.

<sup>34</sup> Personal experience: discussions with Mme Roselyn Theze, Chargés des Supermarchés at DANAFCO 1982-88 and Senior Secretary at Abinader 1988-90: observation.

The final method of import purchasing is that conducted on a non-agency basis, at irregular intervals and where the individual or company wishing to import nearly always approached the supplier. Again, there is little in the literature about this form of importing but most people in trade were well informed about these generally simple procedures which were used almost exclusively by the informal sector. Most of the products involved were multi-brand name items like tomato concentrate, sardines and cheap biscuits, often from other developing countries. There was rarely any promotional back-up for these processed foods as no long-term formal links existed between importer and supplier and nor was there usually exclusivity. A company or individual sometimes imported the product once and then never again because the supplier did not appear to be interested in having a permanent representative.<sup>35</sup>

In terms of the proportion of processed foods on the Ivorian market, the importance of buying houses decreased over time. Earlier, especially before the 1950s, the big companies dominated the market and most if not all used buying houses: the advantages of lower prices and knowledge of world markets almost made this a necessity. From the 1960s to the mid 1980s it would appear that agency importers increased in importance but from the mid 1980s non-agency irregulars began to supplant them. In addition, the proportion of goods manufactured in Ivory Coast rose fairly dramatically in the 1960s and 1970s, further decreasing the importance of buying houses.

## **5.2 THE EXTENT OF PRODUCT DISTRIBUTION**

As implied earlier, many products which were found in supermarkets and grocery stores were not available in small retail stores. The former tended to stock a wider range of product groups and more brands within each product group. A product

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<sup>35</sup> Personal experience: observation: discussions with customs officials and formal and informal sector traders; Interview: Mr. Merhouet, Junior Partner of SABIMEX (Abidjan, November 13 1990).

group is best defined by examples; biscuits, concentrated milk, coffee, breakfast cereals and tinned sardines are all products groups. A brand has been defined by Bowbrick as "a label which indicates that all products carrying a label have a common manufacturer, distributor, retailer or country of origin".<sup>36</sup> Lu, Bonnet Rouge, Nescafé, Kellogs corn flakes and Armorial are all, respectively, brands within those product groups mentioned above. However, there are different levels of brands. Umbrella and manufacturers' brands like Unilever and Nestlé were an important influence on decisions by traders whether to purchase. Main brands such as Brooke Bond and sub-brands like PG Tips can be important to the consumer. Finally, a product line denotes a particular product, for example a Nescafé 100g tin is a different product line to the 200g tin.<sup>37</sup> The purpose of these definitions will become clear later.

It is argued in this section that competition between brands in supermarkets and, to a lesser extent grocery stores, was in most instances different from that in the small retail store sector. It is also argued that, in the small retail store sector, the brand names within some product groups were important whilst in others they were not. The evidence upon which these arguments are based comes partly from fieldwork surveys of stores in nine different locales where data was collected on the stocking patterns of all stores within a certain town or district of Abidjan and partly from observation and conversations with traders during the fieldwork period and from personal experience. Other than one or two lines, earlier sources make no reference to brands stocked by stores. Consequently, the arguments pursued in this and the following section are based primarily upon evidence from the years 1983 to 1990 though reference is made to earlier years where possible. First, though, a look at the quantities of goods imported into the country.

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<sup>36</sup> P.Bowbrick, The Economics of Quality, Grades and Brands (Routledge, 1992), p.29.

<sup>37</sup> Ibid, pp.29-31.

Unfortunately, it is difficult to be precise in calculating the total value of processed food imports because of the different categories chosen by the UN and Ivorian customs. This problem was particularly acute for the years before independence but reasonably accurate estimates can nonetheless be made from 1960.

The value of food and drink as a percentage of total imports has varied from between 13% and 21.4% <sup>38</sup> of the total and averaged 16.9% from 1961 to 1969, 15.05% from 1970 to 1979 and 18.9% from 1980 to 1985.<sup>39</sup> The fall in the percentage during the 1970s was due partly to increased capital goods imports<sup>40</sup> and partly to a dramatic fall in rice imports for the years 1975 and 1976 whilst rice also accounted for a large part of the rise in the food imports percentage during the 1980s.<sup>41</sup> The proportion of processed foods in total food and live animals imports rose after 1965 as illustrated in Table 19.

TABLE 19: PROPORTION OF PROCESSED FOODS IN TOTAL FOOD AND LIVE ANIMAL IMPORTS

| YEAR | FOOD & ANIMALS | PROCESSED FOOD | PROCESSED FOOD % |
|------|----------------|----------------|------------------|
| 1965 | \$ 33,546,000  | \$ 9,319,000   | 27.8             |
| 1975 | \$ 135,535,000 | \$ 38,185,000  | 28.2             |
| 1985 | \$ 260,847,000 | \$ 83,141,000  | 31.9             |

Source: United Nations, Commodity Trade Statistics, (series D vol 15 No 27, 1965), pp.6731-6736, (series D vol 25 No 15, 1975), pp.57-60, (series D vol 35 No 14, 1985), pp.145-148. Processed food figures do not include honey, frozen meat or frozen fish. The inclusion of some processed foods used in local production (e.g. powdered milk for yoghurt product) could not be avoided.

This small rise in the proportion of processed foods was largely due to condensed milk which was by far the most important processed food import. At the same time, the imports of four of

<sup>38</sup> J.Roche, 'Le role des importations dans la consommation alimentaire en Cote d'Ivoire', Cahiers Sciences Humaines, 24, 4 (ORSTOM, 1988), p.522. For the years 1957 to 1985 only.

<sup>39</sup> Calculated from Ibid, p.523.

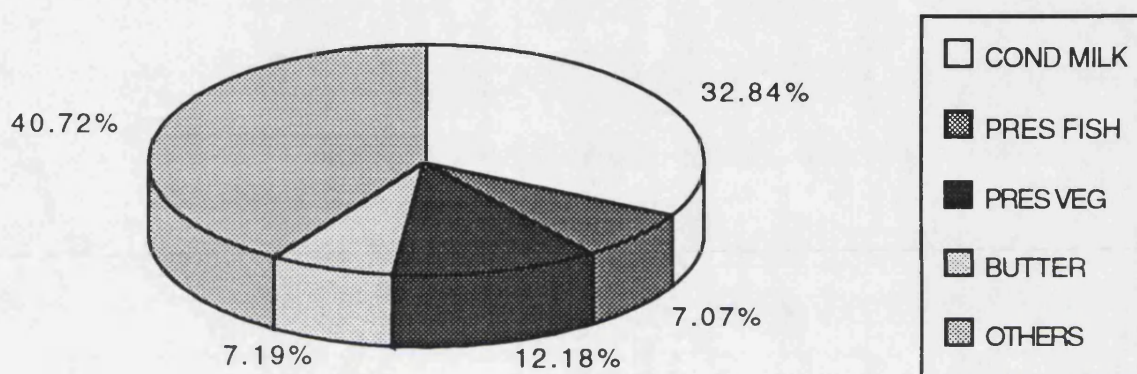
<sup>40</sup> See RCI, Statistiques Douaniers.

<sup>41</sup> Roche, 'Role', p.525. Rice alone accounted for 24% of the value of food and drink imports between 1980 and 1985.

the next most important processed foods in 1965 failed to evolve as rapidly between 1965 and 1975 whilst, by 1985, they had mostly stagnated in terms of tonnage and were in decline in terms of proportion. These developments are illustrated in the Figures 1, 2 and 3.

FIGURE 1

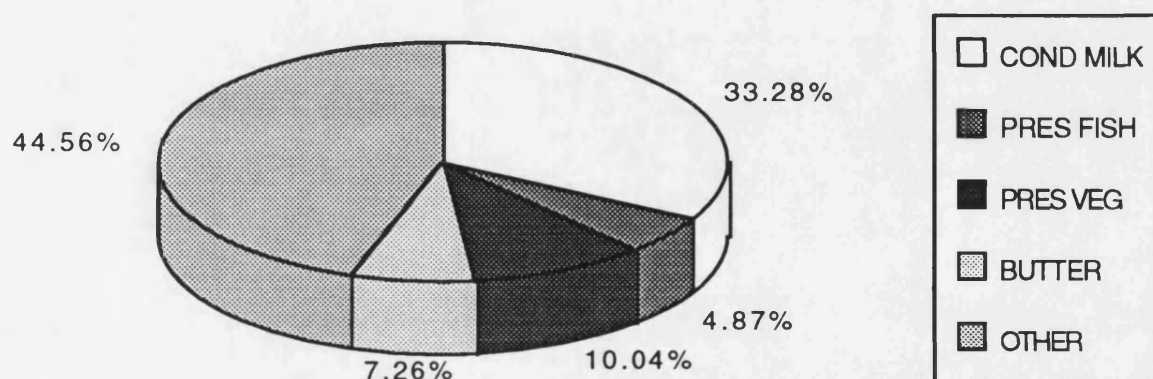
PERCENTAGE DISTRIBUTION OF THE US\$ VALUE OF PROCESSED FOOD IMPORTS, 1965



Source: Calculated from United Nations, Commodity Trade Statistics series D vol 15 N<sup>o</sup> 27 (1965), pp.6731-6736.

FIGURE 2

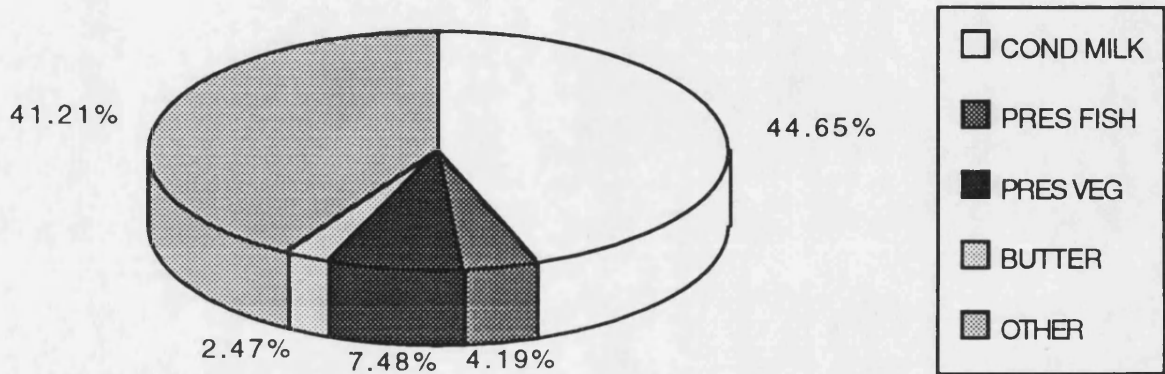
PERCENTAGE DISTRIBUTION OF THE US\$ VALUE OF PROCESSED FOOD IMPORTS, 1975



Source: Calculated from United Nations Commodity Trade Statistics series D vol 25 N<sup>o</sup> 15 (1975), pp.57-60.

FIGURE 3

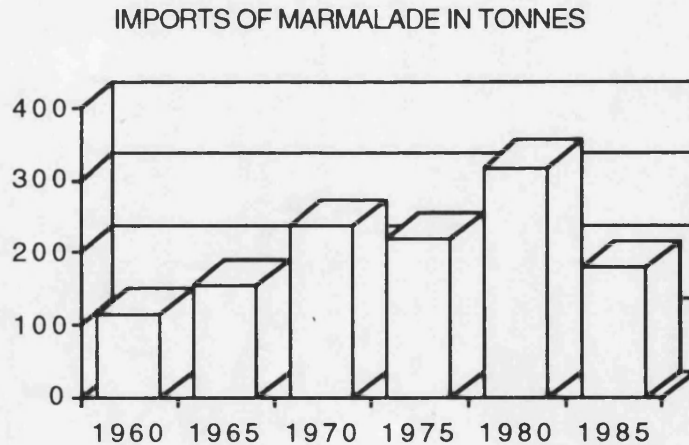
PERCENTAGE DISTRIBUTION OF THE US\$ VALUE OF PROCESSED FOOD IMPORTS 1985



Source: Calculated from United Nations Commodity Trade Statistics series D vol 35 N<sup>o</sup> 14 (1985), pp.145-148.

Figure 4 shows the evolution of marmalade imports which, like the other products in the pie charts, largely correlate to the level of GDP per capita.

FIGURE 4



Sources: RCI, Statistiques Douaniers (1960-85).

The discussion on products is divided into two parts. The first concerns those products found in all types of stores and the second those generally only in supermarkets and grocery stores. The number of processed food product lines found nationally in

the majority of all types of stores in 1990 was limited to around fifty. These fell into 12 product groups comprising approximately 20 dominant brands or sub-brands (shown in Table 20). By dominant brands it is meant brands within a product group which had a distribution coverage of at least a third of that of the group total. There was also a large number of brands and sub-brands within the 11 product groups which had a limited distribution for reasons not related to them being supermarket or grocery store products (i.e. price and luxury status were not relevant).<sup>42</sup>

TABLE 20: WIDELY DISTRIBUTED PRODUCTS, THEIR SUPPLIERS AND ORIGIN

| PRODUCT GROUP    | YEAR FIRST IN ALL STORE TYPES | 1990 DOMINANT BRANDS             | ORIGIN OF DOMINANT BRANDS | MOST RECENT SUPPLIERS   | N° of BR'DS |
|------------------|-------------------------------|----------------------------------|---------------------------|-------------------------|-------------|
| condensed milk   | probably pre WW2              | Nestlé, Geant, Granlait, B.Rouge | Holland, local, France    | Nestlé, SIALIM, SABIMEX | 15          |
| tea              | early 1960s                   | Lipton, Kettle                   | Belgium,UK                | CDCI                    | 11          |
| cubes            | 1970s ?                       | Maggi, Jumbo                     | local                     | Nestlé, CICA            | 2           |
| coffee           | early 1960s                   | Nescafé, JAG, l'Or Brun          | local                     | Nestlé, SAT, JAG        | 6           |
| biscuits         | 1950s ?                       | none                             |                           |                         | + 20        |
| tomato tins      | 1960s ?                       | none                             |                           |                         | 31          |
| chocolate powder | early 1960s                   | Nescao, CHOCODI                  | local                     | Nestlé, CHOCODI         | 5           |
| Sardines         | 1950s ?                       | Sabri, El'be, Princesse          | Morocco                   | SABIMEX, SGI            | 13          |
| margarine        | ?                             | Blue Band                        | local                     | Blohorn                 | 2           |
| baby food        | early 1970s                   | Cerelac                          | local                     | Nestlé                  | 3           |
| powdered milk    | probably pre WW2              | Nido                             | France                    | Nestlé                  | 7           |
| rolled oats      | late 1970s ?                  | Quaker                           | Holland                   | DANAFCO                 | 1           |

Sources: Fieldwork: brand range survey: discussion, Alex Adou Brou, salesman (August 8 1990); Interview: Doh Gilles (1st.): Mr N'Gozan, CFCI manager (December 12 1990); J.Masini, M.Ikonicoff, C.Jedlicki and M.Lanzarotti, Multinationals and Development in Black Africa: a Case Study in the Ivory Coast (Saxon House, Farnborough, 1979), p.126; RCI, Répertoire des industries et activités de Cote d'Ivoire 1984-85 (Ministère de l'Industrie, Abidjan, 1985); SEDES, 'Région de Korhogo. Etude de développement socio-économique' (Ministère du Plan, Abidjan, 1965).

Despite the dominance of France in other areas of trade, few of the main processed foods came from the former metropole. Most were

<sup>42</sup> Fieldwork: regional distribution survey: observation: brand range survey: PNCI, 'Produits de base pour magasins type 1 et 2'.



processed locally with largely imported inputs. Hence there was a lack of linkages. Most of the product groups show oligopolies or monopolies and these were also the areas where the most promotion and advertising activity took place. This situation reached its most extreme with the dominance of Nestlé as a manufacturing brand. It was the number one distributed brand in five of the 12 product groups and was a close second in a sixth.

TABLE 21: NUMBER OF STORES STOCKING CHOCOLATE DRINK BRANDS IN SELECTED LOCALES, 1990

| BRAND                       | Aboisso | Tieb'sou | Lakota | Guiglo | Ferke | Marcory | Attiecoubé |
|-----------------------------|---------|----------|--------|--------|-------|---------|------------|
| Nescao                      | 50      | 28       | 54     | 37     | 58    | 162     | 91         |
| Chocodi                     | 22      | 11       | 16     | 12     | 11    | 135     | 82         |
| Ovaltine                    | 17      | 5        | 3      | 4      | 8     | 66      | 21         |
| Milo                        | 14      | 0        | 2      | 0      | 19    | 19      | 10         |
| Nesquick                    | 0       | 0        | 0      | 0      | 0     | 2       | 0          |
| Total                       | 54      | 29       | 54     | 39     | 59    | 174     | 93         |
| Coverage<br>N° OF<br>STORES | 64      | 39       | 61     | 62     | 77    | 186     | 100        |

Key: Tieb'sou = Tiebessou, Ferke = Ferkessedougou,  
 Note: Marcory and Attiecoubé are districts of Abidjan.  
 Source: Fieldwork: regional distribution survey (1990).

TABLE 22: NUMBER OF STORES STOCKING COFFEE BRANDS IN SELECTED LOCALES, 1990

| BRANDS                      | Aboisso | Asseufry | Tieb'sou | Lakota | Guiglo | Ferke | Attiecoubé |
|-----------------------------|---------|----------|----------|--------|--------|-------|------------|
| Nescafé                     | 60      | 18       | 35       | 56     | 54     | 70    | 100*       |
| SAT                         | 16      | 6        | 13       | 22     | 2      | 48    | 75         |
| JAG                         | 5       | 10       | 12       | 49     | 2      | 4     | 34         |
| Dolca                       | 9       | 3        | 2        | 1      | 0      | 4     | 12         |
| GIF                         | 1       | 0        | 0        | 0      | 0      | 0     | 0          |
| Maxwell                     | 1       | 0        | 0        | 0      | 0      | 0     | 0          |
| Total                       | 61      | 20       | 37       | 59     | 54     | 76    | 100*       |
| coverage<br>N° OF<br>STORES | 64      | 20       | 39       | 61     | 62     | 77    | 100        |

Key: Tieb'sou = Tiebessou, Ferke = Ferkessedougou. \* Estimate based on 75 stores.  
 Note: Attiecoubé is a district of Abidjan.  
 Source: Fieldwork: regional distribution survey (1990).

TABLE 23: NUMBER OF STORES STOCKING BABY FOOD CEREAL BRANDS IN SELECTED LOCALES, 1990

| BRANDS                               | Asseufry | Tieb'sou | Lakota | Guiglo | Ferke | Attiecoube |
|--------------------------------------|----------|----------|--------|--------|-------|------------|
| Cerelac                              | 16       | 29       | 50     | 32     | 55    | 87         |
| Maizena                              | 0        | 0        | 0      | 1      | 0     | 0          |
| Phosphatine                          | 0        | 0        | 0      | 0      | 1     | 3          |
| Total                                | 16       | 29       | 50     | 32     | 55    | 87         |
| coverage<br>N <sup>o</sup> OF STORES | 20       | 39       | 61     | 62     | 77    | 100        |

Key: Tieb'sou = Tiebessou, Ferke = Ferkessedougou

Note: Attiecoube is a district of Abidjan.

Source: Fieldwork: regional distribution survey (1990).

Table 21 shows clearly that only two of the five brands, Nescao and Chocodi, can be regarded as having wide coverage in these locales and even Chocodi, a heavily advertised product, was weak outside Abidjan. In Table 22, the Nestlé product faced more competition but the other two leading coffee brands were clearly secondary whilst in Table 23 Nestlé effectively had a monopoly in the baby cereal market. The fact that Nestlé had so many products on the market reinforced its position with traders, the name not only being well known but the strength of some lines carrying weaker ones. Tables 21 to 23 also reveal what Table 20 hides, that there were regional differences both in brands available and overall coverage of a product group, as shown in Table 24.

The following two tables relate to tinned tomatoes. Table 24 clearly illustrates that the number of brands rendered market domination by any one brand impossible, at least without publicity, which none received. Even La Bianca, whilst being twice as popular as the next brand, failed to achieve any sort of dominance in four of the six locales. This was in part due to the large number of importers of tomatoes as some suppliers had better contacts at the wholesale level in certain areas than others. Table 25 shows that most of the importers of this product type were Lebanese and that companies tended to import several brands.

TABLE 24: OCCURRENCE OF TINNED TOMATO BRANDS IN STORES OF SELECTED LOCALES, 1990

| BRAND     | Asseufry | Tiebessou | Lakota | Guiglo | Ferke | Attiecoube |
|-----------|----------|-----------|--------|--------|-------|------------|
| La Bianco | 7        | 6         | 12     | 30     | 39    | 16         |
| Salsa     | 4        | 10        | 21     | 1      | 3     | 12         |
| Camel     | 0        | 1         | 6      | 4      | 0     | 25         |
| La Perla  | 5        | 6         | 9      | 3      | 8     | 4          |
| Rondisa   | 3        | 4         | 4      | 0      | 0     | 0          |
| Solaria   | 0        | 4         | 9      | 1      | 1     | 9          |
| Calypso   | 2        | 4         | 5      | 7      | 3     | 1          |
| Valfrutta | 2        | 3         | 4      | 0      | 6     | 5          |
| Sole Mio  | 1        | 3         | 2      | 1      | 10    | 0          |
| Russo     | 0        | 2         | 1      | 3      | 11    | 0          |
| Torro     | 1        | 0         | 5      | 1      | 1     | 8          |
| Fege      | 2        | 4         | 2      | 4      | 0     | 3          |
| All other | 7        | 13        | 25     | 14     | 14    | 8          |
| 19 brands |          |           |        |        |       |            |
| Total     | 19       | 38        | 53     | 54     | 66    | 88         |
| Coverage  |          |           |        |        |       |            |
| NUMBER    | 20       | 39        | 61     | 62     | 77    | 100        |
| OF STORES |          |           |        |        |       |            |

Key: Ferke = Ferkessedougou

Note: Attiecoube is a district of Abidjan.

Source: Fieldwork: regional distribution survey (1990).

TABLE 25: KNOWN IMPORTERS OF BRANDS OF TINNED TOMATOES, 1989-90

| IMPORTER | NATIONALITY   | BRANDS<br>IMPORTED |
|----------|---------------|--------------------|
| SABIMEX  | Lebanese      | 8                  |
| Prima    | Ivorian/Saudi | 5                  |
| SOCOCE   | Lebanese      | 3                  |
| SAEG     | Lebanese      | 2                  |
| Jonathan | Lebanese      | 2                  |
| SOGECIM  | Lebanese      | 2                  |
| SMTT     | Lebanese      | 2                  |
| CIREPCI  | Lebanese      | 2                  |
| SCOA     | French        | 2                  |

Sources: Fieldwork: brand range survey (1990); Interview: Claude Assouan, Directeur d'Achats at CFCI (Abidjan, December 4 1990); N'Gozan: Doh Gilles (1st.): Mr.Merhouet, Junior Partner of SABIMEX (Abidjan, November 13 1990).

The question naturally arises why some importers dealt in so many brands, to which there are three answers. First, many brands were of variable quality at times so importers often placed orders with more than one manufacturer if one brand turned out to be poor. Second, some sizes of a brand were unavailable so the importer found himself importing, say, two sizes of one brand and

another size from a different manufacturer. Third, prices changed rapidly so one brand was sometimes cheaper early in the year but became more expensive a few months later.<sup>43</sup>

Non-luxury processed foods of many brands were imported increasingly by the Lebanese informal sector but also by trading houses who previously had a monopoly in this area. Most of these items were from big selling product groups but there was rarely any promotional back-up and each brand often had several importers, some regular but others just occasional. The brand name was unimportant to the consumer and frequently disappeared from the market after a year or two though it sometimes reappeared several years later. This situation was typified by concentrated tomatoes in tins of which there were around 50 brands in 1990. Cheap sardines, cheap tinned peas, butter and cheap biscuits are the other main examples of many-brand non-luxury processed foods. Many of these products were imported from other Third World countries and, increasingly, from Eastern Europe.<sup>44</sup>

Many of the products in Table 21 were widely available in the 1960s but some, like Quaker<sup>45</sup> and Maggi (see Chapter 7), took several years to reach the majority of stores. Others, like Lipton, were on the verge of losing their monopoly in 1990 though they remained widely available. Some ceased to be present in more than a handful of outlets, mainly because they were too expensive as incomes continued to shrink in the latter half of the 1980s. Examples of these are Milo chocolate powder and Ovaltine.<sup>46</sup> The overall pattern however, is one of continuity. The large proportion of locally manufactured products is unsurprising as these were

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<sup>43</sup> Interview: Merhouet; Fieldwork: discussions with Lebanese traders (1990).

<sup>44</sup> Interviews: Kobenan; Merhouet; Fieldwork: observation; discussions with traders; brand range survey; Personal experience: observation; discussions with traders.

<sup>45</sup> Interview: E. Bosteen (1st.).

<sup>46</sup> Fieldwork: regional distribution survey; DSA: internal reports, L.Bosteen, 'Survey of Distribution Outlets and Ethnic/National Groups, Abidjan Town' and 'Survey of Distribution Outlets and Ethnic/National Groups - Bush Sector of Abidjan' (both 1985).

the most heavily promoted. Of the imported ones, all were heavily promoted with the exception of Le Roux chicory for which, unlike the others, there was no sole agency.<sup>47</sup>

Finally, chicory and corned beef are not multi brand but are non-luxuries which received no promotion and which, again unlike other one or few brand processed foods, were imported by the Lebanese informal sector. For corned beef, the brand name used to be important as Exeter was a mark of quality<sup>48</sup> but it priced itself out of a market which, by 1990, had only four brands.<sup>49</sup> Chicory was represented by a single brand with many importers; this market was described by one CFCI manager as a "disaster" because of large scale fraud.<sup>50</sup>

The second group of products consists of those which were found only in supermarkets and grocery stores i.e. they are luxury products. These products were usually imported either by the supermarkets themselves or by small to medium sized European owned firms with sole agency agreements. There was rarely any promotional activity and sales were small except perhaps over Christmas when some items such as Planters and Munch Kings snack foods realised a two or three million CFA turnover for the month.<sup>51</sup> Other items in this category were often aimed at specific communities, for example Marmite and Heinz Baked Beans for the 400 odd Britons<sup>52</sup> and for high earning Ghanaians.<sup>53</sup> However, such imports were high risk (legend has it that the - French - manager of one company despairingly dumped a consignment of Baked Beans in the lagoon) and were very much on the decrease

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<sup>47</sup> Interview: Assouan.

<sup>48</sup> Interview: Mr. Bernadin Doh Gilles, Salesman at Blohorn and DANAFCO (Abidjan, 2nd. interview, October 2 1990): E.Bosteen (1st.).

<sup>49</sup> Interview: Doh Gilles (2nd.); Fieldwork: regional distribution survey: product range survey.

<sup>50</sup> Interview: Assouan.

<sup>51</sup> DSA: sales ledger (1983-86).

<sup>52</sup> Personal experience: from a conversation with a senior British resident (1983).

<sup>53</sup> Personal experience: according to various Ghanaian acquaintances and store keepers (1983-84).

over the late 1980s due to the shrinkage of the expatriate community.

There are also many brand luxury items, the availability of which was usually restricted to grocery stores and supermarkets. Virtually all of these products were brand names popular in France, imported by small to medium sized European companies on a sole agency basis and aimed at the European type consumer. Such items were often promoted in stores but rarely through the media. They included tinned fruits and vegetables, cheese, high quality sardines and other tinned fish, infusions, honey, jams and breakfast cereals and formed the bulk of processed foods found in supermarkets and grocery stores.

The range of outlets in which different types of products were found is largely dealt with in the following chapter but a few general points on this issue are needed here as they were important to decision making in the purchase of products. The extent of distribution depended basically on two factors: the type of product and the resources of the importer/manufacturer. Road conditions are all-important for fragile processed foods so towns which could be reached by tarmac roads were more likely to have a variety of brands and product types. The growth of the tarmac road network since the 1950s<sup>54</sup> (see Maps 1 to 3 in Chapter 1) thus greatly facilitated the expansion of product availability in many areas of the country. Other products required refrigeration during transport and this meant a considerable investment in specialised lorries, an investment which often only the bigger companies could afford to make.

### **5.3 THE DECLINE AND DISAPPEARANCE OF PRODUCTS**

Of the many factors which were responsible for the disappearance of products from the market, some have already been hinted at in the above paragraphs. Processed foods which were manufactured

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<sup>54</sup> ORSTOM and IGT, Atlas de Cote d'Ivoire (Ministère du Plan, Abidjan, 1979), section D2a.

in Ivory Coast were probably the least likely to disappear, followed by those imported by multinationals. The reason for this seems fairly clear in that, unless market demand changed dramatically, multinationals were unlikely to drop their own products and were not susceptible to the market being undermined by a supplier failing to respect exclusivity. The main threat thus came from competition but here too they were at an advantage for they possessed the financial resources to out-advertise and out-price cut almost all competition. Thus the only multinational processed foods which were likely to disappear from the market were those which the parent company ceased to produce or, during an economic downturn, which were luxury items. Multinational processed foods apart, most other products were vulnerable to a large number of factors relating to anything from performance of the economy to fraudulent imports to supplier-agent disputes.

Probably the biggest reason for product disappearance over the last five years covered by the thesis was excessive competition from imports which were much cheaper than similar existing brands. This was due to either dumping, customs fraud or, more simply, access to suppliers with highly competitive products. Dumping was cited by the supermarkets as being one reason why their turnover declined though this concerned mainly basic products<sup>55</sup> which were not as important to supermarkets as to smaller outlets. Imports involving customs fraud were equally resented by the WSE/formal sector and led to some products disappearing because they could not compete on price. Laicran milk powder, Torro tomatoes and Globus peas were all dropped by CFCI for this reason.<sup>56</sup>

For some sections of the market, cheap alternative sources of supply were even more devastating to existing products. The most obvious example is biscuits from South Africa.<sup>57</sup> The Lebanese were the main 'culprits' here though in fairness they merely took

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<sup>55</sup> SCIMPEX, 'Commission' p.2.

<sup>56</sup> Interview: Assouan.

<sup>57</sup> Fieldwork: brand range survey.

advantage of a relaxation in trade sanctions to supply the generally high quality biscuits<sup>58</sup> which many Ivorians would otherwise not have been able to afford. As a result of these cheap imports, CODIF, a major biscuit importer, went into receivership in 1990<sup>59</sup> whilst DANAFCO, since 1989, stopped importing over half of its 20 odd lines of Oxford biscuits.<sup>60</sup> Even prior to the cheap South African imports, there was fierce competition in the biscuit market. Nevertheless, in 1990, after some five years of cheap imports, the Nour Al Hayat supermarket still stocked over 100 different types of biscuit representing nearly 100 brand names of non-South African origin.<sup>61</sup> Similarly, in the market for teabags, Liptons held sway from the early 1980s but a comparison between outlet surveys conducted in 1985<sup>62</sup> and 1990<sup>63</sup> seems to indicate that it was latterly suffering from an influx of cheap competitors.

Excessive competition was not just be caused by price but also by the arrival of otherwise more attractive products or through heavy advertising. The Jumbo cube saw its market share fall in the mid to late 1980s because the manufacturer was unwilling to compete with Nestlé in advertising expenditure and Lyons tea suffered a similar fate at the hands of Liptons in the early 1980s despite a much lower public retail price.<sup>64</sup> The SCOA supermarket group had a policy of suppressing one brand if a more attractive (better quality, better known, cheaper etc) rival brand became available.<sup>65</sup>

Some products also disappeared or experienced sharp falls in turnover due to price rises beyond that of similar products as

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<sup>58</sup> Fieldwork: observation.

<sup>59</sup> Interview: Mr. Frederick Attoh, DANAFCO General Manager (Abidjan, September 1990).

<sup>60</sup> DSA: stock ledger (1989-90).

<sup>61</sup> Fieldwork: product range survey.

<sup>62</sup> DSA: internal reports, L.Bosteen, 'Abidjan Town' and 'Bush Sector'.

<sup>63</sup> Fieldwork: regional distribution survey.

<sup>64</sup> Interview: E. Bosteen (1st.); Fieldwork: observation; Personal experience: observation.

<sup>65</sup> Interview: Mr. M.Anthony, Director of the Score group (Abidjan, November 1990).



opposed to the sudden importation of cheaper produce. One such product was Exeter corned beef in the late 1970s<sup>66</sup> which is no longer available.<sup>67</sup> The Royal Brand of custard powder also disappeared though price was not the only reason.<sup>68</sup> Price also played a part in the failure of the Jumbo fish cube (discussed in more detail later)<sup>69</sup> but for some products demand was less elastic. Kjeldsen's buttercookies from Denmark and Quaker honey from Holland both experienced sharp price rises in the early 1980s without any fall off in sales because they were products aimed at wealthy consumers.<sup>70</sup>

A decline in sales caused by price rises, or any other factor for that matter, could also lead to a product disappearing because orders no longer filled a container, even though sales may have been sufficient to ensure a profit. Filling a container could be a major problem for luxury products of non-French or Dutch origin as there were fewer possibilities for combining products to fill a container. Several lines of Ota breakfast cereals disappeared in 1988 when that company switched production of items to France: the remaining Danish-produced cereals did not sell well enough to justify importation by the container load whilst shipping by palatte proved too expensive.<sup>71</sup>

Other problems could arise from suppliers switching countries, especially where the management was concerned. Klim milk powder used to be imported from Denmark by DANAFCO in 1979<sup>72</sup> but in 1981 production was switched to South Africa. The South African management refused to accept that the agent had blacks amongst their management, some of whom were

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<sup>66</sup> Interview: Doh Gilles.

<sup>67</sup> Fieldwork: regional distribution survey: product range survey. A product of French origin, Ester, has tried to exploit the Exeter brand name which had a reputation for quality.

<sup>68</sup> DSA: stock ledger (1984); Personal experience: I was involved in the liquidation of the final stocks of this product.

<sup>69</sup> DSA: stock ledger (1985-88); Personal experience: discussions with traders (1985).

<sup>70</sup> DSA: stock ledger (1983-86).

<sup>71</sup> DSA: stock ledger (1988); Personal experience: discussions with Theze.

<sup>72</sup> DSA: stock ledger (1979): import licenses (1979).

responsible for the marketing of their product and demanded that whites be put in charge. DANAFCO refused and dropped Klim from its list of imports.<sup>73</sup> Standard Brands was another company that moved one of its subsidiaries' management, this time from Liverpool to Athens in 1980. The Greek management proceeded to raise prices and ship its Royal custard and Baking powder to anyone who wanted, thereby breaking its agency agreement. The end result was that the agent ceased importing and, four years later, the Royal brand was no longer available in Ivory Coast.<sup>74</sup>

However, a change in management did not always lead to a product disappearing but it may have meant a reassessment of the agent's performance, leading to a change in importers. Alternatively, company politics rather than performance may have been the deciding factor, as was the case with Lipton tea. From 1981 to 1989 SODIREP marketed this brand with great success, displacing Lyons and Kettle as the dominant brand<sup>75</sup> but in the latter year Unilever bought Liptons and gave the agency to Blohorn, another of its subsidiaries.<sup>76</sup> Unilever also tried to wrest the Quaker agency from DANAFCO for CFCI in the early 1980s by threatening to cease distributing in the Middle East where it held the agency through yet another subsidiary. Having worked with DANAFCO for over 15 years and being more than satisfied with the agent's performance in West Africa, Quaker refused but had to ship small quantities to CFCI as a concession.<sup>77</sup>

Good relations between supplier and agent were often essential to the success of a product and this includes suppliers being willing to invest in promoting products which showed potential. Quaker and DANAFCO both benefitted from a cordial relationship and mutual understanding of each others problems. This was not the case between Wander and SODIREP, respectively supplier and importer of Ovaltine until 1984 when Wander tired of throwing

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<sup>73</sup> Interview: E.Bosteen (1st.).

<sup>74</sup> Ibid; Personal experience: discussion with Cheriaux (1984).

<sup>75</sup> Interview: Doh Gilles (2nd.).

<sup>76</sup> Interview: E.Bosteen (1st.).

<sup>77</sup> Ibid; Personal experience: discussions with Ian Trier, Quaker Special Markets Division (1984-85).

money at the product with no noticeable results and changed agents.<sup>78</sup> Bad relations also existed between United Biscuits and DANAFCO due to the former continually sending biscuits from their old stock, the expiry dates leaving the agent only a month or two to sell the stock. The agent eventually tired of this and stopped importing in 1985.<sup>79</sup> Unlike Wander though, United Biscuits failed (or did not try) to find another agent.<sup>80</sup>

A change in packing could also adversely affect a product as was the case with Standard Brands' Lion baking powder and Lyons' bakery products.<sup>81</sup> Alternatively, it could prove spectacularly successful as illustrated by the Jumbo cube though Ovaltine, Lipton and Lyons were apparently unaffected by change. There was often little an agent could do if a supplier decided to change the product design as the Ivorian market was rarely significant enough to merit consideration. Likewise, some products which sold well in Ivory Coast disappeared because the supplier ceased production due to lack of sales on the world market. Cessation of production, though, would appear to have been more common where local manufacturers were concerned, the best known examples being PREPAL's Tanti cube in 1985<sup>82</sup> and REK pasteurised milk sometime after 1986.<sup>83</sup> Alternatively, a product could disappear because the importer closed down, as was the case with Coast concentrated milk in 1980.<sup>84</sup>

Finally, and a factor which became increasingly important, suppliers sometimes set credit conditions with which no agent felt able to comply. Kerrygold, after suffering heavy losses through fraud along the coast, required external guarantees and granted a

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<sup>78</sup> Personal experience: discussions with Peter Kingsberger, Wander Regional Manger (1984-85).

<sup>79</sup> DSA: telexes between DANAFCO and United Biscuits (1985); Personal experience: I was responsible for disposing of the stock (1985).

<sup>80</sup> Fieldwork: observation.

<sup>81</sup> Interview: E.Bosteen (1st.).

<sup>82</sup> Dubresson, Villes.

<sup>83</sup> Fieldwork: observation.

<sup>84</sup> Interview: Doh Gilles (2nd.).

limited credit period.<sup>85</sup> This lack of confidence undoubtedly also stemmed from the economic climate when, in addition to agents who would not pay, suppliers also had to take into account those which suddenly found they could not pay.

If most of the examples given above are recent, this is not just due to a scarcity of sources for earlier periods. Two of the main reasons for product disappearance or declining sales, fraud and cheap alternative supplies, are recent phenomena probably linked to the decline of the economy during the last decade. This latter was the cause of much supplier-agent friction with the former not always prepared to accept that declining sales were not the fault of the latter. Further, competition greatly intensified over the years due to the increased variety of products available<sup>86</sup> and this, combined with the economic decline, inevitably led to a higher 'casualty rate'. When (hopefully rather than if) the economy improves and consumer resources rise again, the casualty rate should decline though by how much may depend on the rate of increase in fraud.

#### 5.4 CONCLUSION

There are a number of factors which have determined the survival of some products against the failure of others. Chief amongst these is consumer demand (dealt with more thoroughly in the next two chapters) which enabled the product to sustain sufficient turnover to enable local manufacture and/or heavy promotional support. Attaining the stage of local manufacture can be seen as crucial for the investment involved almost certainly meant a sustained effort to keep the product a market leader within its product group. If this effort subsequently led to monopoly control then the presence of the product on the Ivorian market was further secured. In the case of Nestlé, monopoly or

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<sup>85</sup> Interview: Mr. Eric Bosteen, Chairman of West Africa Holdings, parent company of SAFA and DANAFICO (Cahors, France, 2nd. interview, February 9 1992).

<sup>86</sup> Interview: Doh Gilles (2nd.); Personal experience: discussions with traders.

oligopoly markets were further strengthened by the number of brands and the power the company could wield over traders - hence the benefits of umbrella brands.

The increasing dominance of Nestlé and Unilever (margarine, many soap product lines, oils, etc) and the rapid decline since the mid 1980s of formal sector importing companies left Lebanese traders, with their extensive and increasing interests in the importation of cheap goods on which duties were frequently evaded, as the only bulwark against this multinational dominance. Their power in trade is well illustrated by the fact that they were largely responsible for the demise of many small, formal sector, importing companies whose products were increasingly the victims of cheaper alternatives. Both the Lebanese and the two big multinationals had a further advantage over the competition in that they were well connected to the ruling elite.

The continued existence of product lines with little promotional support is more difficult to explain but most instances occurred where other lines within the product group also lacked promotional support and most were handled by Lebanese interests which had strong contacts at the wholesale level. The best example here is the tinned tomato product group. Products handled by large companies held an additional advantage in that they were less likely to disappear due to the company closing down but it is debateable whether this remained true in the late 1980s.

For supermarket lines, the presence of a large French community determined that most brands would be ones familiar to French consumers i.e. mainly French brands. Supermarkets in Ivory Coast mostly stocked brands which were familiar to French consumers and the fact that French labelling was required by most supermarkets decreased the likelihood of unfamiliar products appearing. However, it was noted that baked beans were specially imported with the Anglophone community in mind.

The sales volume of many items, even with prospects for exporting to neighbouring countries, did not justify the capital investments involved in setting up a local manufacturing plant. With many luxury items consumed mostly by Europeans, and with few if any local raw materials, the local manufacture of breakfast cereals, corned beef and the like held few economic incentives. That bulk items such as milk, tinned tomatoes and sardines were mostly imported was due probably to the lack of local resources and/or the very low FOB price. The local manufacture of chocolate derivatives, sweets, instant coffee and yoghurts was favoured by the size of the internal market, prospects for regional exports, no or few cheap imports, and/or the availability of local raw materials. Whilst the market for instant coffee was small when Nestlé started CAPRAL as a local manufacturer, government sweeteners, the abundance of a local raw material and the potential for regional exports made the investment worthwhile in the long term. In summary, decisions to manufacture locally or to import were based mostly on economies of scale, government incentives, regional export potential and local raw materials.

## CHAPTER 6

### CONSUMER DEMAND AND PROCESSED FOODS

Since the evolution of trading companies and stores was closely linked to the demand for the products they sold, the analysis of entrepreneurs and the determinants governing processed foods supplied remains incomplete without an assessment of the extent of that demand. The vigorous economic climate from the 1950s to the late 1970s, of which traders were an important part, contributed to the rapid population growth by enticing foreign migrants to Ivory Coast. Commercial activities also contributed to increased purchasing power and entrepreneurs attempted to augment demand through marketing.

The factors determining consumer demand in any country are many and complex. The first elements of demand revealed are population and income. This is followed by looking at the less easily measured determinants which fall into two broad groups. The first, exogenous factors, were urbanisation, indigenous eating habits, working environment, level of education, media penetration, income distribution, transport and the distribution network. In the second group, induced demand, the factors come under two headings: product attributes (price, packing, nutritional value, novelty, convenience, status and taste) and marketing (advertising, field promotions, sponsoring and point of sale or product placement by salesmen). In addition, word of mouth may be an effective marketing tool for exploiting product attributes but is not always induced by the marketer.<sup>1</sup>

The rest of the chapter is divided into five sections. The first provides an overview of consumption, examining potential and actual demand by looking at population, income and imports as

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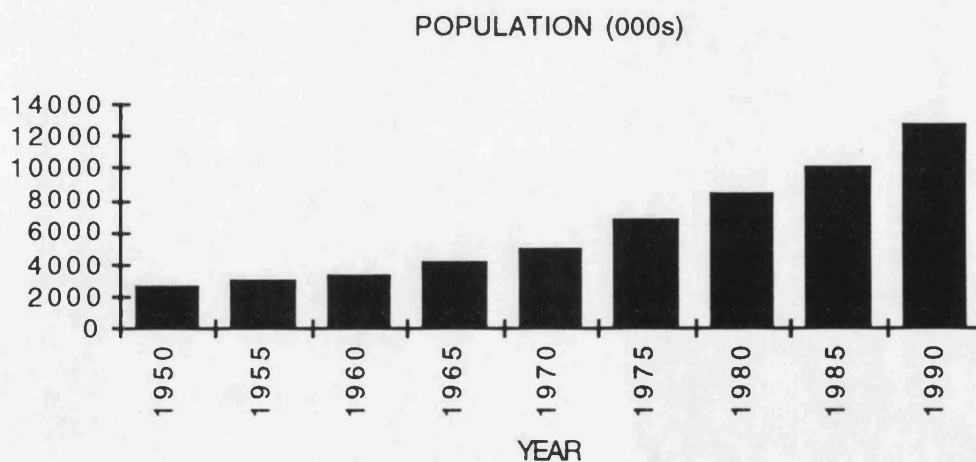
<sup>1</sup> Some aspects of this model were derived from a study on Argentine beef imports in B.Y.Kouassi, 'Toward an Adoption Decision Model for Processed Foods in Developing Nations' (Discussion paper No.110, Centre for Research on Economic Development, University of Michigan, Ann Arbor, November 1984), and from W.O.Jones and C.Merat, 'Consumption of Exotic Consumer Goods as an Indicator of Economic Achievement in Ten Countries of Tropical Africa', Food Research Institute Studies, 3, 1 (February 1962), p.44.

well as the extent of processed food demand in relation to total food consumption. The second section takes the analysis a step further by assessing the relationship between urbanisation, income distribution and processed food demand. The third section analyses the reasons for higher consumption in urban areas and high income groups and the fourth looks at demand induced by marketing activities. Finally, the conclusion summarises the main findings of the chapter.

### 6.1 EXTENT OF DEMAND: AN OVERVIEW

Population size is probably the simplest measure of a market's potential. Since 1950, Ivory Coast has experienced one of the most rapid growths in population in the world. Between 1975 and 1988 the population grew at an annual rate of 3.8%.<sup>2</sup> Figure 5 shows the evolution of the population from 1950 to 1990, revealing an increase in the number of mouths to feed by a factor of around four and a half.

FIGURE 5: IVORY COAST POPULATION, 1950-90



Sources: World Bank, World Tables 1983, vol 2, p.47; World Tables 1988-89, pp.212-213; EIU, Cote d'Ivoire Country Report, (No.3, 1991), p.3.

With foreigners (mostly Malians and Burkinabes) accounting for 21.3% of the total population in 1975, Ivory Coast had the highest

<sup>2</sup> EIU, Cote d'Ivoire Country Profile 1993/94, p.9.



proportion of any West African country. More than half of all immigrants were in the south<sup>3</sup> and by 1988 the proportion of foreigners had risen to 28%, putting the annual rate of immigration at 6% since 1975. The rapid population growth has also been due to an increase in the average life expectancy from 33 years in 1958 to 56 years in 1988.<sup>4</sup>

The European population grew from 7,963 in 1951<sup>5</sup> to 14,000 in 1955<sup>6</sup> and around 65,000 in the early to mid 1980s.<sup>7</sup> The French component rose from 28,000 in the late 1960s to 44,000 in the 1970s but had declined to 23,000 by early 1991.<sup>8</sup> The vast majority worked for trading companies, in industry or as technical assistants in the French aid programme. The Lebanese population numbered 1,344 in 1951,<sup>9</sup> over 2,000 in 1953 and 7,000 in 1965.<sup>10</sup> By 1970 there were around 20,000 Lebanese.<sup>11</sup> Estimates after this vary enormously, from 60,000 (1990)<sup>12</sup> to 300,000 (1989).<sup>13</sup> The lack of accurate statistics was probably due to political reasons and/or the frequency with which many entered and left the country. The most accurate guess one can make from the sources available that there were between 85,000 and 120,000 by the late 1980s.<sup>14</sup>

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<sup>3</sup> K.C.Zachariah and J.Conde, Migration in West Africa (World Bank, New York, 1981), pp.35-37.

<sup>4</sup> EIU, Profile 1993-94, p.9.

<sup>5</sup> AOF, Recensement de la population non-autochtone de l'AOF en juin 1951 (Service de la Statistique, Dakar, 1951), p.9.

<sup>6</sup> AOF, Annuaire statistique de l'AOF, 5, 1 (Direction des Services de la Statistique Général et de la Mécanographie, Paris, 1956), p.45.

<sup>7</sup> P.Lubeck, 'The African Bourgeoisie: Debates, Methods and Units of Analysis'. In P.Lubeck (ed.), The African Bourgeoisie (Lynne Rienner, Boulder, 1987), p.21.

<sup>8</sup> ARB (Political Series), 28, 4 (April 1991), p.10103.

<sup>9</sup> AOF, Recensement, p.9.

<sup>10</sup> D.Bigo, 'The Lebanese Community in the Ivory Coast: a Non-native Network at the Heart of Power?' In A.Hourani and N.Shehadi (eds.), The Lebanese in the World: a Century of Emigration (Centre for Lebanese Studies, 1992), pp.513-514.

<sup>11</sup> R.J.Mundt, Historical Dictionary of the Ivory Coast, (Scarecrow Press, Metuchen, 1987) p.96.

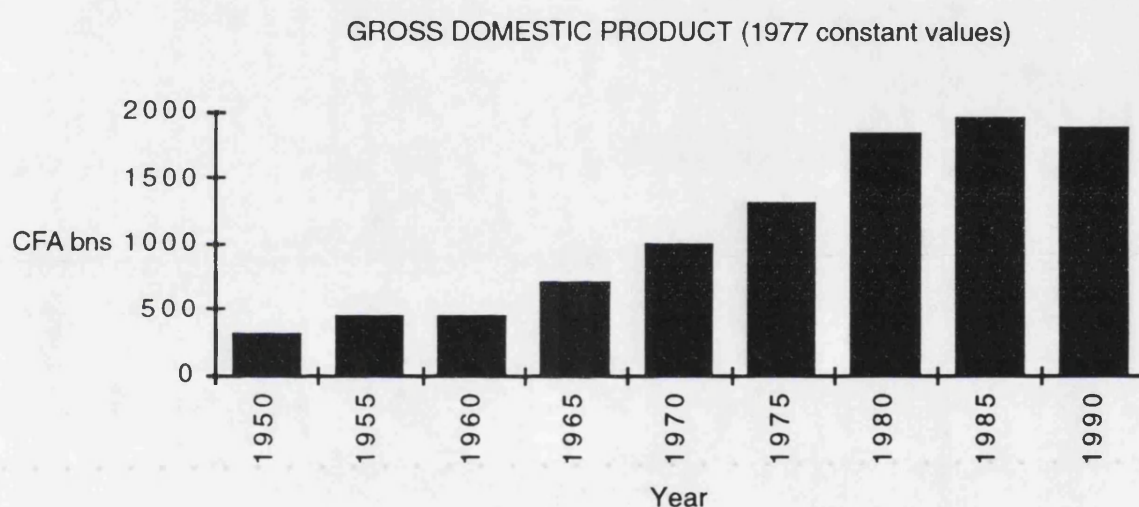
<sup>12</sup> Bigo, 'Network', p.516. Figure given by the Union Libanaise Mondiale en Cote d'Ivoire.

<sup>13</sup> EIU, Profile 1989-1990, p.8. Originally quoted in Le Monde newspaper.

<sup>14</sup> Bigo, 'Network'; EIU, Cote d'Ivoire Country Report, (No. 1, 1990). The

The other main factor affecting potential market size is income. Figure 6 shows the evolution of gross domestic product in 1977 constant values and indicates an impressive growth rate up to 1980. Despite a decline over the period 1985 to 1990, the extent of purchasing power for the economy as a whole in real terms still comfortably exceeded that of the boom years during the 1970s.

FIGURE 6: IVORY COAST GROSS DOMESTIC PRODUCT, 1950-90



Sources: World Bank, World Tables 1983, vol 1, pp.94-95; World Tables 1988-89, pp.212-213; EIU, Report (No.3, 1991), p.3.

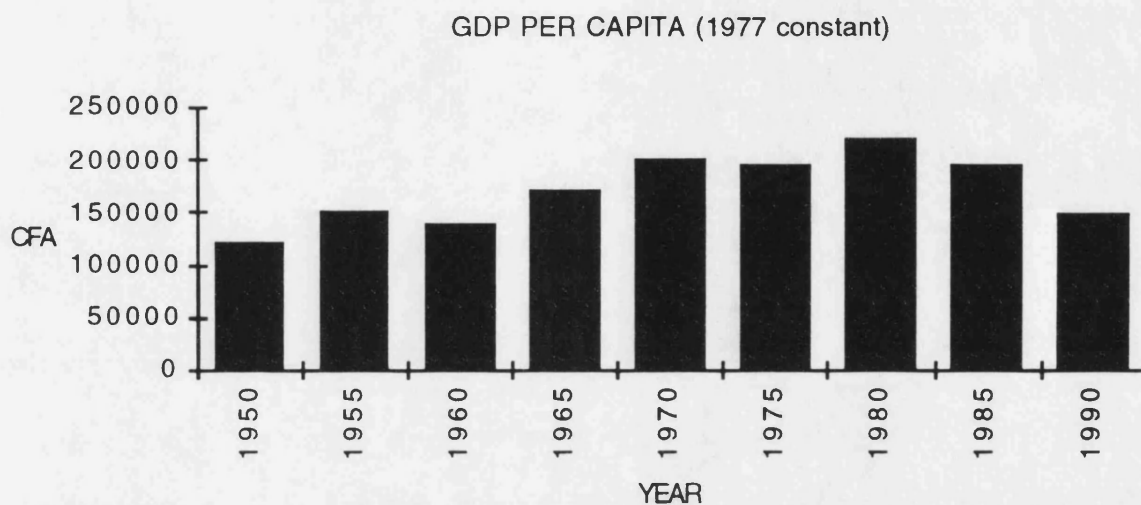
The pattern of GDP per capita growth was rather less consistent, due partly to the population increases illustrated in Figure 5. Whilst income per head rose, in constant terms, from CFA 120,600 in 1950 to 149,080 in 1990, this latter figure was less than that of 1955 and a far cry from the roughly CFA 200,000 of 1980.<sup>15</sup>

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latter figure was also given to Mr M.Cheriaux (DANAFCO general manager until 1989) by a Lebanese acquaintance with contacts at the embassy.  
Fieldwork: conversation.

<sup>15</sup> Calculated from: World Bank, World Tables 1983, vol 1, pp.94-95; vol 2, p.47; World Bank, World Tables 1988-89, pp.212-213; EIU, Report (No.3, 1991), p.3.

FIGURE 7: IVORY COAST GROSS DOMESTIC PRODUCT PER CAPITA, 1950-90



Sources: Calculated from: World Bank, World Tables 1983, vol 1, pp.94-95; vol 2, p.47; World Tables 1988-89, pp.212-213; EIU, Report (No.3, 1991), p.3.

Whilst increases in GDP and population do not automatically lead to an increase in processed food consumption, the figures suggested a potentially growing market for processed foods, at least up to 1980. From 1980 to 1990, the population continued to increase and so too, for a while, did GDP, also suggesting an expanding market despite a decrease in income per head. After 1985, GDP declined and, despite the continuing population increase, processed food consumption probably fell or at best remained stagnant. One way of verifying these assumptions is to look at imports and imports per head.

Figures presented in Chapter 5 showed that the value of processed food imports rose from US\$ 9,319,000 in 1965 to US\$ 260,847,000 in 1985, evidence of a substantial increase in consumption even accounting for fluctuating exchange rates and rising prices. Table 26 below, using weight rather than value, confirms this trend and shows a decline or stagnation in imports over part or all of the 1980s.

TABLE 26: AVERAGE ANNUAL IMPORTS IN TONNES OF SELECTED PROCESSED FOODS

| PERIOD  | BUTTER | TINNED<br>SARDINES | HONEY | PRESERVED<br>MEAT | CONCENTRATED<br>MILK |
|---------|--------|--------------------|-------|-------------------|----------------------|
| 1956-60 | 273    | 881                |       | 386               | 2989                 |
| 1961-65 | 488    | 767                | 6     | 451               | 5629                 |
| 1966-70 | 1530   | 910                | 12    | 634               | 11022                |
| 1971-75 | 1404   | 1208               | 13    | 783               | 16776                |
| 1976-80 | 3004   | 2278               | 16    | 1066              | 38337                |
| 1981-85 | 1808   | 2550               | 16    | 804               | 40818                |
| 1986-88 | 2316   | 2306               | 18    |                   | 45317                |

Sources: RCI, Statistiques Douaniers; UN, Commodity Trade Statistics; AOF, Bulletin mensuel de statistique d'outre-mer (1959); FAO, Trade Yearbook; UN, Yearbook of International Trade Statistics.

Given that the population increased, the above data would suggest that imports after 1980 were affected not only by declining income per head but also by the decline in Ivory Coast's GDP. Table 27 shows the level of imports in Kgs per thousand of population for selected products.

TABLE 27: AVERAGE ANNUAL IMPORTS IN KILOS PER THOUSAND OF POPULATION OF SELECTED PROCESSED FOODS

| PERIOD  | CONCENTRATED<br>MILK | PRESERVED<br>MEAT | PRESERVED<br>VEGETABLES | JAM &<br>MARMALADE | BLACK<br>TEA |
|---------|----------------------|-------------------|-------------------------|--------------------|--------------|
| 1956-60 | 941                  | 117               |                         | 29                 | 7            |
| 1961-65 | 1482                 | 119               | 710                     | 34                 | 13           |
| 1966-70 | 2348                 | 135               | 885                     | 42                 | 13           |
| 1971-75 | 2807                 | 131               | 992                     | 36                 | 9            |
| 1976-80 | 4985                 | 142               | 1177                    | 37                 | 14           |
| 1981-85 | 4378                 | 88                | 1128                    | 25                 | 12           |
| 1986-88 | 4201                 |                   |                         | 21                 | 9            |

Sources: UN, Demographic Yearbook: Historical Supplement (1979); World Bank, World Tables 1987, pp.112-113; EIU, Report (No.3, 1991), p.2; RCI, Statistiques Douaniers; UN, Commodity Trade Statistics; AOF, Bulletin mensuel; FAO, Trade Yearbook; UN, Yearbook; RCI, Recensement 1988.

Assuming imports to be an accurate reflection of consumption, this table reinforces the evidence that changes in consumer purchasing power do influence the consumption of processed foods. In the words of Jones and Merat,

Consumer goods can probably be arranged in a progression or hierarchy, with a basic set that is purchased by most persons, and progressively higher-ranking commodities which are purchased with each increase in income, or which become a part of the standard, if not the level, of living as income rises.<sup>16</sup>

Imports per head generally rose between 1956-60 and 1976-80. After 1980, all five products show a decline. These trends mirror those of income per capita. Further, the data enable a tentative model of a hierarchy of goods. The product with the widest distribution, concentrated milk, showed the least decline whilst the one with the narrowest distribution, jam, showed the greatest. In between these products came tea, preserved vegetables and preserved meat.

It remains only to assess the validity of using imports as an accurate indicator of consumption. Imports may be distorted by false declarations and cross border smuggling. European companies have long accused Lebanese importers of bribing customs officials but there is little hard evidence.<sup>17</sup> It seems unlikely though that basic processed foods such as milk products, tomato puree and sardines were falsely declared as import duties on these items were very low.

On smuggling, Garlick asserted that fairly large quantities of goods passed both ways over the Ivory Coast - Ghana border in the late 1950s but none of the products mentioned were processed foods.<sup>18</sup> In 1985 the Ivorian government announced an anti-smuggling drive but the goods were in-coming clothes and shoes.<sup>19</sup> Also in 1985, attempts by one company to sell tea across the Ghana border were unsuccessful as there was no demand. However, unknown quantities of chocolate drinks and Quaker oats did pass into Ghana in the early to mid 1980s<sup>20</sup> despite the border

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<sup>16</sup> Jones and Merat, 'Exotic', p.44.

<sup>17</sup> Interview: Mr. Claude Assouan, Directeur d'Achats at CDCI, (Abidjan, December 4 1990); ARB (Political series), 27, 5 (June 1990), p.9694; SCIMPEX, M.Esmail, 'Rapport de la commission 9 "Grandes surfaces" ' (Abidjan, 1985).

<sup>18</sup> P.Garlick, 'The French Trade de Nouveau', Economic Bulletin of Ghana (1st series), 3, 2 (Feb 1959). pp.16-26.

<sup>19</sup> ARB (Economic series), 22, 5 (June 1985), pp.7758-7759.

<sup>20</sup> Personal experience: discussions with traders in Abidjan, Aboisso and

being closed by Ghana at various times to combat smuggling.<sup>21</sup> Generally, though, goods could be smuggled into Ghana cheaper from Togo than from Ivory Coast.<sup>22</sup>

The products in Tables 26 and 27 were selected on the likelihood of their having been smuggled or declared falsely at customs. Some were low duty items and others high priced luxuries for which there was limited market whilst butter, with its need for cold storage, would be very difficult to smuggle. The figures may not be perfect but the evidence there is suggests that they are a reasonably accurate reflection of actual consumption within the borders of Ivory Coast.

The extent to which processed foods were used in 1982 compared to more traditional foods is illustrated by Figure 8 based on a survey conducted by Ajanohoun of 45,266 products which were found to be used in the preparation of dishes.<sup>23</sup> He outlined three types of products. Type 1, modern, are those which were part of the European diet and not in decline in the west. Type 2, traditional, are those traditionally consumed in Ivory Coast and which did not undergo major changes and did not involve the use of a significant proportion of modern or transitional products. Type 3, transitional, consists of all other products.

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Agnibilekro (1985): observation of goods in Accra (1986).

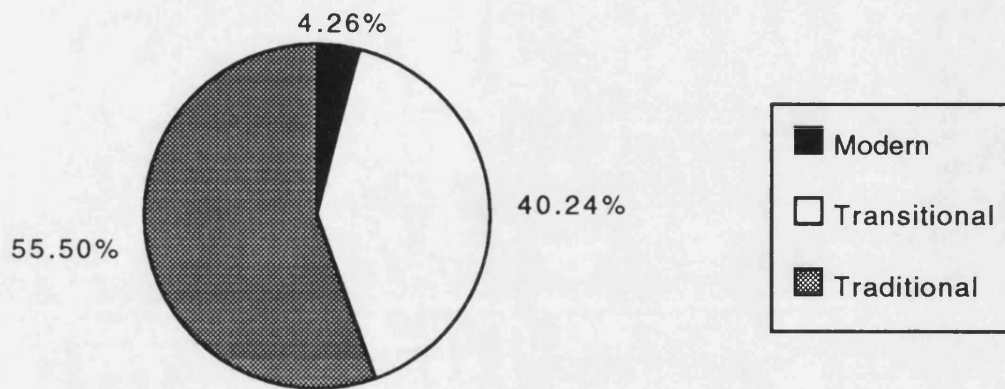
<sup>21</sup> ARB (Political Series), 19, 10 (Oct 1982) p.6612: 20, 12 (Jan 1984), p.7065.

<sup>22</sup> Personal experience: discussions with J.Ayirebi, DANAFCO General Manager in Togo (1986), E.Bosteen, Chairman of DANAFCO, and P.Toxvaerd, DANAFCO Director of Marketing (1984-85). All future references to Personal experience are for all of the periods 1983-85 and 1986 unless otherwise stated.

<sup>23</sup> G.A.Ajanohoun, 'Développement de la marchandise alimentaire en Cote d'Ivoire' (Mémoire pour l'obtention du diplôme d'études approfondies en développement et commerce international, Faculté Sciences Economiques, Université d'Abidjan, 1982), pp.53-54.

FIGURE 8

TYPES OF PRODUCTS USED IN DISHES (1982)



Source: G.A.Ajanohoun, 'Développement de la Marchandise alimentaire en Cote d'Ivoire' (Mémoire pour l'obtention du diplôme d'études approfondies en développement et commerce international, Faculté Sciences Economiques, Université d'Abidjan, 1982), pp.53-54.

Despite the oft mentioned fears of the consequences of the widespread adoption of western consumption patterns, change towards foods of the processed and packaged variety was slow.<sup>24</sup> Ajanohoun (1982) has characterised the Ivorian consumer as being at the beginning of the transitional phase and Requier-Desjardins has argued that processed food demand in Ivory Coast was strongly linked to consumption outside the home and to the integration of products into local food preparations.<sup>25</sup> Both these trends are examined later. Whilst income and population were the main determinants of the extent of the consumption illustrated in Tables 26 and 27 and in Figure 8, demand for individual products varied sharply according to income distribution, urbanisation and a host of other exogenous factors which will now be examined more closely.

<sup>24</sup> W.Weekes-Vagliani, Actors and Institutions in the Food Chain: the Case of the Ivory Coast (OECD, Paris, 1985), pp.53-55.

<sup>25</sup> D.Requier-Desjardins, 'Industrie agro-alimentaire et modes de consommation', Economie et Humanisme, 296 (1987), p.32-33; D.Requier-Desjardins, L'alimentation en Afrique (Karthala, Paris, 1989), p.103.

## 6.2 URBANISATION, INCOME DISTRIBUTION AND DEMAND

Income per capita in Third World towns is mostly higher than in rural areas and this has generally led to a greater proportion of income being spent on processed foods. Further, there is substantial evidence to support the view that, worldwide, urban populations are more likely to consume processed foods than rural ones. The adoption of new foods such as sweet spices and hot drinks in Europe between 1680 and 1770 occurred first in towns<sup>26</sup> whilst in Rumania, French fashion and culinary influence in the late eighteenth and early nineteenth centuries was for a long time restricted to the urban upper classes.<sup>27</sup> In northern Canada, changes in local economic conditions led to the Dene Indians settling in permanent communities where they became reliant on white Canadian products.<sup>28</sup> In the Third World, Santos cited several examples of higher consumption in urban than in rural areas of, for example, milk products.<sup>29</sup> Den Hartog found that migrants in Accra used new foods whilst retaining their traditional culinary techniques.<sup>30</sup>

From the evidence cited above, urbanisation is an important indicator of growing market potential. In Ivory Coast, the rate of urbanisation was dramatic, as illustrated in Figure 9 and Table 28. The growth of Ivorian towns has resulted from foreign immigrants, internal migration of Ivorians, and natural growth. In 1975, around half the African immigrants and about 30% of Ivorians lived in cities<sup>31</sup> whilst 81.9% of non-Africans were in Abidjan.<sup>32</sup>

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<sup>26</sup> H.J.Teuteberg, 'A Preliminary Outline of Problems and Methods'. In A.Fenton and E.Kisbán (eds.), Food in Change (John Donald, Edinburgh, 1986), pp.19-20.

<sup>27</sup> O.Văduva, 'Popular Rumanian Food in the Late Eighteenth and Early Nineteenth Centuries: Traditional and Incoming Elements'. In Fenton and Kisbán (eds.), Change, pp.99-103.

<sup>28</sup> P.Fieldhouse, Food and Nutrition: Customs and Culture (Croom Helm, 1986), p.9.

<sup>29</sup> M.Santos, 'L'alimentation des populations urbaines des pays sous-développés', RTM, 8, 31 (1967), pp.605-629.

<sup>30</sup> A.P.den Hartog and W.A.van Staveren, Manual for Social Surveys on Food Habits and Consumption in Developing Countries (Pudoc, Wageningen, 1983), p.16.

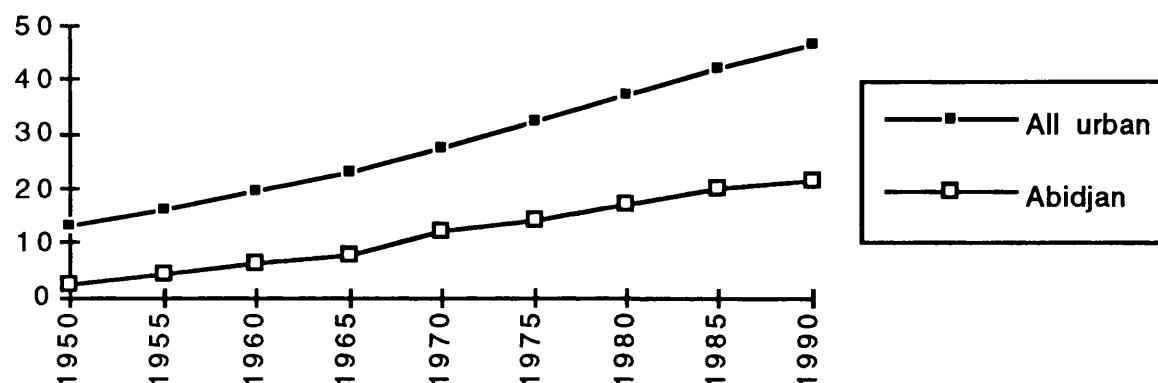
<sup>31</sup> Zachariah and Conde, Migration, p.36.

<sup>32</sup> RCI, Population de la Cote d'Ivoire (Ministère de l'Economie et des



FIGURE 9

ALL URBAN AND ABIDJAN AGGLOMERATION POPULATIONS AS A PERCENTAGE OF TOTAL POPULATION



Sources: UN, Historical Supplement; World Bank, 1988-89, pp.212-213; EIU, Report, Nr 4 (1992), p.3; AOF, Annuaire Statistique de l'AOE, 5, 1 (Paris, 1956), p.45; RCI, Population de la Cote d'Ivoire (1984); UN, Prospects for World Urbanisation 1988 (1989), p.104; D.Bollinger, Le marketing en Afrique, tome 1: la Cote d'Ivoire (CEDA, Abidjan, 1977), p.66; R.J.Mundt, Historical Dictionary of the Ivory Coast (Scarecrow Press, Metuchen, 1987), p.xix.

TABLE 28: EVOLUTION OF THE POPULATION OF THE 15 LARGEST TOWNS IN 1988

| RANK 1988 | TOWN         | REGION | 1955    | 1965    | 1975    | 1988      |
|-----------|--------------|--------|---------|---------|---------|-----------|
| 1         | Abidjan      |        | 125,000 | 330,000 | 951,216 | 1,934,342 |
| 2         | Bouake       | C      | 42,000  | 85,000  | 175,264 | 332,999   |
| 3         | Daloa        | CW     | 17,600  | 35,000  | 60,837  | 122,933   |
| 4         | Yamoussoukro | C      |         | 8,000   | 37,253  | 110,013   |
| 5         | Korhogo      | N      | 13,200  | 24,000  | 45,250  | 109,655   |
| 6         | Man          | W      | 7,400   | 30,000  | 50,288  | 88,294    |
| 7         | Gagnoa       | CW     | 15,300  | 21,000  | 42,285  | 85,094    |
| 8         | Divo         | CW     |         | 18,000  | 35,610  | 72,494    |
| 9         | San Pedro    | SW     |         |         | 31,606  | 70,601    |
| 10        | Abengourou   | E      | 3,100   | 17,000  | 30,028  | 58,974    |
| 11        | Anyama       | SE     |         | 11,200  | 26,406  | 57,065    |
| 12        | Agboville    | SE     |         | 17,500  | 26,914  | 46,359    |
| 13        | Grand Bassam | SE     |         | 16,500  | 27,273  | 41,825    |
| 14        | Dabou        | SE     |         | 11,000  | 23,134  | 39,494    |
| 15        | Dimbokro     | C      | 3,800   | 15,000  | 31,073  | 38,183    |

Sources: AOF, Annuaire statistique de l'AOE 1955; RCI, Population de la Cote d'Ivoire 1975 (1984); RCI, Recensement 1988.

In 1973, urban dwellers' income was on average an estimated

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Finances, Abidjan, 1984), p.58.

four and half times higher than that of rural dwellers.<sup>33</sup> In Table 29, the three regions with the highest average annual income per head were also the ones with the highest proportion of urban inhabitants in 1975.<sup>34</sup> However, large numbers of shanty town residents were unemployed or underemployed and had less disposable income than many rural people. Thus, whilst there was a large disparity in income between rural and urban populations, the figures conceal a probably even larger difference between rich and poor urban inhabitants.

TABLE 29: AVERAGE ANNUAL INCOME PER CAPITA BY REGION IN CFA

| REGION       | 1971 - 73<br>mean | 1975   | % increase |
|--------------|-------------------|--------|------------|
| south east   | 21,105            | 32,400 | 53.5       |
| south west   | 8,810             | 12,000 | 36.2       |
| centre       | 13,770            | 21,340 | 55.0       |
| centre west  | 19,170            | 30,500 | 59.0       |
| centre north | 4,210             | 5,000  | 18.8       |
| north        | 4,970             | 6,000  | 20.7       |

Source: Bollinger, Marketing, p.75.

Figures on income distribution are not only limited but subject to error given the informal way in which many people acquire their income. Further, comparing income distribution patterns over time poses problems as different methods of data collection and presentation have been used.<sup>35</sup> The large disparities in income distribution hinted at above are also evident in Tables 30 and 31.

TABLE 30: INCOME DISTRIBUTION PER CAPITA IN 1970 AND 1973-74

| INCOME GROUP | 1970 | 1973-74 |
|--------------|------|---------|
| lowest 40%   | 10.8 | 19.7    |
| middle 40%   | 32.1 | 28.7    |
| top 20%      | 57.1 | 51.6    |

Source: B. A. den Tuinder, Ivory Coast: the Challenge of Success (John Hopkins, New York, 1978), p.135.

<sup>33</sup> A. Dubresson, Villes et industries en Cote d'Ivoire (Karthala, Paris, 1989), p.251.

<sup>34</sup> RCI, Population.

<sup>35</sup> World Bank, World Development Report 1992, p.301.

TABLE 31: PER CAPITA EXPENDITURE, 1986

| INCOME GROUP | 1986 |
|--------------|------|
| lowest 40%   | 13.0 |
| middle 40%   | 34.4 |
| top 20%      | 52.7 |

Source: World Bank, World Development Report 1990 (OUP, 1990), pp.236-237.

There are also figures for 1978 and 1985-86 but these are expressed in terms of households and use different percentage categories making comparisons with the data virtually impossible. Further, "households with low per capita incomes frequently are large households, whose total income may be high, and conversely many households with low household incomes may be small households with high per capita incomes".<sup>36</sup> They would appear to present an even less equitable distribution of resources than Tables 30 and 31 show but also that there was little change in distribution over time.

TABLE 32: INCOME DISTRIBUTION BY HOUSEHOLD GROUP IN 1978 AND 1985-86

| HOUSEHOLD GROUP | INCOME | % SHARE 1978 | % SHARE 1985 - 86 |
|-----------------|--------|--------------|-------------------|
| top 10%         |        | 42           | 43.7              |
| middle 30%      |        | 40           | 36.8              |
| lower 60%       |        | 18           | 19.5              |

Source: A.Dubresson, Villes et industries en Cote d'Ivoire (Karthala, Paris, 1989), p.252; World Bank, World Development Report 1988 (OUP, 1988), p.272.

The figures presented in Tables 30, 31 and 32 are further distorted as at least some were based on cash incomes;<sup>37</sup> thus no account was taken of subsistence in rural areas. However, there has evidently been a substantial inequality in purchasing power since at least 1970. Dubresson has estimated that purchasing power of the average Abidjan household between 1963 and 1978 rose marginally but that per capita purchasing power declined marginally as the size of households increased over the period.

<sup>36</sup> World Bank, Report 1988, p.301.

<sup>37</sup> Dubresson, Villes, p.251.

Since 1978, this per capita decline has continued.<sup>38</sup>

Europeans were high wage earners. In the private sector senior managers in the mid 1980s were earning in excess of one million CFA per month, and often much more.<sup>39</sup> In 1978 Europeans earned an estimated 13.9% of national income, more than four times the amount of the entire rural population of the savannah region.<sup>40</sup> Whilst many Lebanese were poor on arrival and lived frugally once settled during the inter-war years<sup>41</sup> and were thus initially indisposed towards spending large sums on luxury food, this was less true of more recent times. The Lebanese were amongst the highest earners in the country, their share of income in 1978 being an estimated 10.6%.<sup>42</sup> However, this hides a great diversity in income. Bigo, presumably referring to the late 1980s, estimated that 85% of Lebanese, whilst well off compared to most Ivorians, did not have the resources to “live on the Plateau, with villa, luxury car and gaudy clothes as status symbols.”<sup>43</sup>

Evidence of links between urbanisation and income levels on the one hand and demand for processed foods on the other comes from a variety of consumer surveys. The 1956 household budget surveys for Abidjan and Bongouanou subdivision<sup>44</sup> deal with salaried workers and planters respectively. Only 0.025% of total household food and drink expenditure was on processed foods in Bongouanou subdivision and between 2% and 2.8% in Abidjan. These figures must, of course, be treated with a good deal of caution. But the general message is clear: processed foods in 1956 were all but insignificant as far as the average Ivorian consumer was concerned.

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<sup>38</sup> *Ibid.*

<sup>39</sup> Personal experience: discussions with DANAFCO accountants (1983-85).

<sup>40</sup> Dubresson, *Villes*, p.247.

<sup>41</sup> Bigo, ‘Network’, pp.511-512.

<sup>42</sup> Dubresson, *Villes*, p.247.

<sup>43</sup> Bigo, ‘Network’, p.523.

<sup>44</sup> AOF, Les budgets familiaux des salaires africains en Abidjan (aout-septembre 1956) (Service de la Statistique et de la Mécanographie, Paris, 1958), pp.102-103; AOF, Enquete nutrition-niveau de vie subdivision de Bongouanou 1955-56 (Service de la Statistique et de la Mécanographie, Paris, 1958), pp.123, 132.

Figures from four 1963 surveys indicated an increase in processed food consumption in Abidjan and much lower consumption rates in other areas of Ivory Coast. Processed foods as a percentage of the total food and drink budget (including subsistence) amounted to 3.5% in Abidjan, 1.3% in the south east region and 0.6% in both the Seguela-Odienne and Korhogo regions, all figures being approximate. Of the Abidjan data, 2.2% was in milk products.<sup>45</sup> As the Abidjan figures for 1956 were for salaried workers only and the 1963 ones for all inhabitants, the increase in consumption is likely to have been greater than the statistics indicate, the reasons for which are elaborated upon later.

The final set of figures is the most satisfactory as all the data come from the same source and distinctions are made between rural and urban areas. Table 33 shows the the value of processed foods consumed per head as a percentage of total food and drink expenditure in 1979.

TABLE 33: SHARE OF PROCESSED FOOD CONSUMPTION IN TOTAL FOOD AND DRINK EXPENDITURE, 1979

| AREA              | %    |
|-------------------|------|
| Abidjan           | 10.6 |
| other towns       | 7.6  |
| rural forest east | 3.7  |
| rural forest west | 3.2  |
| rural savannah    | 4.5  |
| all Ivory Coast   | 6.5  |

Source: RCI, Enquête budget consommation 1979 (Direction de la Statistique, Abidjan, 1984), pp.172-179.

The above data confirm not only the difference in consumption between rural and urban areas but also that increased income levels have been accompanied, in Abidjan at least, by increased consumption levels. Between 1956 and 1979, rises in urbanisation levels and in income per head correlate with increased consumption of processed foods, whether measured by total

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<sup>45</sup> Requier-Desjardins, Alimentation, p.96.

imports or by consumption per head. Additionally, the figures showing the south east to be the most wealthy region of the country are matched by this same region having the highest consumption rate for processed foods. The rest of this chapter will attempt to explain these patterns in more depth with particular attention given to urbanisation related factors and to ways in which marketeers have attempted to exploit the environment.

### 6.3 CONSUMPTION IN URBAN AND RURAL ENVIRONMENTS

The reasons for higher consumption of processed foods in urban areas were many and varied. It has already been shown that incomes were higher in urban areas, a factor related to education levels and employment status. In Ivory Coast, many school teachers were French and some textbooks were the same as those used in French schools. Perhaps more importantly, schooling meant literacy and literacy meant consumers could read labels on products.<sup>46</sup> The enrolment rate in schools in Ivory Coast rose over the years (see Table 34) but schools in rural areas were less common and parents were on average poorer so their children were more likely to be illiterate.<sup>47</sup>

TABLE 34: SCHOOL ENROLMENT, PERCENT OF CHILDREN

| YEAR    | PRIMARY | SECONDARY |
|---------|---------|-----------|
| 1965-66 | 35      | 3         |
| 1970    | 58      | 9         |
| 1975    | 62      | 13        |
| 1979    | 72      | 20        |
| 1982    | 82      | 19        |
| 1984    | 78      | 20        |

Sources: World Bank, World Tables 1987; R.Clignet and P.Foster, 'Convergence and Divergence in Educational Development in Ghana and the Ivory Coast'. In P.Foster and A.R.Zolberg (eds.), Ghana and the Ivory Coast (University of Chicago Press, Chicago, 1971), p.273.

<sup>46</sup> Ajanohoun, 'Marchandise', p.81; Fieldwork: observation (1990). All future references to Fieldwork are for all the period July to December 1990 unless otherwise stated.

<sup>47</sup> D.Bollinger, Le marketing en Afrique, tome 1: La Cote d'Ivoire (CEDA, Abidjan, 1977), pp.70-74; RCI, Population, pp.251-253.

Education levels, crucially, also determined job opportunities and therefore conditioned income. The Ivorian elite<sup>48</sup> which came to power at independence were all graduates of the *Ecole Ponty* in Dakar and/or had been educated in France. The same was also true of many party and government officials through to 1990<sup>49</sup> as well as the *cadres* employed in European companies. Thus Western influences were acquired through the labour market where they come into daily contact with Europeans, sometimes eating at their homes or at restaurants with them.<sup>50</sup> As Goody observed in Ghana, "for formal occasions . . . people will repair to restaurants . . . Formal occasions require formal food, which tends to be defined as European."<sup>51</sup> Almost all of these firms were situated in Abidjan or Bouake.<sup>52</sup> However, the statistical evidence on different levels of processed food consumption according to socio-professional categories is patchy.

This process of adopting the "norms and values of an alien culture" is referred to as 'acculturation' although eating habits may not be so readily influenced as they are a "more private affair".<sup>53</sup> Some Africans worked for companies which either imported, wholesaled or manufactured processed foods and were not only influenced themselves but also influenced their families and friends.<sup>54</sup> One study has shown that young children may be more inclined to adopt new eating habits if they see adults using them.<sup>55</sup> Consumption of the products of a company one worked for was often facilitated by price reductions for staff. Employees, both private and state, were also the most likely to be affected by

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<sup>48</sup> For a definition of 'The Ivorian elite' see T.Bakary, 'Elite Transformation and Political Succession'. In I.W.Zartman and C.Delgado (eds.), The Political Economy of Ivory Coast (Praeger, New York, 1984), pp.21-55.

<sup>49</sup> Bakary, 'Elite', pp.25-46; PDCI, PDCI-RDA annuaire 1985-1990: annuaire historico-politique (Fraternité-Hebdo, Abidjan, 1987), pp.11-180.

<sup>50</sup> Bakary, 'Elite', p.65; Ajanohoun, 'Marchandise', pp.80-84; Personal experience: observation.

<sup>51</sup> J.Goody, Cooking, Cuisine and Class (CUP, Cambridge, 1982), p.178.

<sup>52</sup> Dubresson, Villes, pp.119-122.

<sup>53</sup> Fieldhouse, Nutrition, p.8; Goody, Cooking, pp.176-177.

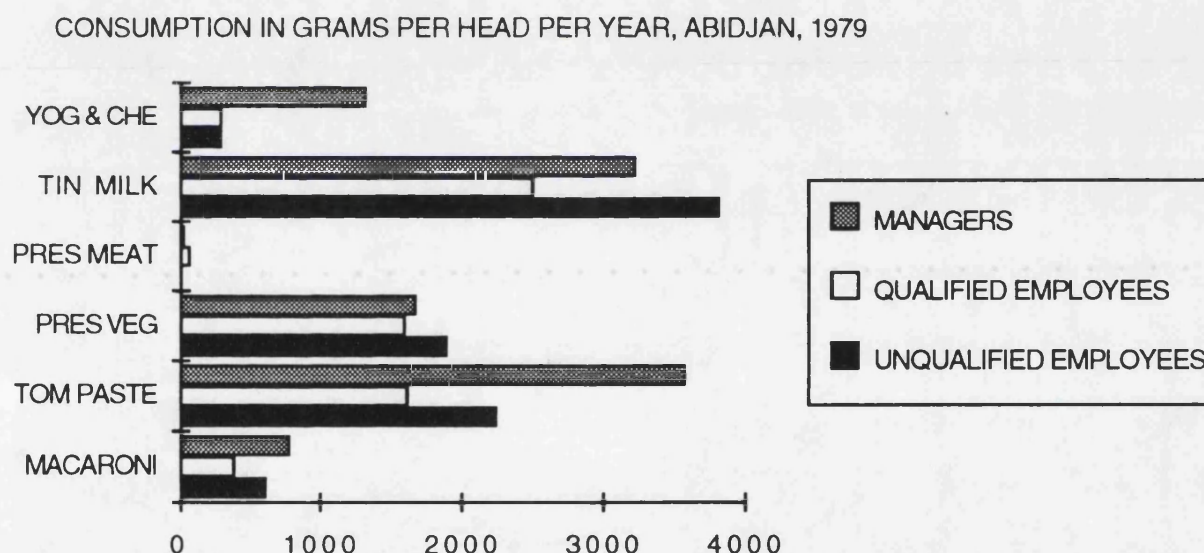
<sup>54</sup> Ajanohoun, 'Marchandise', pp.80-84; Personal experience: observation.

<sup>55</sup> Fieldhouse, Nutrition, p.6.

the 'demonstration effect', that is the desire to emulate elite consumption patterns for reasons of prestige and health.<sup>56</sup>

Figure 10 below reveals some conflicting evidence regarding consumption of processed foods by different levels of consumers. Of the six products shown, meat preserves consumption was too low to be of value whilst, of the remaining five, three showed managers to be the highest consumers. Of the other two, tinned milk was more heavily consumed by unqualified employees (which was not surprising given that it was a mass market product) whilst the pattern of consumption of preserved vegetables is rather more difficult to explain.

FIGURE 10



Key: Yog & Che = Yoghurt and Cheese, Pres = Preserved, Tom = Tomato.

Source: RCI, *Consommation*, pp.64-80.

One problem with the source is that the processed foods presented are largely big selling items which many unqualified employees could afford and which managers were likely to spend a smaller proportion of their income on. The result is that, the products taken collectively, the graph gives the impression that there was

<sup>56</sup> Ajanohoun, 'Marchandise', p.82; Bollinger, *Marketing*, p.65; M.Behar, 'European Diet Versus Traditional Foods', *Food Policy*, 1, 5 (Nov 1976), p.432; Goody, *Cooking*, p.181.



little difference between the two groups. The second problem concerns the socio-professional categories. Apart from the ones shown on the graph, the following were also given: people without an activity, proprietors and independants, *exploitants agricoles*, agricultural labourers, and traders. The problem with the agricultural labourers category is that they did not reside in cities which means that these poorly paid people are excluded from the graph whilst unqualified labourers, who are among the best paid of low level consumers, are included. This results in a consumption level for the representatives of unqualified employees being higher than the probable mean.

The problem with the other socio-professional categories is that they contain all income groups as well as comprising both rural and urban dwellers. The categories 'proprietors and independents' and 'traders' include the wealthy formal sector Ivorian proprietor as well as the small artisan often not knowing where his next meal will come from, and the same could be said for the *exploitant agricole*. Most problematic of all though are those classified as *sans activite*, the large majority of whom are presumably unemployed. However, according to the survey, their wine consumption per head (excluding the traditional palm wine) was four and half times that of the managerial category!

One likely explanation for the smaller than expected differences in processed food consumption between managers and labourers concerns the distance to work many workers had to travel. In Abidjan, most formal sector businesses were located in the districts south of the lagoon or just north of it whilst the largest non-elite residential areas were on the outskirts of the city and involved between an hour and an hour and a half of travel.<sup>57</sup> This effectively meant that many workers could not return home for lunch and, if they started early or worked late, it was likely if not necessary that they ate outside the home. Whilst many had lunch at roadside 'restaurants' serving traditional food, others breakfasted or suppered at kiosks which served western type

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<sup>57</sup> Dubresson, *Villes*, pp.424-430; Personal experience: observation: discussions with employees.

foods like coffee with (condensed) milk, sandwiches, oat porridge and tea. This not only meant they may have been substituting a meal using more traditional ingredients but also familiarised them with non-traditional products which, especially in the long run, could lead them to purchasing such products for the home.<sup>58</sup> Den hartog and van Staveren neatly summarised the urban situation when they stated:

The supply of local traditional commodities is often inadequate and there is not always sufficient time for lengthy food preparation. . . . these factors make townsfolk receptive to new foods that are quick and easy to prepare . . . and attractively packaged. Most will be preserved foods. <sup>59</sup>

Thus, as Goody observed in Ghana,<sup>60</sup> the mobility and employment of urban consumers makes convenience an important factor in determining demand. Guyer estimated that in Africa generally, ten to 25% of the urban population used "urban gardening" to supply their needs.<sup>61</sup> Further, in 1920s Dar es Salam, she stated that men "often depended on the food parcels that a wife or visiting relative brought them from farms in the home areas".<sup>62</sup> The same was also true to an extent in Abidjan in the 1980s.<sup>63</sup> Nonetheless, access to indigenous foods is easier in the interior whilst shops in the distribution network, the primary vendors of processed foods, are more numerous and larger in urban areas.<sup>64</sup> Chapter 4 showed that supermarkets and grocery stores were only found in urban areas and that they carried a far wider range of products than small stores. Further, transport of goods was much easier within and between urban areas. This suggests that demand for processed foods in urban areas is both greater and involves a wider range of products.

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<sup>58</sup> Ajanohoun, 'Marchandise', p.73; Personal experience: observation (1983-84).

<sup>59</sup> Den Hartog and van Staveren, Manual, p.15.

<sup>60</sup> Goody, Cooking, pp.176-180.

<sup>61</sup> J.Guyer, 'Introduction'. In J.Guyer (ed.), Feeding African Cities (Manchester University Press, Manchester, 1987), p.13.

<sup>62</sup> Ibid, pp.64-65.

<sup>63</sup> Personal experience: observation, discussions with salesmen and friends; Fieldworkwith: discussions with passengers on buses.

<sup>64</sup> Requier-Desjardins, 'Industrie', p.32.

Other factors which discourage consumption of processed foods in rural areas are the lack of household facilities such as cooking appliances and refrigeration.<sup>65</sup> No fridge means no frozen foods and more limited preservation periods for some other products. In 1973, just 2% of households in villages had cooling facilities compared to 37% in Abidjan and 29% in other urban areas.<sup>66</sup>

As well as restricted access to goods, rural consumers also had less access to the media. Media exposure to western cultural influences is seen by many as a major way in which habits are changed for "as communication over vast distances has become simpler, so too has the ability of one culture to influence another".<sup>67</sup> Warner Bros. Television boasted that its product "appears in 104 countries in 24 languages, from Ecuador, Iceland and Qatar to the Ivory Coast, Barbados and Thailand".<sup>68</sup> It is almost impossible to gauge empirically the importance of "long-term but constant exposure . . . to certain kinds of 'messages'"<sup>69</sup> but Powdermaker, an anthropologist, claimed that "All entertainment is education in some way, many times more effective than schools because of the appeal to the emotions rather than to the intellect."<sup>70</sup> Television, like film, can be "considered a great medium of information and persuasion, which not only selectively presented certain traits and ideals but also glamorised them".<sup>71</sup> It was long ago recognised that American films were influential on the American trade balance in goods (besides films) and the immediate post-war U.S. government regarded the media as vital to promoting the 'American way of life'.<sup>72</sup> As Jowett and Linton observe on movies, televisual and other images can become

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<sup>65</sup> Ajanohoun, 'Marchandise', pp.81-82.

<sup>66</sup> Bollinger, Marketing, p.75.

<sup>67</sup> Warner Communications, Inc. Annual Report 1982. Reprinted in T.Balio (ed.), The American Film Industry (University of Wisconsin Press, Madison, revised ed. 1985), p.595.

<sup>68</sup> Ibid, p.597.

<sup>69</sup> G.Jowett and J.M.Linton, Movies as Mass Communication (SAGE, Beverly Hills, 1980), p.106.

<sup>70</sup> H.Powdermaker, Hollywood: the Dream Factory (Little, Brown and Co, Boston, 1950), p.14.

<sup>71</sup> T.H.Guback, 'Hollywood's International Market'. In Balio, Film, p.468.

<sup>72</sup> Ibid, pp.466, 473.

a quasi-encyclopedia in which one finds the visual repository of much of our culture. This can easily be demonstrated if one closes one's eyes and tries to visualize in as much detail as possible a historical figure such as the Roman centurion. Think. Where did this image originate ? In most cases it would be either the movies or television. <sup>73</sup>

Finally, it is worth considering the statement that "*Some* people are influenced by *some* media, at *some* time" as being "a commonly held belief by social scientists".<sup>74</sup> The more vexing problem is '*how many* by *how much* and *how often*. It is likely that advertisements are important in establishing an 'image', especially visual, which can serve to draw consumers' attention on seeing the product when shopping. Evidence from Ivory Coast might be cited from the success of the Quaker campaign, the dominance of heavily advertised Nestlé products (both of which are examined later) and the case study of the cube trade presented in the following chapter. However, in each of these cases, there were other variables but many traders regarded advertising as an important pre-requisite for stocking certain products.<sup>75</sup>

Ivorian radio and television constantly emit images and sounds of the way of life in the most developed countries of the world, through either advertising or foreign programs.<sup>76</sup> Bollinger referred to the Ivorian as having "*une double appartenance socio-culturelle*", that he is part European and part traditional African.<sup>77</sup> The sources of the influences are many, and contact with all of them is more likely in urban areas than in more isolated rural dwellings. It is therefore at least conceivable that western 'media materials' have also influenced the Ivorian trade balance, and therefore consumption, through entertainment, education and advertising.

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<sup>73</sup> Jowett and Linton, Mass, p.111.

<sup>74</sup> Ibid, p.74.

<sup>75</sup> Personal experience: discussions with traders.

<sup>76</sup> Personal experience: observation; Fieldwork: observation.

<sup>77</sup> Bollinger, Marketing, p.63.

In rural areas, television sets are less common, partly due to no electricity. Introduced in mid 1963, television could be received by only a quarter of the country by the end of 1964.<sup>78</sup> In August 1966 five to six hours of programs per day could be watched by two thirds of the country<sup>79</sup> and by mid 1973 this had increased to four fifths of the country.<sup>80</sup> However, in 1973, whilst 61% of households in Abidjan and 43% in other towns had electricity, only 2% of households in villages had this facility. The distribution of radios is more even, 30% compared to 86% in Abidjan and 71% in other towns.<sup>81</sup> Thus, despite rural-urban differences, Africans have increasingly come into contact with outside influences.

TABLE 35: RADIO AND TELEVISION SETS PER THOUSAND OF POPULATION

| YEAR | TELEVISION | RADIO |
|------|------------|-------|
| 1965 | 1.4        | 14    |
| 1970 | 14.0       | N.A.  |
| 1975 | 16.0       | 44    |
| 1980 | 36.0       | 120   |
| 1985 | 49.0       | 127   |
| 1988 | 54.0       | 128   |

N.A. = Not Available.

Source: UNESCO, Statistical Yearbook.

Whilst the proportion of income spent on basic food declines as income rises, as stated in Engel's law, there is a tendency for consumers to buy more high priced foods with increased income. This implies that more expensive, or less essential, processed foods have a higher income elasticity.<sup>82</sup> There may thus be an increasing tendency towards consumption emulation with a rise in income whilst the proportion spent on convenience foods remains the same. There are many isolated examples of consumers emulating something they see. For example, in America Veronica

<sup>78</sup> ARB (Political series), 2, 1 (Jan 1965), p.234.

<sup>79</sup> Ibid, 3, 8 (Aug 1966), p.604.

<sup>80</sup> Ibid, 10, 6 (June 1973), p.2904.

<sup>81</sup> Bollinger, Marketing, p.75.

<sup>82</sup> Den Hartog and van Staveren, Manual, p.23; Jones and Merat, 'Exotic', p.52; R.Lawson, 'The Supply Response of Retail Trading Services to Urban Population Growth in Ghana'. In C.Meillassoux (ed.), The Development of Indigenous Trade and Markets in West Africa (OUP, 1971), p.379.

Lake and Carmen Miranda popularised particular hair and clothes fashions through 1940s Hollywood films.<sup>83</sup> However, these remain isolated examples. In Ivory Coast, emulation in food consumption for prestige is probably more likely to occur through personal contacts and the long-term and constant media 'messages', especially if the consumer is exposed from childhood.<sup>84</sup>

The final factor in higher urban consumption is that most Europeans, from the earliest days of colonialisation, have sought to maintain a diet similar to back home. After the final lifting of rationing in 1950, this became increasingly possible. In 1956 the Printania supermarket opened, followed by others and then Nour Al Hayat 1967 which specialised in imported goods. By 1972, these numbered some 2,200 items of preserved food alone (out of 4,000 items in all).<sup>85</sup> From these early years up to 1990, 90% of Nour Al Hayat's clients were Europeans.<sup>86</sup> Even for Europeans living in the interior (few in number and declining)<sup>87</sup> there were few restraints as most towns have had a grocery store stocking hundreds of processed foods since at least the early 1960s.<sup>88</sup>

The majority of the Lebanese population was also urban based. Lebanese food was widely available, not only in the home but also in Lebanese restaurants of which there were at least a dozen in Abidjan in the mid 1980s.<sup>89</sup> However, they were major purchasers of certain western foods, amongst which were cheese, concentrated squash, luxury biscuits and jam but appeared not to consume in any great quantity such products as concentrated milk or bouillon cubes.

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<sup>83</sup> 'Star Power'. In M.Webb (ed.), Hollywood: Legend and Reality (Little, Brown and Company, Boston, 1986), p.191.

<sup>84</sup> Jowett and Linton, Mass, p.106. Fieldhouse, Nutrition, pp.4-8.

<sup>85</sup> A.Maurel, 'Les sociétés de distribution alimentaire en Cote d'Ivoire', Africa [now Africa International], 68 (Dakar, 1974), p.43.

<sup>86</sup> Interview: Mr. P.Paoli, Manager of Champion Supermarket (Abidjan, November, 1990).

<sup>87</sup> There were 309 French citizens in 1990 in Korhogo préfecture, a fall of 40 on the previous year. Fieldwork: discussion with French Consul, Korhogo (Nov 1990).

<sup>88</sup> See, for example, SEDES, 'Région du sud-est. Etude socio-économique' (Ministère du Plan, Abidjan, 1967).

<sup>89</sup> Personal experience.

In summary, there were two forms of differences in rural-urban processed food demand, these being quantity consumed per head and types of products consumed. The main factors which influenced these consumption differences were employment status (income), work environment, education, media access, transport, product access or the distribution network and the location of most Europeans in Abidjan and Bouake.

#### 6.4 INDUCED CONSUMER DEMAND: PRODUCTS, PROMOTION AND PUBLICITY

Most marketing in Ivory Coast, as elsewhere, has sought to induce increased consumption of processed foods in two ways, by exploiting the attributes of their products and the environment in which they were marketed. For any one item, product attributes may have included price, packing, convenience, nutrition, novelty, status and taste. The tools with which these attributes could be exploited were media advertising, field promotions, sponsoring and point of sale persuasion.<sup>90</sup>

The promotion of processed foods is a fairly recent phenomena in Ivory Coast, still practiced only by a few. Point of sale was used in colonial times although whether the potential for word of mouth publicity was fully realised is debateable. In field promotion marketing, Blohorn and Nestlé led the way in the 1960s. This technique has been used nationwide for only a few products but tastings in selected locations became a common practice in the 1980s. Of the different kinds of media advertising, by far the oldest is that through newspapers and journals which can be dated back to the end of the last century.<sup>91</sup> However, even in more recent times the number of Ivorians that read a newspaper

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<sup>90</sup> Interview: Mr.Merhouet, Junior Partner of SABIMEX (Abidjan, November 13 1990); Assouan; Personal experience: observation: discussions with commercial sector employees and managers.

<sup>91</sup> A.Assande, 'Le marketing en Cote d'Ivoire: mythes ou réalités', Revue Ivoirienne de Marketing, 1 (1987), pp.31-39, 43-45, 48; O.S.Savane, De la publicité en Cote d'Ivoire (CEDA, Abidjan, 1986), pp.34-42.

was limited (44% of the population in 1976 read the then sole daily paper Fraternité Matin at least several times a month)<sup>92</sup> and before the 1960s it was unlikely to have been more than the few who made up the elite. Radio and television advertising were products of the early and late 1970s respectively<sup>93</sup> and it was also during this decade that advertising agencies first opened for business.<sup>94</sup> Sponsoring activities, be they of sporting events or television programs, appeared to mushroom during the 1980s. The costs of media advertising in particular meant that the overwhelming majority of television commercials were for the multinationals Nestlé and Blohorn. Due to the comparative lack of marketing activities prior to the late 1970s, the bulk of this section draws upon activities in the 1980s.

The exploitation of patterns of demand for processed foods in Ivory Coast has usually depended on the actual or perceived attributes of the product being marketed. Product attributes might change in importance over time. With the decline in incomes during the 1980s, price became increasingly significant. The novelty attribute of the Jumbo stock cube declined in importance over time, as would be expected by the very definition of 'novelty'.

One of the most easily identifiable attributes exploited by marketing is convenience, one strongly related to urbanisation and work. The necessity for many urban workers to eat outside the home<sup>95</sup> manifested itself most visibly through the growth in road-side restaurants, coffee tables and kiosks. Between 1984 and 1987 DANAFCO decided to target kiosks, where many Ivorians stopped for breakfast on their way to work, by doing Quaker oat porridge tastings and encouraging kiosk owners to add the product to their menu at a retail price of CFA 125 per portion. Instruction leaflets were also handed out. Porridge afforded a generous margin and, as an added inducement, Kiosks were

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<sup>92</sup> Bollinger, Marketing, p.172.

<sup>93</sup> Ibid, p.181; Savane, Publicité, p.91.

<sup>94</sup> Bollinger, Marketing, pp.166-169; Savane, Publicité, pp.95-111.

<sup>95</sup> See also Goody, Cooking, pp.179-180.



offered free Quaker T-shirts and plastic bags for every carton of empty cans accumulated. By the time the promotion period ended, around 50 kiosks in Abidjan and a further 20 in the interior were buying the oats from the nearest wholesaler and serving it as porridge.<sup>96</sup> These field promotions were periodically backed up by television advertising to further encourage Ivorians to consume the product at home as well and, whilst sales of most processed foods declined in the 1980s because of the economic climate, Quaker oats turnover increased during the promotion period.

TABLE 36: SALES OF QUAKER OATS IN CARTONS AND MILLIONS OF CFA

| YEAR | SALES IN<br>CARTONS | AVERAGE MONTHLY<br>SALES CFA mil |
|------|---------------------|----------------------------------|
| 1981 |                     | 5.5                              |
| 1982 |                     | 10.3                             |
| 1983 |                     | 8.9                              |
| 1984 | 10,933              | 13.8                             |
| 1985 | 13,897              | 17.8                             |
| 1986 | 14,557              |                                  |
| 1987 | 17,143              |                                  |
| 1988 | 16,904              |                                  |
| 1989 | 16,788              |                                  |
| 1990 | *14,640             |                                  |

\* Estimate.

Source: DSA: stock ledger: Quaker Special Markets Division, untitled (May 1985).

The decline in sales after the period of heavy promotion is telling and reinforces a point that will be argued in the following chapter: that, in times of economic hardship, Ivorians return to using more traditional foods. In fact, by 1990, some kiosks which previously sold oat porridge were using a kind of maize flour for the porridge, a product which is both cheaper and local.<sup>97</sup> Thus, in this instance at least, during times of economic hardship, the promotion effect was short term.

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<sup>96</sup> Interview: Mr. Bernadin Doh Gilles, Salesman at Blohorn and DANAFCO (Abidjan, 1st. interview, September 20 1990); Personal experience: I was involved in the promotion(1984-86); DSA: memo, I.Trier (Quaker Special Markets Division, hereafter QSMD), 'Meeting with Peter Toxvaerd - DANAFCO - Eton 31 August 1984': letter, P.Toxvaerd (DANAFCO) to I.Trier (QSMD) (November 25 1986).

<sup>97</sup> Fieldwork: observation: discussion with Doh Gilles, Salesman at Blohorn and DANAFCO.

The Quaker promotion, although initiated by the agent and based on a similar effort by Nescafé,<sup>98</sup> fell very much within the general Quaker marketing philosophy which had relied upon demonstrations on preparation and samplings throughout the world.<sup>99</sup> Quaker also proved adaptable in promoting the product according to local customs. In France for example, as to an extent in Ivory Coast, oats were advertised for general cooking purposes. The product was also advertised with the label (the Quaker man) always prominent,<sup>100</sup> again following tradition as "the label was an important line of communication in foreign markets".<sup>101</sup>

There were many products which exploited convenience or ease of use. Advertisement messages in Ivory Coast were for the most part simple and designed to inform, a reflection of the the high illiteracy rate and low education level. Television and radio advertisements were usually broadcast in French but sometimes in Dioula, Baoule and Bete, the most widely spoken indigenous languages.<sup>102</sup> The simplicity of the message is well illustrated by the four sketches overleaf which outline a 1988 Quaker oats advertisement 'storyline': the method of preparation and the necessary ingredients and utensils are all that were shown (see Figure 11a-d)<sup>103</sup> and other products tended to follow similar principles. From 1983 to 1986 (and after), amongst the most frequently advertised processed foods were Maggi cubes, Jumbo cubes, Tanti cubes, Cerelac, Arome Maggi, Nescao, Quaker oats, Lipton teabags, Chocodi and Nescafé.<sup>104</sup> All of these items were easy to use widely distributed products.

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<sup>98</sup> Personal experience: discussion with Doh Gilles (1984).

<sup>99</sup> A.F.Marquette, Brands, Trademarks and Good Will: The Story of the Quaker Oats Company (McGraw-Hill, New York, 1967), pp.220-221.

<sup>100</sup> Personal experience: observation.

<sup>101</sup> Marquette, Quaker, p.222.

<sup>102</sup> Ibid. Personal experience: observation; Fieldwork: observation.

<sup>103</sup> DSA: telefax, DANAFCO to I.Trier (QSMD) ( March 24 1988).

<sup>104</sup> Savane, Publicité, pp.95-111; Personal experience: observation; Fieldwork: discussion with Ivoire Media official (Sept 1990); DSA: telex, I.Trier (QSMD) to E.Bosteen (DANAFCO) (25 Febuary 1988).

FIGURES 11A-D: OUTLINE OF QUAKER TELEVISION ADVERTISEMENT.

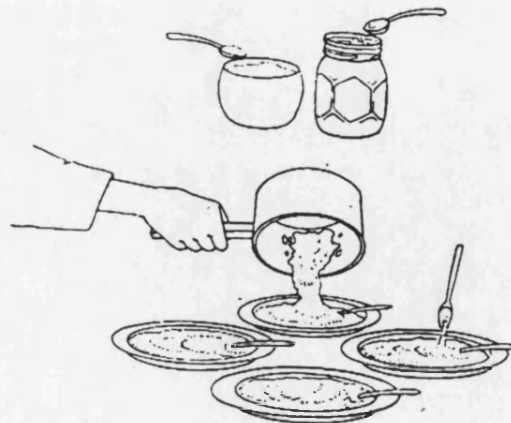
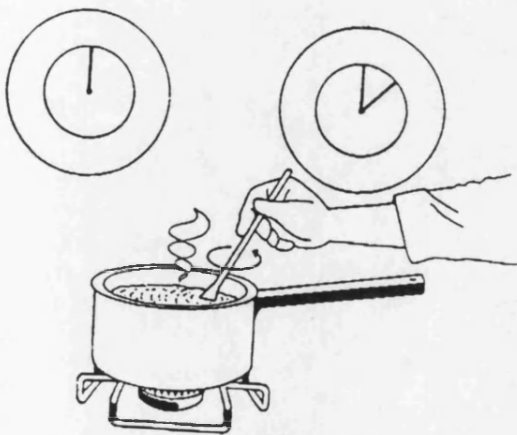
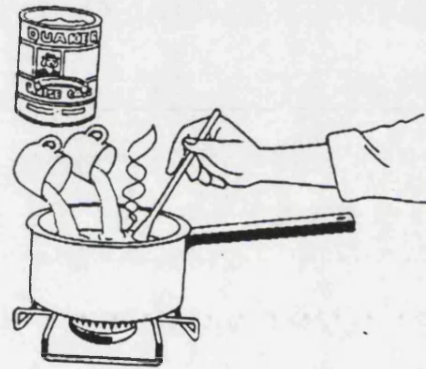
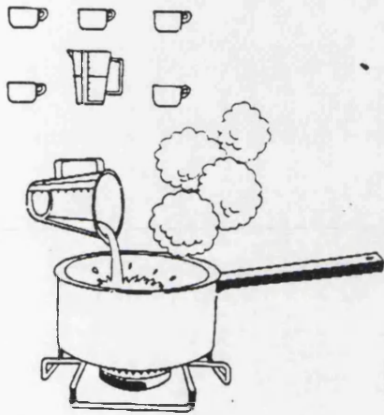
No. 31 10 4264673 24.03.88 14:10 F.01

2403

2403 (lefare  
Ian Trier

590

lefare  
Ian Trier



Source: DSA: telefax, DANAFCO to I.Trier (QSMO) (March 24 1988).

Media advertisers also attempted to attract consumers through messages relating to health and nutritional value (Quaker, Nescao, Chocodi), newness (Chocodi, stock cubes), cost and value for money (Quaker), hygiene (Chocodi), pack size (Jumbo, Nescafé), status (Liptons, Nescafé), taste (Nescafé) and as a refreshing antidote to heat and exhaustion (Liptons).<sup>105</sup>

Sponsoring sporting events was an effective way of implying that a product had nutritional value, combated exhaustion or provided energy. Quaker oats was one of the sponsoring products for the Abidjan half-marathon in 1989. For one million CFA, Quaker oats appeared on all official signs and Quaker representatives were present on the organising committee and at the prize giving ceremony. During the race, promoters gave samples to passers by and served portions to the general public from a kiosk designed like a giant Quaker oats can. Further, the event was covered extensively on television.<sup>106</sup> Other sporting sponsorships have involved Ovaltine,<sup>107</sup> Lipton tea and Yoplait yoghurt and others keen to promote the health aspects of their products.<sup>108</sup>

Sponsoring television programs, allowing marketers to target particular consumers, such as housewives, or consumers in general was also popular in the 1980s.<sup>109</sup> It was a market which Nestlé appeared to have cornered in 1990 as far as processed foods were concerned.<sup>110</sup> To sponsor a television program, a company contributed towards its production costs and in return was either allowed to broadcast a message at both the beginning and the end of the programme (eg Lipton tea and the

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<sup>105</sup> Personal experience: observation; Fieldwork: observation. See also adverts placed in local magazines and newspapers, for example: RIM, 1 (avril 1987), between pages 8-9, p.28; Eraternité Matin, (10 October 1990), p.7; Fieldhouse, Nutrition, p.13.

<sup>106</sup> Interview: Mr. Frederick Attoh, DANAFCO General Manager (Abidjan, September 1990); DSA: letter, Fédération Ivoirienne d'Athlétisme (FIA) to DANAFCO (29 August 1989); telex, DANAFCO to Quaker (27 October 1988).

<sup>107</sup> Eraternité Matin (fev 1988).

<sup>108</sup> Personal experience: observation; Fieldwork: observation.

<sup>109</sup> A.Kassi, 'Le sponsoring: un outil de développement', RIM, 4 (1990), p.31. Personal experience: observation; Fieldwork: observation.

<sup>110</sup> Fieldwork: observation.

Sunday evening movie in 1990) or else the product or its name was evident throughout the programme (eg Maggi cubes and a cookery programme in 1986).<sup>111</sup>

Particular consumer groups such as the young, rural inhabitants or early morning shoppers could also be targeted through animations using films and product messages interspersed with music from megaphones and loud speakers. This tactic was possibly inspired by the example of the music company which sold recordings in villages through public demonstrations.<sup>112</sup> The method was first used in Ivory Coast by Blohorn for the promotion of Belivoir soap in 1966.<sup>113</sup> A van travelled around the country with a film projector, speakers and two animators who showed publicity spots followed by a film (western, Kung Fu or such like).<sup>114</sup> Since then megaphones became part of the standard equipment of the salesvan, broadcasting specific messages playing music very loudly, drawing attention to a lorry which was usually decorated with product messages and designs.<sup>115</sup>

Field promotions also allowed targeting. Tastings allowed the exploitation of a product's taste attribute and familiarised consumers with a novelty product, hopefully prompting word of mouth recommendations in the process. Tastings were an essential part of the field promotions for the Maggi cube from 1965<sup>116</sup> (detailed in Chapter 7). Limited distribution processed food tastings were almost always in supermarkets and grocery stores and thus targeted Europeans and other high income consumers. Tastings were often accompanied by special brand displays, intercom announcements, price reductions, free gifts on purchase, leaflet distribution and/or prize draws.<sup>117</sup> Such promotions were

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<sup>111</sup> Ibid; Personal experience: observation.

<sup>112</sup> Warner, Annual, p.602.

<sup>113</sup> Bollinger, Marketing, p.190-191.

<sup>114</sup> Ibid; Interview: Doh Gilles (1st.).

<sup>115</sup> Personal experience: observation; Fieldwork: observation.

<sup>116</sup> J.Masini, M.Ikonocoff, C.Jedlicki and M.Lanzarotti, Multinationals and Development in Black Africa: a Case Study in the Ivory Coast (Saxon House, Farnborough, 1979), p.133; Interview: Doh Gilles (1st.).

<sup>117</sup> Fieldwork: discussion with Mme R.Theze, Chargés des Supermarchés at DANAFCO, previously at Abinader (Dec 1990): observation; Interview: Paoli:

used since at least the early 1970s in the Nour Al Hayat supermarket and became a regular feature of all supermarkets.<sup>118</sup> Products promoted by these methods included Yoplait yoghurt, Ducros spices, Quaker cereals, Ovaltine, Nescao, Nescafé, Planters' snacks and Kelloggs cereals.<sup>119</sup>

There were generally fewer in-store promotions during the rainy season when many Europeans were on holiday. Some products were promoted to coincide with certain events. Ovaltine had pencils, pencilsharpeners, rulers and rubbers attached to tins every year in September when the children returned to school whilst processed foods like Planters' snacks were often promoted around Christmas time.<sup>120</sup> Sometimes groups of products like all cheeses or a selection of products from a particular country were promoted.<sup>121</sup>

Whilst tasting may have been the most effective means of getting consumers to try a product, they were expensive to operate over a long period of time. Consequently, few companies did this on a large scale, preferring instead to use publicity material such as stickers, plastic bowls, T-shirts, caps, key rings etc. For the average African, publicity materials (and other forms of promotional activity) were virtually non-existent in the 1950s and the early 1960s.<sup>122</sup> By the early 1970s this had changed though and shops had their doors and walls covered with stickers and posters for many products, exploiting any one or more of half a dozen product attributes.<sup>123</sup> Stickers tended to find their way

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Mr. M. Anthony, Director of the Score group (Abidjan, November 1990); Personal experience: observation; E. Aka and G. Amangoua, 'Recontre avec . . . Sultan Ali Esmail, Directeur Général du Supermarché Nour Al Hayat', RIM, 1 (1987), p.17; DSA: memo, R. Theze (DANAFCO), 'Resumé du meeting avec Mr David Trewin [QSMD] le 30 mars 1984 à Abidjan concernant les supermarchés': memo, '31 August 1984'.

<sup>118</sup> Maurel, 'Alimentaire', p.43; Aka and Amangoua, 'Esmail', p.17. Fieldwork: discussion with Theze.

<sup>119</sup> Personal experience: observation; Fieldwork: discussion with Theze. See also the advertisement in RIM, 1 (1987), p.14.

<sup>120</sup> Personal experience: observation; Fieldwork: observation.

<sup>121</sup> Ibid; Aka and Amangoua, 'Esmail', p.17.

<sup>122</sup> Interview: Mr. Seydou Drabo, Storekeeper and Nightwatchman at DANAFCO (Abidjan, July 24 1990).

<sup>123</sup> Interview: Mr. Bernadin Doh Gilles, Salesman at Blohorn and DANAFCO

onto most forms of transport as well as lamp posts, gates, traffic lights, market stalls, restaurant tables and kiosk stools but many were poorly made and either faded or un-glued in the hot sun. T-shirts and caps were popular gifts with traders as were plastic bags which were often sold on the market and used until they fell apart.<sup>124</sup>

Many of the above items thus had hidden benefits, in a sense giving the consumer or trader more for the same price. This was often also be true of packing. Products sold in tins or other re-usable packing saved consumers money as they did not have to buy storage containers. Thus the Jumbo cube was deliberately marketed in hard cardboard drums which traders and market women re-used for other produce. Similarly, Nescao tins, Sunquick squash bottles and mayonnaise jars were all re-used for storage or as drinking mugs.<sup>125</sup> With low incomes more obviously in mind, price reductions were also used but were expensive and often jeopardised market stability. The aims of price cutting varied from encouraging trader loyalty to inducing cash strapped consumers to try a new product. A fuller discussions of these objectives appears in Chapter 7. Price reductions were also used by retailers to gain extra customers. For example, the Nour Al Hayat supermarket cut prices on Yoplait yoghurt, Nesquik chocolate drink, tinned tomatoes and Lu biscuits amongst other items in October 1990.<sup>126</sup>

Finally, the influence of the salesman should not be ignored. Direct selling was an important source of word of mouth communication. When traders needed convincing that they should purchase a product, the salesman usually pointed out the advantages of the product and generally provided information about it. At the same time, customers were likely to pause and listen to him as were

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(Abidjan, 2nd. interview, October 2 1990); RCI, Le Programme d'Action Commerciale (Ministère de l'Economie et des Finances, n.d. circa 1971), from a photograph.

<sup>124</sup> Personal experience: observation; Fieldwork: observation.

<sup>125</sup> Ibid.

<sup>126</sup> Fieldwork: PROSUMA publicity leaflet (October 1990).

other passers by.<sup>127</sup> The mere presence of the salesman and his van was in itself a form of promotion and some companies realised this long ago, as is illustrated by the practice of the company Afrilait who used to drive their (decorated) lorries around the streets of Abidjan on Saturdays in the 1960s,<sup>128</sup> using them as a kind of mobile billboard. In a country like Ivory Coast where media access was limited for many, exploiting word of mouth was a vital part of marketing.

## 6.5 CONCLUSION

Within the elements of population and income, the level of demand for basic foods was a function largely of urbanisation. Urban residents often required convenience products and were more exposed to supplier advertising. Luxury items were mostly consumed by Europeans, some Lebanese and high ranking private and public sector Ivorians. Mostly Abidjan based, media images and other western cultural influences as well as convenience and advertising served to stimulate demand amongst these top income earners.

Faced by a market with restricted media access and generally low incomes, marketers up to the late 1970s relied heavily on field promotions to stimulate demand for existing products or introduce new ones. With the increase in urbanisation, the exploitation of convenience, out of the home consumption became increasingly common for cheaper products. Media advertising also played an increasingly important part in stimulating demand by exploiting, through simple messages, convenience, nutritious value, economy and taste. Meanwhile, luxury product marketing mostly involved targeting consumers in the shops they frequented most, supermarkets and grocery stores.

The demand for processed foods in Ivory Coast 1956-90 was influenced by many factors, over most of which suppliers and

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<sup>127</sup> Ibid; Personal experience: observation.

<sup>128</sup> Interview: Drabo.



distributors had no control. From 1956 to the late 1970s, rapid population growth and rising national income led to large increases in imports. During the 1980s, population growth continued but incomes stagnated and then declined, slowing or reversing the growth in the market for most processed foods. However, wide disparities in income meant that consumption of many items was restricted to a few wealthy, mostly urban, residents even during periods of rapid economic growth. Whilst condensed milk, cubes, tomato puree and a small number of other products were widely consumed, inadequate distribution and cheaper, more familiar local produce in rural areas imposed limits upon the demand even for these basic items.

CHAPTER 7  
CONCENTRATED MILK AND STOCK CUBES: TWO CASE  
STUDIES OF COMPETITION AND DEPENDENCE

Whilst concentrated milk and stock cubes are both mass market products consumed by all but a small minority of Ivorians, their respective beginnings, sales evolution and marketing history are quite different. Imports by weight of concentrated milk outstripped those of cubes by almost ten to one in the mid 1980s whilst sales by value were approximately three times as high.<sup>1</sup> Concentrated milk is the older product but it was cubes that were first manufactured locally and for most of the 1980s it was cubes that had the higher marketing profile. The chapter will show: first, how competition in the two markets has differed, second, the consequences of local manufacturing and, third, the effects these have had on consumers, dependence on foreign inputs and the relationships between traders and suppliers. Different historical backgrounds and competitive and evolutionary patterns mean that the milk and cubes case studies, whilst complementary, cover a wide range of issues. Consequently, the sections are organised slightly differently.

Despite the recent intense activity in yoghurt promotions, it is concentrated milk which provides the bulk of the turnover in dairy products. In sharp contrast to the cube trade, the marketing of concentrated milk has been fairly low key. The concentrated milk section starts by examining the pre 1956 years and then moves onto the period 1956 to 1988 when imports reigned supreme and two brands dominated the market. The final section examines the effects of local manufacturing and import restrictions.

The stock cube is the only processed food product in Ivory Coast which has achieved mass distribution, by which it is meant that the product is found widely on market tables alongside the most basic consumer products. A detailed study of the product throws

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<sup>1</sup> RCI, Statistiques Douaniers; DSA: sales ledger (1984-85): report by the advertising agency Agence Aujourd'hui, 'Jumbo: relevé des achats' (1985).

light on many other areas of the processed food trade as well as clearly displaying the fingerprints of Ivorian economic policy towards foreign interests. The heavy countrywide promotion of cubes and their marketing up-country from the mid 1970s was the immediate forerunner to the sudden expansion in marketing activity which, until then, had only been developing slowly since Nestlé began marketing coffee in the early 1960s.<sup>2</sup> The section on the cube trade starts with a look at the uses and background of cubes before assessing how Nestlé created a mass market for the product. The third section examines the switch from a monopoly to an oligopoly market with the introduction of the Jumbo cube and the fourth Nestlé's response to that competition. Lastly, the reasons for the re-assertion of Nestlé's primacy and the failings of the competition are assessed.

## 7.1 CONCENTRATED MILK

### 7.1.1 Definition, Composition and Early Developments in the Market

The history of imported dairy products in Ivory Coast goes back to around the turn of the century. Concentrated milk appeared in Ivory Coast less than 50 years after its introduction in the United States in 1856. Developed in response to the distancing of market areas from production locations, condensed milk had water removed to lessen transport costs. It kept longer than fresh milk and included a sweetener. Evaporated milk, developed slightly later, came unsweetened and often with vitamin enrichment.<sup>3</sup>

At least two brands of concentrated milk, Nestlé and Ours, were available in Ivory Coast by 1914<sup>4</sup> but imports declined on the outbreak of war as manufacturing resources were diverted

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<sup>2</sup> Interview: Mr. Bernadin Doh Gilles, Salesman at Blohorn and DANAFCO (Abidjan, 1st. interview, September 20 1990).

<sup>3</sup> L.A.Maynard, 'The Development of Dairy Products'. In I.Galdston (ed.), Human Nutrition Historic and Scientific, (International Universities Press, New York, 1960), pp.200-201.

<sup>4</sup> ANCI, carton 1Q11 / file V-33-33: letter, Affaires Economiques to Inspection des Douanes (January 27 1914).

elsewhere and sea transport became scarce.<sup>5</sup> Between the wars concentrated milk seems to have been fairly widely available in the territory<sup>6</sup> and it was during the 1930s that the dominant brand of unsweetened milk, Bonnet Rouge, first appeared.<sup>7</sup> The outbreak of the Second World War led to a dramatic fall in imports in general (to one eighth of the pre-war level in 1940) and the imposition of strict rationing upon the blockading of Vichy territories in Francophone West Africa.<sup>8</sup>

Rationing continued under the Free French regime and after the war with milk generally reserved for pregnant women and infants: all forms of milk, concentrated or powdered, could be bought by most Europeans only upon presentation of a doctor's certificate<sup>9</sup> and do not appear to have been available to African children at all. Elite Africans were affected more than anyone else and students even went on strike when French style meals were stopped.<sup>10</sup> However, the Légion des Combattants were allowed processed foods which included tins of Rolust and Envol brands of sardines, Mont Blanc sweetened concentrated milk, and powdered milk.<sup>11</sup> That concentrated milk was more strictly rationed than most items seems apparent from complaints by local officials in 1946 and 1947 over limited supplies.<sup>12</sup> The import figures in Table 37 appear to confirm that milk in particular was in short supply. Note that concentrated milk was easily the largest item prior to the war, a position not regained until 1950.

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<sup>5</sup> ANCI, IQQ8/V-11-275: letter, AOF to Chambre de Commerce (July 31 1915).

<sup>6</sup> See, for example, ANCI, 5294/111-28-25: court notes, divorce case Aka vs. Agba, Abidjan (November 3 1928); ANCI, 1457/X-54-14: Fiches de Renseignements (1936).

<sup>7</sup> Interview (telephone): Mr. Kloostra, Export Manager for Africa at C.C.Friesland Froco (Rotterdam, May 3 1993).

<sup>8</sup> P.Manning, Francophone Sub-Saharan Africa 1880-1985 (CUP, Cambridge, 1988), p.116; A.G.Hopkins, An Economic History of West Africa (Longman, 1973), pp.184-185.

<sup>9</sup> ANCI, 5634/XV-6-45/46: circular, Affaires Economiques, 'Arrêté réglementant la consommation du lait' (February 27 1948).

<sup>10</sup> A.R.Zolberg, One Party Government in the Ivory Coast, (Princeton University Press, Princeton, new ed., 1969), p.61.

<sup>11</sup> ANCI, 5874/XV11-15-15: contents list from a parcel to La Légion de la Cote d'Ivoire (n.d., circa 1942): invoice, Ets. Charles Perinaud to Légion des Combattants (October 31 1942).

<sup>12</sup> ANCI, 5634/XV-6-45/46: letter, Gouverneur Général de AOF to Gouverneur de la Cote d'Ivoire (February 12 1947).

TABLE 37: IMPORTS OF SELECTED PROCESSED FOODS, TONNES

|      | CONCENTRATED<br>MILK | PRESERVED<br>VEGETABLES | PRESERVED<br>MEAT |
|------|----------------------|-------------------------|-------------------|
| 1938 | 274                  | 94                      | 65                |
| 1939 | 304                  | 142                     | 99                |
| 1946 | 7                    | 51                      | 25                |
| 1947 | 90                   | 401                     | 111               |
| 1948 | 326                  | 146                     | 75                |
| 1949 | 256                  | 277                     | 133               |
| 1950 | 685                  | 284                     | 297               |
| 1951 | 885                  | 407                     | 311               |
| 1952 | 1047                 | 551                     | 293               |

N.B. Figures for 1940 to 1945 are not available. All figures include Upper Volta which accounted for about 10% of the total.

Sources: ANCI, carton 5634 file XV-6-45/46: circular, Bureau de Statistique (April 22 1948); AOF, Commerce Extérieur de la Côte d'Ivoire et de la Haute Volta de 1931 à 1954 (Service de la Statistique et de la Mécanographie, Dakar, 1955), pp.63, 65, 67.

It is possible that only milk from France was affected by this extension, leaving Holland and Denmark as the principal suppliers. Milk rationing was finally abandoned in April 1950, six months after similar restrictions on other products.<sup>13</sup> By this time prices had risen steeply compared to their pre-war level, from CFA 5.50 in 1938 to CFA 24 in March 1948 for a 410g tin.<sup>14</sup> Price rises, although controlled, were caused by shortages and inflation in France's devastated economy and it is likely that black market activities resulted in many consumers paying substantially more than the officially sanctioned rate.<sup>15</sup>

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<sup>13</sup> V.Thompson and R.Adloff, French West Africa (Allen and Unwin, 1958), pp.436-437; ANCI, 5634/XV-6-45/46: letter, L'Administrateur des Colonies to Le Gouverneur de la Côte d'Ivoire (April 4 1950).

<sup>14</sup> ANCI, 5634/XV-6-45/46: circular, Bureau de Statistique (April 22 1948).

<sup>15</sup> Manning, Francophone, p.116; P.Anyang'Nyong'o, 'The Development of Agrarian Capitalist Classes in the Ivory Coast, 1945-1975'. In P.Lubeck (ed.), The African Bourgeoisie (Lynne Rienner, Boulder, 1987), p.188.

### 7.1.2 Developments in the Market, 1956-1988

The period 1956-88 saw huge increases in imports of concentrated milk but few changes in either methods of importing or principal countries of origin, except for the emergence of West Germany and Czechoslovakia, largely at the expense of France whose concentrated milk prices have traditionally been higher<sup>16</sup> (see Tables 38 and 39 below). Nearly half of the importers in 1950 were still involved in the 1980s. These characteristics of continuity and growth are also largely true of the sardine and tinned tomato trades, as are the surprising rarity of promotional activities. Explanations for these similarities are not self-evident but are undoubtedly linked to the strictly controlled price margins for these products.<sup>17</sup> In fact, none of the products subject to margins substantially below the standard 50% in 1988<sup>18</sup> (that is, the public retail price may not be more than 50% higher than the landed cost) were promoted other than through the media.

TABLE 38: ORIGIN OF IMPORTS OF SWEETENED CONCENTRATED MILK, PERCENTAGES

| YEAR | FRANCE | HOLLAND | CZECH'VAKIA | OTHERS | TOTAL IN TONNES |
|------|--------|---------|-------------|--------|-----------------|
| 1961 | 71.1   | 28.6    |             | 0.3    | 2187            |
| 1972 | 83.2   | 14.7    |             | 2.1    | 4822            |
| 1982 | 43.0   | 34.2    | 20.1        | 2.7    | 18790           |

NB: 1961 is used because figures were not available for 1962. Figures for other ten year gaps (eg 1965, 75, 85) were also incomplete.

Source: RCI, Statistiques Douaniers.

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<sup>16</sup> ANF-SOM, FIDES serie 2, carton 179: 'Comparison entre les prix FOB Francais et étrangers d'articles de consommation courante Outre-Mer' (Bureau d'Approvisionnement, octobre 1957); CFCE, 'Le marché des produits laitiers en Cote d'Ivoire', (Direction des Produits Agro-Alimentaires, Paris, 1981), p.39.

<sup>17</sup> Price controls limiting the margin between landed cost and the public retail price are imposed on products which the state regards as basic necessities for Ivoirians.

<sup>18</sup> RCI, 'Arrêté No. 001 du 15 janvier 1988' (Ministre du Commerce, Abidjan).

TABLE 39: ORIGIN OF IMPORTS OF UNSWEETENED CONCENTRATED MILK, PERCENTAGES

| YEAR | FRANCE | HOLLAND | W.GERMANY | OTHERS | TOTAL IN TONNES |
|------|--------|---------|-----------|--------|-----------------|
| 1961 | 44.4   | 51.3    |           | 4.3    | 3429            |
| 1972 | 18.0   | 73.7    | 3.7       | 4.6    | 9786            |
| 1982 | 6.2    | 52.8    | 40.1      | 0.9    | 18737           |

NB: 1961 is used because figures were not available for 1962. Figures for other ten year gaps (eg 1965, 75, 85) were also incomplete.

Source: RCI, Statistique Douaniers.

The rise in food imports generally has been dramatic and is amply illustrated in Table 40 below for concentrated milk and butter. Local fresh milk production amounted to just four million litres in 1970 and was estimated at nine to ten million litres in 1980 compared to an estimated demand of 190 million litres.<sup>19</sup> Imports of concentrated milk increased five fold between 1960 and 1970, more than doubled between 1970 and 1980 but increased only marginally until 1985 before another large rise in tonnage in 1986. This pattern is fairly consistent with the economic fortunes of the country. Between 1958 and 1974 unsweetened milk was the more popular but since then there has been little difference between the two. This would indicate a shift in use, perhaps with consumption by infants of unsweetened milk becoming proportionately less important.

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<sup>19</sup> CFCE, 'Marché'.

TABLE 40: IMPORTS OF CONCENTRATED MILK, TONNES

| DATE | SWEETENED | UNSWEETENED | TOTAL MILK<br>CONCENTRATE |
|------|-----------|-------------|---------------------------|
| 1956 |           | 1047        |                           |
| 1957 |           | 1429        |                           |
| 1958 | 1093      | 1386        | 2479                      |
| 1959 |           |             |                           |
| 1960 |           |             | 3050                      |
| 1961 | 2186      | 3429        | 5615                      |
| 1962 | 1860      | 2200        | 4060                      |
| 1963 |           |             |                           |
| 1964 | 2461      | 3549        | 6010                      |
| 1965 | 2976      | 4136        | 7112                      |
| 1966 | 3347      | 4716        | 8063                      |
| 1967 | 3633      | 5494        | 9127                      |
| 1968 | 4179      | 6240        | 10419                     |
| 1969 | 4865      | 7072        | 11937                     |
| 1970 | 6337      | 9225        | 15562                     |
| 1971 |           |             | 15676                     |
| 1972 | 4822      | 9787        | 14608                     |
| 1973 |           |             | 19469                     |
| 1974 | 6916      | 13148       | 20085                     |
| 1975 | 7759      | 6283        | 14042                     |
| 1976 |           |             | 24760                     |
| 1977 |           |             |                           |
| 1978 | 18971     | 14199       | 33284                     |
| 1979 |           |             |                           |
| 1980 | 19691     | 17609       | 37572                     |
| 1981 | 22837     | 23775       | 46612                     |
| 1982 | 18788     | 18737       | 37706                     |
| 1983 | 21475     | 17826       | 39301                     |
| 1984 | 21722     | 17649       | 36332                     |
| 1985 | 22941     | 21191       | 44132                     |
| 1986 | 24304     | 22054       | 46358                     |
| 1987 | 22717     | 23256       | 45973                     |
| 1988 | 21265     | 22354       | 43619                     |

Sources: RCI, Statistiques Douaniers; AOF, Bulletin Mensuel de Statistique d'Outre-Mer; FAO, Trade Yearbook; UN, Yearbook of International Trade Statistics; UN, Commodity Trade Statistics, series D.

Whilst much of the imported milk powder was used in the production of other foods, especially in yoghurts, most concentrated milk either passed through the usual channels of distribution to the consumer or to kiosks, described by Akindes as "*les principaux vecteurs extra-domestiques de consommation des produits de l'industrie agro-alimentaire comme le pain, le lait, le beurre, le café et le sucre*". The most popular dish served was *café complet* which consisted of coffee, chocolate, concentrated milk, bread and butter. Other products used were spaghetti, peas,



sardines, imported spices,<sup>20</sup> Quaker oats and tea bags.<sup>21</sup> Table 41 shows the composition of foods served by kiosks in 1979.

TABLE 41: COMPOSITION OF FOODS SERVED BY KIOSKS, 1979

| ITEM                   | %  |
|------------------------|----|
| bread                  | 47 |
| concentrated milk      | 26 |
| sugar                  | 12 |
| coffee                 | 8  |
| butter and margarine   | 4  |
| fresh milk             | 2  |
| chocolate drink powder | 1  |

Source: F.A.Akindes, 'Urbanisation et développement du secteur informel en Cote d'Ivoire: l'exemple d'Abidjan', (Thèse Doctorat, Ecole des Hautes Etudes en Sciences Sociales, Paris, 1990).

Eating at kiosks was particularly popular with unmarried men needing a quick, cheap breakfast on their way to work. Most clients were manual labourers, students and bureaucrats<sup>22</sup> who, as observed in Chapter 6, transmitted these habits to others around them, especially in the home. Table 42 shows that nearly all urban households in 1984 used milk in one form or another every day.<sup>23</sup> Distribution was via importers and wholesalers from whom retail stores, kiosks and *tabliers* bought.<sup>24</sup>

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<sup>20</sup> F.A.Akindes, 'Urbanisation et développement du secteur informel en Cote d'Ivoire: l'exemple d'Abidjan', (Thèse Doctorat, Ecole des Hautes Etudes en Sciences Sociales, Paris, 1990); Personal experience: observation. All subsequent references to personal experience are for all of the periods 1983-85 and 1986 unless otherwise indicated.

<sup>21</sup> Personal experience: observation during Quaker promotion (1984-85).

<sup>22</sup> Akindes, 'Urbanisation'.

<sup>23</sup> CFCE, 'Les habitudes de consommation et d'achat des foyers urbains Ivoiriens en matière de produits laitiers' (Direction des Produits Agro-Alimentaire, Paris, 1984).

<sup>24</sup> CFCE, 'Marché', p.78; Akindes, 'Urbanisation'; Personal experience: observation; Fieldwork: observation. All subsequent references to fieldwork are for all the period July-December 1990 unless otherwise indicated.

TABLE 42: PERCENT OF URBAN HOUSEHOLDS CONSUMING MILK AND BUTTER, 1984

| CONSUMPTION FREQUENCY          | MILK | BUTTER |
|--------------------------------|------|--------|
| consume everyday               | 63.5 | 36     |
| consume several times a week   | 15.4 | 8.3    |
| consume once a week            | 4.0  | 2.2    |
| consume less than once a week  | 11.5 | 10.8   |
| TOTAL HOUSEHOLDS CONSUMING     | 94.5 | 57.3   |
| TOTAL HOUSEHOLDS NOT CONSUMING | 5.5  | 42.7   |

Source: CFCE, 'Les habitudes de consommation et d'achat des foyers urbains Ivoiriens en matière de produits laitiers' (Direction des Produits Agro-Alimentaire, Paris, 1984).

Table 40 showed that, for the most part, imports of sweetened and unsweetened concentrated milk were fairly similar in quantity. For reasons not entirely clear, the former was the more popular in Abidjan and the latter the more popular in the northern and central areas of the country. One possible answer may be found in Table 43 which shows that sweetened milk was much more used on bread than unsweetened in urban households. If this form of consumption were more common in Abidjan, this would explain the higher consumption of sweetened milk in the capital.

TABLE 43: PRINCIPAL USES OF MILK BY PERCENTAGE OF URBAN HOUSEHOLDS, 1984

|          | % OF URBAN HOUSEHOLDS USING |             |        |
|----------|-----------------------------|-------------|--------|
|          | SWEETENED                   | UNSWEETENED | POWDER |
| coffee   | 68.2                        | 65.5        | 4.3    |
| cocoa    | 13.2                        | 10.2        | 0.6    |
| on bread | 30.2                        | 1.6         | 0.2    |

Source: CFCE, 'Habitudes'.

This table clearly shows just how commonly used concentrated milk has become, especially compared to powdered milk, and most of this consumption took place at breakfast. However, consumption per head at 3.33 litres per year remains very low compared even to the Mediterranean countries of Europe (186

litres per year).<sup>25</sup> Of those not consuming, the main reason given in the survey was price,<sup>26</sup> but, as will be shown later, price may not be the main reason in choosing brand. The widespread use of concentrated milk is greatly facilitated by the fact that consumers and stores do not require cooling facilities. These factors may partly explain the lower consumption of butter even though, in 1990 at least, consumers often bought small portions daily from local stores.<sup>27</sup>

The information so far presented has illustrated that the market for concentrated milk was not only substantial but also has consistently grown, the latter years excepting. The same is also largely true for tinned tomatoes and sardines. Why, therefore, have there been few efforts at promotion of many of the brands available compared to certain other dairy products, cubes and other items? The answer most likely lies in the importing methods, the agency arrangements with overseas suppliers and, as already indicated, the margins allowed to importers by the government. These important factors will now be tackled one by one after which some additional suggestions will be made regarding the lack of promotional activities for many brands.

Importers of concentrated milk, since at least 1950, have been fairly numerous. In 1950 there were at least eleven, in 1980 at least nine and in 1990 at least ten, neither of the latter two figures including the supermarkets which imported only for their own stores. The Société Commerciale de l'Ouest Africain (SCOA), the Compagnie Française de l'Afrique Occidentale (CFAO), the Société Africain de Commerce et d'Industrie (SACI) and the Compagnie Française de la Côte d'Ivoire (CFCI) were the only 1950-vintage suppliers still importing in 1980 and by 1990 SACI had also dropped out. Of the nine known importers in 1980, six were still in the trade in 1990.<sup>28</sup> The reasons for this high

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<sup>25</sup> A.Diaby, 'Dossier industrie laitière: un jumelage d'intérêt national', *Fraternité Matin*, (November 6 1990) p.21.

<sup>26</sup> CFCE, 'Habitudes'.

<sup>27</sup> Fieldwork: observation.

<sup>28</sup> ANCI, 5634/XV-6-45/46: circular, Affaires Economiques, 'Situation des laits à Abidjan' (October 21 1950); CFCE, 'Marché', pp.39-44, 61; Fieldwork:

turnover in importers relate to alleged 'fraudulent competition' (on which more later) and the demise of some of the earlier importers. These facts by themselves need not mitigate against companies promoting concentrated milk as some, maybe most, have been regular importers for a considerable time period.

It is not clear how many brands there were before 1980 but Bonnet Rouge, Mont Blanc, Ideal, Ours, Nestlé, Tatra, Bebe Hollandaise, Coast, La Tour, Kraft, Gloria, Superlait, Farm and Le Geant were all present on the market at one time or another between 1950 and 1980: at least 14 brands in all. For brands existing in 1980, Superlait and Farm can be deducted from this list, leaving 12 in all. In 1990 the number had increased to at least 15 but less than half of the 1980 brands survived: Le Geant, La Tour, Coast, Tatra, Ideal, Ours, Mont Blanc all having disappeared. Another brand, B&B, came and went during the 1980s. The new brands were the three manufactured locally by the Société des industries et des produits alimentaires laitiers (SIALIM), Granlait, Geant and Aboki, plus the imports: Polly, Quatre Vaches, Or Blanc, Anchor, Cow Bell, Carnation, Frico and Tina. It is possible that Carnation and one or two others existed prior to 1980 but no record has been found of them.<sup>29</sup> As with the importers, there is nothing here which should make the promotion of some concentrated milk brands unlikely for at least six appear to have existed for some considerable time. That is, they have brand name recognition.

The key point about importers and brands is that few of the latter were exclusive to the former and some of the former import several of the latter.<sup>30</sup> This was especially true of tinned tomatoes. Concentrated milk was one of the main products bought through the buying house system described in Chapter 5 and imports were often pooled, that is one buying house services and supplies more than one importer for the same brand. Thus for some brands

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discussions with Lebanese traders and DANAFCO salesmen; Interview: Mr. Claude Assouan, Directeur d'Achats at CDCI (Abidjan, December 4 1990).

<sup>29</sup> Ibid; Interview: Mr. N'Gozan, Manager at CDCI in zone 4 (Abidjan, December 12 1990).

<sup>30</sup> Ibid.

there were no agency agreements. C C Friesland Froco, manufacturers of Bonnet Rouge, had a 'gentlemen's agreement' in 1981 with SABIMEX giving the importer the sole rights to their sweetened milk. But for their unsweetened milk there were no fewer than six importers. Rather than C C Friesland dealing with each of the six separately, unsweetened milk was exported by one buying house on behalf of the manufacturers<sup>31</sup> until the late 1970s when Friesland decided to handle exports themselves.<sup>32</sup>

At the same time, some importers dealt in more than one brand of concentrated milk. In 1980 for example, CFAO imported both Bonnet Rouge and Le Geant unsweetened milk. Further, many of the brands imported have appeared and disappeared within a short space of time.<sup>33</sup> All these factors mitigate against the promotion of brands by agents, but this did not mean the manufacturer could not do so. One possible reason why Bonnet Rouge did not was that its domination of the unsweetened milk market, an estimated 91% in 1981,<sup>34</sup> hardly made it worth their while as long as competitors were not doing so. With increased competition during the 1980s, Bonnet Rouge was advertised on television and radio which also coincided with Friesland taking control of exports itself.<sup>35</sup> It is interesting to note that Nestlé, who was both manufacturer and sole distributor, promoted its concentrated milk. Tatra, also imported exclusively, was also promoted.<sup>36</sup> There is though another possible explanation for the lack of promotional effort: margins.

The maximum margin allowed on the vast majority of products was 50%. This meant that if the landed cost of an item was CFA 100, its public retail price could not exceed CFA 150. For all milks, this margin in 1988 was 17.646%. In 1980 the maximum margin appears to have been in the same region, the general principal

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<sup>31</sup> Ibid; Interview: Mr. Kobenan, Director of SCIMPEX (Abidjan, December 10 1990).

<sup>32</sup> Interview: Kloostra.

<sup>33</sup> Ibid.

<sup>34</sup> CFCE, 'Marché', p.42.

<sup>35</sup> Interview: Kloostra.

<sup>36</sup> CFCE, 'Marché', p.79; Personal experience: observation. I have seen television adverts for Nestlé concentrated milk.

being to keep down the price of this widely used product.<sup>37</sup> Consequently, customs duties have also generally been less on milks than on other products.<sup>38</sup> Thus the importers' profit margins on concentrated milk and certain other products like sardines, were extremely low making heavy promotion difficult to justify.

### 7.1.3 SIALIM, *le Jumelage* and Responses to the New Market Situation, 1988 Onwards

Whilst low margins, multiple importers and short-lived brands were deterrents to the promotion of many concentrated milks, the imposition of a quota system in January 1990 was the most compulsive reason yet for abolishing the idea of a publicity budget. *Le jumelage*, as it was known locally, was imposed for the benefit of SIALIM, 60% of it private Ivorian owned. Since 1988, SIALIM has manufactured concentrated milk locally using imported milk powder and local sugar to produce the brands Granlait, Geant and Aboki. Having captured only 25% of the market and rumoured to be staggering towards an ocean of red ink as imported brands competed by cutting prices, SIALIM was rescued by the state in the name of national interest. By this it meant protecting Ivorian jobs and the money invested in SIALIM, maintaining demand for locally produced sugar used in the sweetened milk and lessening the dependence on imports. *Le jumelage* obliged distributors to obtain 40% of their requirements from SIALIM meaning that if distributor X wanted to import 60 cartons of brand Y he would first have to buy 40 cartons of SIALIM milk locally.<sup>39</sup>

Of the reasons given for *le jumelage*, only saving the investments already made seems justifiable. The use of local sugar cut imports but it was produced at three times the world market price. The local manufacture of concentrated milk decreases imports of this

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<sup>37</sup> CFCE, 'Marché', pp.46-48; RCI, 'Arrêté No. 001'.

<sup>38</sup> ANF-SOM, Affaires Economiques, carton 674: Cahier des Douanes, 'Tariffs' (March 15 1945); Cahier des Douanes, 'Tariffs' (December 5 1950); CFCE, 'Marché', p.64.

<sup>39</sup> Fieldwork: discussions with traders and importers; Diaby, 'Jumelage', pp.20-21.

particularly product but increased imports of powdered milk. Finally, import companies, most of which employ more Ivorians than foreigners, probably had to lay off workers. SIALIM, had just 250 employees and not all of them were Ivorians.<sup>40</sup>

Needless to say, *le jumelage* proved none too popular with importers. More importantly, traders and consumers also resented it because SIALIM products were poor quality (the milk went black quickly) and because prices were forced up. So much for the government's concern at keeping basic products as cheap as possible (see above). Many traders who did not have Bonnet Rouge or Nestlé milk said it was because they could not obtain supplies. Further, SIALIM was unable to keep up with demand and was plagued with breakdowns in machinery, technical problems and inadequate capacity.<sup>41</sup> Table 44 below shows the store coverage of the various brands in five interior towns and two districts of Abidjan.

TABLE 44: PERCENTAGE OF STORES STOCKING CONCENTRATED MILK IN 1990, BY BRAND

| BRAND         | ABOISSO | LAKOTA | GUIGLO | FERKE | MARCORY | ATTIE |
|---------------|---------|--------|--------|-------|---------|-------|
| Nestlé        | 66.7    | 90.2   | 72.6   | 84.4  | 82.8    | 81.0  |
| B.Rouge       | 93.8    | 93.4   | 91.9   | 84.4  | 84.4    | 64.0  |
| Gloria        | 29.7    | 29.5   | 1.6    | 5.2   | 10.8    | 10.0  |
| 4 vaches      | 20.3    | 0.0    | 0.0    | 1.3   | 0.5     | 8.0   |
| Or Blanc      | 12.5    | 0.0    | 0.0    | 0.0   | 2.7     | 4.0   |
| Cow Bell      | 6.3     | 19.7   | 0.0    | 0.0   | 1.1     | 4.0   |
| Anchor        | 4.7     | 1.6    | 0.0    | 1.3   | 20.4    | 27.0  |
| Polly         | 0.0     | 0.0    | 0.0    | 0.0   | 0.0     | 22.0  |
| Other imports | 1.6     | 3.3    | 0.0    | 1.3   | 0.5     | 0.0   |
| Geant         | 71.9    | 55.7   | 46.8   | 67.5  | 64.0    | 63.0  |
| Aboki         | 12.5    | 27.9   | 0.0    | 3.9   | 25.3    | 52.0  |
| Granlait      | 62.5    | 41.0   | 22.6   | 59.7  | 58.1    | 54.0  |
| ANY BRAND     | 95.3    | 98.4   | 95.2   | 96.1  | 97.8    | 99.0  |

Source: Fieldwork: regional distribution survey (1990).

Given the quota system, advertising by Bonnet Rouge and probably Nestlé since January 1990 would have yielded limited

<sup>40</sup> Diaby, 'Jumelage', p.20.

<sup>41</sup> Interview: Kloostr; Fieldwork: discussions with traders and with Frederick Attoh, DANAFCO General Manager.

returns given that the former had an estimated 91% of the unsweetened market share and the latter an estimated 32% of the sweetened market share in 1981.<sup>42</sup> In fact, import restrictions helped cut Bonnet Rouge's share of the unsweetened market to just 10%.<sup>43</sup> Whilst Table 44 shows that neither brand had the entire import allocation of their respective markets, promotion was clearly even less justifiable than before given that 40% of the market was out of bounds.

## 7.2 STOCK CUBES

### 7.2.1 Definition, Composition and Uses of Cubes

The cube is a vegetable based dehydrated sauce flavouring. Although there are several different varieties, the basic ingredients are similar - about 50% salt, around 40% vegetable extract and proteins plus some sugar and various flavouring ingredients depending on the type of cube. Other differences between the cubes are the colour of the sauce produced and its saltiness,<sup>44</sup> factors which have played a major part in the performance of various cubes. A further difference is size. Not all cubes are cube shaped but in the trade all dehydrated soups in a compressed form are referred to simply as cubes.<sup>45</sup>

As in Europe today, the cube was used as a flavouring to the sauce of a main dish. The cube was created as a protein supplement for the urban labour forces of European industrial cities in the nineteenth century to make up for the diminished quantities of meat, and consequently meat proteins, consumed: although

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<sup>42</sup> CFCE, 'Marché', pp.42,44.

<sup>43</sup> Interview: Kloostra.

<sup>44</sup> J.Masini, M.Ikonicoff, C.Jedlicki and M.Lanzarotti, Multinationals and Development in Black Africa: a Case Study in the Ivory Coast (Saxon House, Farnborough, 1979), pp.133-134; Fieldwork: discussion with Attoh; DSA: memo, Julian Perea, GB representative, to Marc Cheriaux, DANAFCO General Manager (Aug 1983 or 1984).

<sup>45</sup> Personal experience: observation. Despite this, the rectangular shaped Jumbo was forced by Nestle to remove the word 'cube' from its wrapping. See DSA: memo, E.Bosteen to DANAFCO staff on discussion held in Barcelona (February 8 and 9 1983).



vegetable proteins are not as nutritious as meat ones.<sup>46</sup> However, the consumption of cubes never was encouraged through advertising on this basis and it seems unlikely that consumers were aware of the nutritional benefits of cube consumption.<sup>47</sup> Given that suppliers and manufacturers in the Ivorian market frequently stressed the health properties of their products (even when there aren't any),<sup>48</sup> it seems odd that Nestlé and their competitors did not also stress this angle, which proved a powerful selling tool for many products, but instead concentrated on taste. Adjeuvan, a dried and strongly flavoured fish, was the main flavouring used before the cube became widespread and it continued to be used, either in addition to the cube or by consumers who either did not like or could not afford the cube.<sup>49</sup>

The cube was used in sauces of main dishes, particularly the traditional ones. These take several forms, depending partly on the ethnic group, the most popular being 'grain' which has a reddish colour and is based on palm oil. The sauce usually contains chicken, fish or mutton or a combination of two of the three though in rural areas, biche (deer), agouti (water rat) and monkey are sometimes used. The cereal or starch food which goes with the meat and sauce is usually foutou (plantain banana) whilst rice, tô (maize flower) and placali (manioc flower) are also used. Other flavourings added to the sauce, other than the cube, include oil, red peppers and tomatoes. Most Ivorians prepare one of these dishes for midday consumption.<sup>50</sup> In a 1983 survey of consumers, 90% said they used cubes, 3.4% said they did not and 6.9% did not answer.<sup>51</sup>

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<sup>46</sup> Masini et al, Black, pp.133-134.

<sup>47</sup> Personal experience: observation.

<sup>48</sup> Personal experience: observation; Fieldwork: observation. One example was the Dinor cooking oil television advertisement in November 1990.

<sup>49</sup> DSA: report, untitled, probably prepared by Agence Aujourd'hui, for DANAFCO and GB (n.d. circa 1983).

<sup>50</sup> W.Weekes-Vagliani, Actors and Institutions in the Food Chain: the Case of the Ivory Coast (OECD, Paris, 1985), pp.16-17, 51-55; D.Requier-Desjardins, L'alimentation en Afrique, (Karthala, Paris, 1989), pp.93-104.

<sup>51</sup> DSA: report, untitled, by Agence Aujourd'hui.

### 7.2.2 Nestlé and the Development of the Cube Market, 1965-1978

The first cube to achieve mass distribution was Maggi *Ordinaire* (henceforth referred to as *Ordinaire*), launched in 1965 and known as *l'étoile* or *cube a l'étoile* because of the star symbol which appears on the wrapping.<sup>52</sup> Maggi products were known to a restricted number of consumers since at least the 1940s in the form of *bars potages Maggi* and *tablettes potages Maggi*.<sup>53</sup> However, Maggi products were probably not familiar to the average consumer and known only to a few privileged *indigenes* who were allowed rations of European imports during the years to 1950 by which time most rationing had been abolished.<sup>54</sup> Cubes were also available in supermarkets prior to 1965.<sup>55</sup>

*Ordinaire* was imported and first introduced to the general consumer by Nestlé's Compagnie Africain de Préparations Alimentaires (CAPRAL) through tastings near the principal Abidjan market places. At CFA 10 a portion, little cups of rice with a sauce prepared using the cube were sold. With this, a cube was given free. Despite this promotional activity, the market women were difficult to persuade. It was not until around 1970 that the cube appeared regularly throughout the Abidjan markets, always next to Adjeuvan, the local product it was intended to replace.<sup>56</sup> Even then this was largely because of the continuing policy of extensive giving away of cubes and promotional aids, which at the time consisted only of Maggi logo plastic bowls, teaspoons and a limited number of T-shirts. Wholesale and retail stores played virtually no part in the sale and promotion of the cube at this stage, the former because the market was not yet big enough to interest them and the latter because CAPRAL saw the market place as the natural selling point.<sup>57</sup>

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<sup>52</sup> Masini et al, *Black*, pp.130-131.

<sup>53</sup> ANCI, 5874/XV-15-15: invoice, SCOA to Légion Française (November 11 1942): invoice, SCOA to Légion Française (October 31 1942).

<sup>54</sup> Thompson and Adloff, *French*, pp.436-437.

<sup>55</sup> Interview: Doh Gilles (1st.).

<sup>56</sup> Ibid; Masini et al, *Black*, p.133. According to Doh Gilles, the price had risen to CFA 25 per portion by 1970.

<sup>57</sup> Interview: Doh Gilles (1st.).

From 1970, CAPRAL began to promote their cube in the interior of the country, starting with Bouake before moving into other towns, progressing from larger ones like Man, Korhogo, Daloa and Abengourou to smaller ones, eventually reaching into the villages. Each step was taken only once the cube had been established in the preceding market. Throughout this period, tastings and gifts of free cubes and a limited range of publicity items were used to promote the spread of the product. As the cube gained popularity, wholesalers were set up in each town to cater for local demand when the Maggi promoters were elsewhere. Wholesalers were granted a credit period of thirty to sixty days and a bonus or incentive at the end of the year based on quantity sold.<sup>58</sup>

Until 1978, CAPRAL virtually had a free reign on the cube market (the exception being the Honic cube which was never supported by extensive promotion)<sup>59</sup> and profited from rapidly increasing sales through expansion of the market. Between 1973 and 1975 sales increased from CFA 408 million to CFA 1,012 million. The economics of this scale of consumption, combined with sales to neighbouring countries, led to Nestlé establishing a new company, Nouvelle Alimentation (NOVALIM), to manufacture the cubes locally. NOVALIM also took over distribution and marketing activities from CAPRAL. By 1977, cube consumption equalled two *Ordinaire* cubes per household per day.<sup>60</sup> In 1978 though, the situation began to change rapidly as the introduction of a new cube not only revolutionised the trade but also led to Nestlé losing almost 50% of its virtual 100% market share in the years up to 1978. The view expressed by Masini et al around 1977 that "the local establishment of a unit by another corporation is highly unlikely . . . CAPRAL has some assurance of retaining a monopoly of sales of the product"<sup>61</sup> was about to be spectacularly disproved.

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<sup>58</sup> Ibid; Masini et al, Black, p.133; Interview: Mr. Frederick Attoh, DANAFCO General Manager (Abidjan, September 1990); Benoit Yoboue, DANAFCO Salesman (Abidjan, July 16 1990).

<sup>59</sup> Fieldwork: discussion with a MEFCO Manger (September 1990), the importer at the time.

<sup>60</sup> Masini et al, Black, p.131.

<sup>61</sup> Ibid, p.132.

### 7.2.3 The Launching of Jumbo: Breaking the Monopoly, 1978-1984

One of the minor cubes which appeared briefly on the market in the 1970s was the Gallina Blanca cube, not much different from *Ordinaire* in quality or wrapping and identical in size. This cube had limited success and was little promoted but the experiment by the Spanish company Gallina Blanca (GB)<sup>62</sup> through their representatives, the Danish Africa Company (DANAFCO),<sup>63</sup> led to the introduction of a new product in 1979, the design and shape of which were the innovative ideas of the local representatives.<sup>64</sup> The Jumbo cube was rectangular in shape, weighed nine grams and was three times the size of *Ordinaire* with a crown on the red and yellow wrapping. It was marketed with the slogan '*le roi des cubes*' and the aim was to establish its identity through the crown just as Maggi had exploited the star on their cube.<sup>65</sup> This rectangular cube proved such a success that, within two years of it being launched, a manufacturing company, Société Africain de Fabrication Alimentaire (SAFA), was set up with the technical assistance of GB.<sup>66</sup> Nestlé responded inadequately to the new product until 1984, a mistake which was to prove very costly, as the table below illustrates.

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<sup>62</sup> A subsidiary of the American multinational Borden. Gallina Blanca was in fact the parent company of Broex which in turn was the parent company of GB's Ivory Coast marketing arm, ESMISA, and its Spanish raw material manufacturer PASA. For clarity, all will be referred to as GB.

<sup>63</sup> Part of the Jersey based West Africa Holdings (WAH).

<sup>64</sup> Interview: Attoh; DSA: letter, E.Bosteen to GB (Barcelona) (November 19 1980), p.4.

<sup>65</sup> Personal experience: observation: discussions; Interview: Mr. Eric Bosteen, Chairman of West Africa Holdings, parent company of SAFA and DANAFCO (Abidjan, 1st. interview, November 15 1990)

<sup>66</sup> Interview: Attoh: E.Bosteen (1st.).

TABLE 45: VOLUME OF CUBE SALES IN TONNES AND PERCENT MARKET SHARE

| YEAR | JUMBO |    | MAGGI |    | TANTI |   | OTHERS |   | ALL  |
|------|-------|----|-------|----|-------|---|--------|---|------|
|      | vol   | %  | vol   | %  | vol   | % | vol    | % | vol  |
| 1973 |       |    | 250   |    |       |   | ?      |   | ?    |
| 1974 |       |    | 275   |    |       |   | ?      |   | ?    |
| 1975 |       |    | 600   |    |       |   | ?      |   | ?    |
| 1976 |       |    | 1140  |    |       |   | ?      |   | ?    |
| 1977 |       |    | 1500  |    |       |   | ?      |   | ?    |
| 1978 | 268   | 12 | 2012  | 86 |       |   | 45     | 2 | 2325 |
| 1979 | 560   | 21 | 2076  | 78 |       |   | 31     | 1 | 2667 |
| 1980 | 625   | 21 | 2250  | 75 |       |   | 124    | 4 | 2999 |
| 1981 | 1225  | 38 | 1883  | 58 |       |   | 120    | 4 | 3228 |
| 1982 | 2026  | 43 | 2533  | 54 |       |   | 105    | 4 | 4664 |
| 1983 | 2049  | 45 | 2000  | 44 | 350   | 8 | 120    | 3 | 4519 |
| 1984 | 2351  | 52 | 1854  | 41 | 181   | 4 | 136    | 3 | 4521 |
| 1985 | 2109  | 44 | 2301  | 48 | 288   | 6 | 144    | 3 | 4793 |
| 1986 | 2061  | 40 | 2886  | 56 |       |   | 155    | 3 | 5153 |
| 1987 | 1875  | 40 | 2672  | 57 |       |   | 141    | 3 | 4688 |

Sources: Estimated from: J.Masini, M.Ikonicoff, C.Jedlicki and M.Lanzarotti, Multinationals and Development in Black Africa: a Case Study in the Ivory Coast (Saxon House, Farnborough, 1979), pp.130-131; DSA: internal report, Bohan International, 'Resultats de l'étude quantitative réalisée en avril-mai 1984': sales figures: internal report, Agence Aujourd'hui, 'Jumbo: relevé des achats' (1985).

The launching of Jumbo was very different to that of Maggi. DANAFCO intended to tap into the Dioula trading network and use word of mouth to promote the product. As an inducement, margins exceeded those of *Ordinaire* and immediately attracted opportunistic Lebanese wholesalers who, looking for rapid turnover, passed on much of the margin to semi-wholesalers and market traders. Credit was only given to clients DANAFCO already knew. Others, mostly Lebanese, were sold to on cash.<sup>67</sup> Further inducements were the re-usable metal-rimmed cardboard drums in which the cubes were sold, the quality of the product and the novelty of its size.

This launch strategy enabled DANAFCO to reduce the risk of bad debts whilst the use of word of mouth meant minimal publicity costs. The rapid turnover induced by the generous margins meant temporary price instability but also gave Jumbo the reputation of a product that moved. Such an attitude, especially amongst traders, is vital if a product is to succeed because African traders

<sup>67</sup> Interview: Attoh.

tend not to be easily persuaded otherwise once they have gained an impression of a product, a point explored in more detail later.<sup>68</sup> As the sales of Jumbo expanded, an increasing number of semi-wholesalers who had previously bought from the Lebanese, principally Malien Malinkes and Guineans, came directly to DANAFCO and, after a trial period, were adopted as regular Jumbo credit clients. Thus the market situation gradually stabilised as many Lebanese were increasingly cut out in favour of African wholesalers who were more inclined to observe supplier-stipulated semi-wholesale and retail prices.<sup>69</sup>

Once Jumbo was established, margins for traders were cut to around the level of *Ordinaire* and by 1983 they were substantially less at all levels of the trade as Table 46 below shows.<sup>70</sup>

TABLE 46: MARGINS ON VARIOUS CUBES IN 1983

| TRADE LEVEL    | JUMBO  | SUPER MAGGI | MAGGI <i>ORDINAIRE</i> |
|----------------|--------|-------------|------------------------|
| retail         | 8.57%  | 10%         | 16%                    |
| semi-wholesale | 3.125% | 3.7%        | 6.8% (a)               |
| wholesale      | 4% (b) | (c)         | 5% (d)                 |

(a) 2 percentage points of this given monthly in produce. (b) 2 percentage points of this given annually in produce. (c) At this time, Maggi Super was only distributed through retailers and semi-wholesalers. (d) 3 percentage points in produce on purchase and 2 percentage points in produce per trimestre.

Sources: DSA: internal report, unknown author, 'Comparison structure de prix et profit par produit et par intermédiaire' (n.d., circa 1984): internal report, unknown author, 'Etude commerciale Jumbo', p5.

Two main factors, also vital in the launch phase, enabled Jumbo to increase its market share between 1978 and 1984 whilst cutting trader margins. The first concerned hidden benefits, principally the re-usable drum. Many authors have noted the way in which product containers are re-used time and time again. Quaker Oats, Milo and Chocodi are only a few products which have benefitted from this habit which, apart from being an added incentive to

<sup>68</sup> Personal experience: discussions with salesmen and traders.

<sup>69</sup> Interview: Attoh.

<sup>70</sup> Ibid; DSA: internal report, 'Comparison structure de prix et profit par produit et par intermédiaire' (n.d. circa 1984): report, 'Etude commerciale Jumbo' (1983), p.5.

buy, provides free advertising as many containers are used in public, especially on market stalls. The drum became popular with all levels of traders. Market women put local produce in them and Lebanese wholesalers had rows of drums in front of their counters containing machetes, rolled up carpets, rice, salt and other items.<sup>71</sup>

The other main factor related to the product itself, its size, quality, and the sauce colour it produced. There being little spent on publicity, the principal transmitting agent of these product advantages was word of mouth. Word of mouth involved relying on traders to speak favourably of the cube to relatives and friends as well as other traders. Traders were also substantial consumers because of their close contact with products and their considerable numbers. Given the low newspaper circulation, low number of television and radio sets and other communication deficiencies compared to more developed economies,<sup>72</sup> word of mouth represents a crucial aspect of information diffusion in markets like Ivory Coast, especially given the Dioula network. Thus, word of mouth has remained a principal characteristic of informal sector manufacturers and distributors whilst being only half-heartedly accepted by many in the formal sector. This is despite studies showing that, even in industrial economies, personal recommendation of products is not only very common but also often more effective than less personal media campaigns.<sup>73</sup>

The size was important for two reasons. First, consumers and traders gained the (false) impression that Jumbo was cheaper than *Ordinaire* because it looked more than three times the size but cost only three times as much (CFA 15 to *Ordinaire's* CFA 5). Second, Jumbo's size gave it a novelty aspect which got it noticed.<sup>74</sup>

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<sup>71</sup> Personal experience: observation.

<sup>72</sup> D.Bollinger, Le marketing en Afrique, tome 1: La Cote d'Ivoire (CEDA, Abidjan, 1977), pp.171-189.

<sup>73</sup> See, for example, E.Dichter, 'How word-of-mouth advertising works', Harvard Business Review, 44 (November-December 1966), pp.147-166.

<sup>74</sup> Personal experience: discussions with E.Bosteen, Chairman of DANAFCO, and DANAFCO salesmen; Interview: Attoh.

On quality, the Jumbo cube was superior in both wrapping and taste, points conceded in private even by most Maggi salesmen.<sup>75</sup> Wrapping is very important in a hot and humid climate for, if exposed to the sun, the cube deteriorates rapidly. The high salt content of the product also means that the cube absorbs moisture from the air and goes soft. *Ordinaire* cubes sometimes appeared on the market with the wrapping undone, leading to rapid deterioration. Jumbo also produced a darker, richer sauce which was preferred by the consumer, especially in the north.<sup>76</sup>

Finally, despite decreasing margins, Jumbo never lost its image as a profitable product to handle. The re-usable drums, which could also be sold back to DANAFCO, and, later, publicity material, provided hidden benefits. Additionally selling Jumbo was low risk compared to Maggi because the Jumbo market was more stable (on which more later) and because of less spoilt stock.<sup>77</sup>

The success of Jumbo was probably instrumental in the decision to launch a third brand of cube in 1983. Préparations Alimentaires (PREPAL), an Ivorian company, manufactured, marketed and distributed the Tanti cube from their factory in Bouake. Tanti was the same shape, size and price as Jumbo but that was there the similarities ended. The cube produced a weak sauce and was so poorly wrapped that many appeared on market tables dirty and oozing liquid. That it achieved an 8% market share in 1983, its highest, was largely due to the giving away of large quantities of cubes to market traders. It failed to achieve dominance in any region of the country or amongst any group of consumers.<sup>78</sup>

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<sup>75</sup> Personal experience: discussions with DANAFCO and Maggi salesmen. On up-country trips it is not uncommon for salesmen from rival companies to congregate at the same hotels.

<sup>76</sup> Interview: Attoh; Personal experience: discussions with DANAFCO salesmen and Abdoul Mourad, DANAFCO Jumbo Marketing Manager (1984-85).

<sup>77</sup> Ibid; Personal experience: observation.

<sup>78</sup> DSA: memo, Perea to Cheriaux (August 1983 or 1984): report, Bohan International (parent company of Agence Aujourd'hui), 'Resultats de l'étude quantitative réalisée en avril-mai 1984': memo, Jean-Francis Amavi, DANAFCO Marketing Manager, to M.Cheriaux titled 'Objet: augmentation de prix Jumbo' (October 20 1982), p.7; Personal experience: discussions with salesmen: observation.



TABLE 47: MARKET SHARE OF CUBES IN INTERIOR TOWNS, MID 1983

| TOWN        | ETHNIC GROUPS    | MAGGI | JUMBO | TANTI | OTHER |
|-------------|------------------|-------|-------|-------|-------|
| Odienne     | Malinke          | 17.4  | 80.6  | 1.4   | 0.4   |
| Tingrela    | Malinke          | 30.0  | 52.0  | 18.0  | 0.0   |
| Ferke       | Senoufo          | 39.3  | 57.9  | 2.2   | 0.2   |
| Man         | Yacouba, Malinke | 27.6  | 64.0  | 6.0   | 3.0   |
| Guiglo      | We               | 27.2  | 72.0  | 0.3   | 0.0   |
| Touba       | Makinke          | 71.0  | 25.0  | 0.2   | 3.6   |
| Bouafle     | Gouro            | 49.8  | 49.7  | 0.2   | 0.0   |
| Seguela     | Malinke          | 43.5  | 55.6  | 0.7   | 0.0   |
| Gagnoa      | Bete, Baoule     | 83.2  | 16.3  | 0.5   | 0.0   |
| Divo        | Dida             | 61.2  | 38.8  | 0.0   | 0.0   |
| San Pedro   | Krou             | 59.8  | 39.0  | 0.7   | 0.3   |
| Soubre      | Bete             | 64.6  | 29.2  | 6.2   | 0.0   |
| Bouake      | Baoule, Dioula   | 46.0  | 46.7  | 1.6   | 5.0   |
| Daoukro     | Baoule           | 37.0  | 63.0  | 0.0   | 0.0   |
| Yama        | Baoule           | 52.1  | 47.2  | 0.4   | 0.0   |
| Bondoukou   | Abron, Koulango  | 32.8  | 62.7  | 4.3   | 0.0   |
| Agnibilekro | Agni             | 75.0  | 23.2  | 1.6   | 0.0   |
| Abengourou  | Agni             | 55.4  | 40.9  | 0.5   | 0.0   |
| Tiassale    | Agni, Baoule     | 74.4  | 25.5  | 0.0   | 0.0   |
| Adzope      | Attie            | 54.1  | 45.9  | 0.1   | 0.0   |
| Aboisso     | Agni             | 83.3  | 12.1  | 0.0   | 4.5   |

Sources: RCI, *Population de la Cote d'Ivoire 1975* (Ministère de l'Economie, Abidjan, 1984); DSA: internal report, J.Ayirebi, 'Market Survey on Jumbo Cubes and Competitive Brands in the Interior of the Ivory Coast' (May-July 1983).

Table 47 above and other sources show that the Jumbo and Maggi brands each had their strengths and weaknesses relating to ethnic groups and rural-urban areas. Jumbo was more popular amongst Muslims in both rural and urban areas, most of whom are in the north and are from the Malinke, Senoufo and Koulango ethnic groups, plus many Maliens, Burkinabes and Guineans. Jumbo was also biggest selling cube in Abidjan by 54.4% to Maggi's 38.3% (compared to 51.8% to 43.1% in all rural areas) in late 1984.<sup>79</sup> Maggi was much favoured by the Agni and the Bete in rural and urban areas and by most non-Muslims in all rural areas.<sup>80</sup> Finally, market research in 1984 showed that there were no major differences in cube preferences according to age, income group or

<sup>79</sup> DSA: internal report, Agence Aujourd'hui, 'Jumbo: relevé des achats' (1985).

<sup>80</sup> DSA: internal report, J.Ayirebi, 'Market Survey of the Abidjan Area' (1983).

household size except that Jumbo, inexplicably, was preferred by the over 55s.<sup>81</sup>

The reasons for the aforementioned cube strengths and weaknesses are mostly not difficult to discern. Maggi's strength in most rural areas was due to Jumbo's poor rural distribution network caused in part by the low margins which made transportation of Jumbo by traders from wholesalers in towns to the villages an unprofitable exercise. Jumbo's weakness in some of the Agni and Bete towns, and Nestle's in locales like Man, was partly due to problems with wholesalers<sup>82</sup> but in other areas there is no ready explanation. In most towns, Jumbo's superior quality and solid distribution were enough to give it the edge. Its strength in the rural north was most likely due to the high proportion of muslims who were traders or who knew traders.

The acceptance of *Ordinaire* by consumers had been largely due to hard work on the part of CAPRAL salesmen and promoters. Jumbo's challenge was to compete with a well established and popular cube, so well established that in 1982, of 110 Abidjan women shown the Jumbo cube and asked 'Do you know this product?', 64 called it Maggi. On being questioned further and asked to name the product, only 42 answered Jumbo whilst 50 said Maggi and 18 did not know. When asked the same question about Maggi, all but three respondents gave the right answer.<sup>83</sup> That Jumbo took such a large share of the market despite this identity problem, says much for the strengths of the product.

The different marketing strategies used by Nestlé and DANAFCO, and generally adhered to by them in releasing future cubes, are similar in their psychology and execution to slow and fast release strategies used by the film industry. Slow release involved showing films on a limited number of screens to create favourable word-of-mouth publicity after which it was given a wider release, sometimes by stages. This strategy was often used if the

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<sup>81</sup> DSA: Bohan International, 'avril-mai 1984'.

<sup>82</sup> Personal experience: discussions with traders and salesmen (1983-85).

<sup>83</sup> DSA: internal report, Agence Aujourd'hui, 'Etude sur le produit Jumbo' (1982).

distributor was unsure of the immediate market appeal of a film.<sup>84</sup> This strategy was used by CAPRAL in the launching of *Ordinaire* when the market for the product had to be created. The fast release strategy was mostly used where the distributor felt there was a "built-up demand" for a film, like, for example, the James Bond films where the earlier pictures had already created a 007 market.<sup>85</sup> This strategy was used by Jumbo which was launched into a market that had also already been created. Using the wrong release strategy could kill any chance of a film being a hit and this, as is shown later, was one of the reasons behind the failure of the Jumbo Fish cube.

#### 7.2.4 Nestlé Hits Back: 1984 Onwards

The most likely explanation for Nestlé's slow response to the threat posed by Jumbo is that the company was unaware as to the extent of the erosion of its market share. Table 45 shows that the market expanded every year between 1973 and 1982, allowing *Ordinaire* sales to increase until 1981 when they declined sharply. By this time at the latest Nestlé should have realised that Jumbo was no temporary phenomenon like so many cubes before it. However, the national economic decline from around 1979 possibly led to them believing the fall in sales to be inevitable. The substantial rise in 1982 probably increased this feeling of false security *vis à vis* Jumbo. Not until a further decline occurred in 1983, followed by another in 1984, did Nestlé take concerted action, part of which involved the sacking of most of NOVALIM's top management by Nestlé Switzerland in 1984.<sup>86</sup> NOVALIM's policy response had three major components. Before going into details on these three points it is necessary to place them in the context of the organisation and resources of the two main rivals sales' forces and distribution networks in the mid 1980s.

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<sup>84</sup> T. Balio, United Artists: the Company that Changed the Film Industry (University of Wisconsin Press, Madison, 1987), pp.207-210.

<sup>85</sup> Ibid., pp.210-212.

<sup>86</sup> Fieldwork: discussion with E. Bosteen.

NOVALIM divided the country into four zones, each supervised by a sales inspector with 22 vans stationed permanently in the main towns. These vans distributed all Nestlé products and were supplemented by six promotion and publicity vans and four vans used exclusively for tastings. In each of the main towns there was a stockist/wholesaler who fetched stock himself from Abidjan which the NOVALIM van then sold. Special price concessions ranged from 2% to 9% on top of the usual margin. In addition, there were other wholesalers who also had to fetch stock from Abidjan but on less favourable credit terms and with only occasional assistance in selling from NOVALIM.<sup>87</sup>

The DANAFCO system was rather less ambitious but effective in the use of its more limited resources. The country was divided into two zones, controlled by management in Abidjan and Bouake, of five and six sectors respectively. Every major town was visited once a month by one of two lorries whose main purpose was to deliver to the wholesalers on strict credit conditions of 30 days date of invoice. In addition there were three promotion vans whose trips were timed to coincide with those of the delivery lorries so that the delivery salesman doubled up as a promoter, selling from the promoters' van to semi-wholesalers and market women where distribution links were weak. The promotion vans were also responsible for supplying small towns and villages where there were no wholesalers. Most wholesalers in the Abidjan zone were Lebanese, the capital itself excepted. In the Bouake zone most wholesalers were African, usually Malinke from Mali, partly because there were fewer Lebanese in the north and west and partly because of greater emphasis on working through traditional channels of distribution by the Bouake management. In all, there were ten vans working on the Jumbo cube. In addition, both Jumbo and Maggi cubes were wholesaled by 23 CFCI outlets situated in major commercial towns throughout the country.<sup>88</sup>

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<sup>87</sup> DSA: memo, untitled, notes on a leaked NOVALIM report (1985).

<sup>88</sup> Interview: Attoh; Personal experience: discussions Attoh, Mourad and salesmen: observation.

The first element of NOVALIM's policy response, introducing further cubes into the market, gained extra space on market tables and tied up trader resources at all levels so that they had less to invest in rival cubes. More important though was the attempt to usurp Jumbo's benefits of size and novelty by the introduction of the Maggi Super cube in late 1981. The appearance of this cube, at first cheaper than Jumbo, initially had serious effects on DANAFCO sales (a decline of around 30%) but NOVALIM were unable to consolidate the good start made because of the poorer quality of the cube both in taste and wrapping and because they were unable to maintain the lower price. After the first few months, Super ended up taking market share from *Ordinaire* instead.<sup>89</sup>

NOVALIM apparently had failed to grasp all of the elements of the reasons for the success of the Jumbo cube, the most important of which was quality. Other cubes introduced by NOVALIM were beef and chicken in 1985, both shaped like Super, and a larger version of *Ordinaire* called Maggi Grotto in 1986.<sup>90</sup> None of these cubes made substantial inroads into the market but they did give the Maggi range a much greater visual presence on market tables.<sup>91</sup>

The second component of NOVALIM's policy had mixed results. Selling on more generous terms to every wholesaler of the Jumbo cube proved effective in tying up their financial resources and limited the amount of stock DANAFCO could safely advance many clients. Thus DANAFCO was forced to look for new clients, mainly Lebanese, that they had previously rejected as less efficient and reliable regarding price cutting and credit risk. In towns where the distribution of Jumbo was in the hands of these new clients,

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<sup>89</sup> DSA: internal report, Rene Oulai, DANAFCO Salesman, untitled (July 29 1982); internal report, Agence Aujourdhui, 'Synthèse et conclusions du sondage sur les semi-grossistes et détaillants au sujet de l'évolution du marché du grande cube depuis le lancement de super Maggi' (Jan 1984); Interview, Benoit Yoboue, DANAFCO salesman 1980-92 (19-9-1990); Personal experience: discussions with salesmen (1984-85).

<sup>90</sup> Interview: Doh Gilles (1st.).

<sup>91</sup> Interview: Yoboue; DSA: internal report, Agence Aujourdhui, 'Etude marché Jumbo' (July 1987).

the cube's market share was usually weaker. The strategy did not always work, though, for the Jumbo stranglehold on some markets, like Odienne, Man, Anayama and Abidjan-Koumassi was achieved by building up African semi-wholesalers of local produce into Jumbo wholesalers. The new status bestowed on them made them very loyal to the brand behind their success. Also, the deliberate destabilisation of the Maggi market came at a cost for it caused problems for the established wholesalers who either had to cut prices to compete or be satisfied with a slower turnover.<sup>92</sup>

NOVALIM also became more flexible in the granting of credit and in the prices they sold at in areas where distribution was weak. This proved effective in maintaining adequate market coverage but often led to price cutting and instability when a wholesaler being granted such favours in one sector decided to increase turnover by transporting stock to areas where wholesalers were granted less favourable conditions.<sup>93</sup> In summary, NOVALIM's more flexible policy regarding wholesalers did cause problems for DANAFCO but also disrupted their own markets.

The third element of NOVALIM's policy led to an intensification of the tactic of selling wholesaler's stock to retail stores and market traders. The benefits to Maggi where links in the chain of distribution were weak was self-evident but the tactic was also used elsewhere. A substantial edge in coverage at the shop level would have been of little benefit as turnover from this type of outlet was very limited unless the shop retailer was in a village with no wholesalers or was placed near a market and acted as a semi-wholesaler to the market women. Even then, it was likely that an existing wholesaler already had a network of semi-wholesalers selling to the market women.<sup>94</sup>

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<sup>92</sup> Interview: Attoh; DSA: credit client sheets (1980-86); Personal experience: discussions with traders (1983-85).

<sup>93</sup> Interview: Attoh; Personal experience: discussions with salesmen and traders (1983-85).

<sup>94</sup> DSA: J. Ayirebi, 'Abidjan Area': memo, untitled, leaked NOVALIM: internal report, J. Ayirebi, 'Jumbo Cube Promotion' (October 1983); Personal experience: observation: discussions with Mourad.

However, most NOVALIM vans also sold other Nestlé products, some of which did not have a comprehensive wholesale network. By offering to sell Maggi cubes on behalf of the wholesaler, Nestlé was able to convince them to stock their other products which they also sold on their behalf, thereby making the link between the wholesaler and retail stores which was previously missing and hampering extensive distribution of non-Maggi products. In effect, the wholesaler became little more than a stockist, as his contact with retailers was limited and he provided no services to them, only to the supplier. Whilst the benefit to the Maggi cube was limited, to other Nestlé products it was substantial. A further aim was to monitor the space given on tables to Maggi or to discourage traders from displaying Jumbo altogether. In this, promoters used free cubes and publicity materials but neither had much effect. There were many incidences where free cubes induced traders to continue stocking a product even though they were unhappy about the speed of its movement off the tables, but few were persuaded to stop trading in Jumbo. Wholesalers and retailers usually sold the cubes for extra profit or sometimes cut the price of all of their stock to induce faster turnover, thereby disrupting the market. At the wholesale level, free cubes were rarely passed on to the retailers as usually intended and market women were in a poor position to insist on their free goods because most bought on credit from the wholesalers. Other than to ensure the presence of Maggi cubes, it is not clear why NOVALIM continued with this policy for DANAFCO tried it and found the effects to be more disruptive than beneficial.<sup>95</sup>

Publicity materials, given mostly at the time and point of sale, were an essential backup to other activities in the field. They included the Maggi logo plastic sheet which market women used to cover their tables. But when cubes of all varieties were in place, the logo was usually no longer visible. Other publicity items, such as T-shirts and plastic carrier bags, were probably more effective because they were exposed to the public eye and always used

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<sup>95</sup> Interview: Doh Gilles (1st.): Yoboue; DSA: internal report, Ayirebi, 'Promotion'; Personal experience: discussions with market traders (1983-85).

until no longer serviceable. Plastic bags, mainly distributed for Jumbo, were often sold and provided hidden benefits. Both NOVALIM and DANAFCO used bowls made of either plastic or metal which were popular with women traders but these were rarely seen outside the home.<sup>96</sup>

Television and radio advertisements were also very popular with traders as promotional aids because they gave them confidence in a product. NOVALIM had an advantage in both quality and quantity in this area: their combination of simple story lines, happy families and catchy tunes proved more popular than the rather convoluted Jumbo advertisements which consumers found difficult to follow. The benefits of advertising, discussed in Chapter Six, are difficult to assess given the loyalty of consumers to their chosen brands.<sup>97</sup> That the cube market continued to expand until 1987 despite declining incomes may have been due to advertising as consumer oriented promotions had largely ceased by then. The volume of television commercials was such they could not have passed unnoticed by even the occasional viewer, especially given the increase in the number of television sets per thousand of population (see Chapter 6). Seventy 30 second spots for Jumbo alone were bought for the last three months of 1985, at a cost of nearly CFA 28 million.<sup>98</sup> Maggi had approximately double this number for most of 1985.<sup>99</sup>

#### **7.2.5 Jumbo and Tanti: Responses to the New Market Situation, 1985 Onwards**

On Tanti, there is little to say other than that the quality of the cube and its wrapping fatally undermined any chances of success despite, as shown below, sound advertising and heavy field promotion. For Jumbo, the case is less clear cut but it is evident

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<sup>96</sup> Ibid.

<sup>97</sup> DSA: internal report, Agence Aujourd'hui, 'Post-test de la campagne télévisée "Jumbo Cube" ' (March 1983).

<sup>98</sup> DSA: memo, Agence Aujourd'hui to SAFA, 'Espace télévision - octobre, novembre, décembre 85' (September 13 1985).

<sup>99</sup> Personal experience: discussions with Marc Cheriaux, DANAFCO General Manager, later at Ducros (Cote d'Ivoire) and Mourad (1985).



that seven factors besides the Nestlé onslaught contributed to its decline. First, Jumbo's size, initially a novelty, lost that advantage and also had drawbacks. The introduction of Tanti and Super in 1983 and other large Nestlé cubes later removed Jumbo's novelty value which, over time, would have lessened anyway. Size also meant a price three times the outlay for one *Ordinaire* and poorer consumers, used to buying everyday, were not always prepared to make this financial commitment at one given moment. Nor did the size suit the smaller family unit; one Jumbo made enough sauce for five people whilst *Ordinaire* could be used more flexibly without having bits of cube left over.<sup>100</sup>

Jumbo's size also meant less flexibility when the price rose. With the CFA 5 piece the smallest coin in circulation, DANAFCO had to raise the price (in 1983) from CFA 15 per unit to CFA 35 for two units as CFA 20 per unit would have been too large an increase. The disadvantage with the new price was the size of the outlay and the large quantity acquired at one moment. Some traders consequently retailed at CFA 20 per unit, leading to market instability, although DANAFCO did withhold stocks causing prices to rise and facilitating the real increase.<sup>101</sup> *Ordinaire*, being in smaller units, had more flexibility in this respect.

The second factor was the failure to introduce a backup product quickly enough. One idea put forward by DANAFCO was to provide a powder for use in restaurants but, largely due to GB's lack of interest, this was never introduced.<sup>102</sup> Thus the only backup item marketed by 1984 was a packet of ten cubes in tablette form exclusively for sale in retail outlets. DANAFCO first proposed the idea in February 1982,<sup>103</sup> GB took two years to approve it. However, this was neither a new product nor one for the mass

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<sup>100</sup> Interview: Doh Gilles (1st.); Yoboue: E.Bosteen (1st.); Personal experience: observation.

<sup>101</sup> DSA: internal report, J.Amavi, 'Définition/orientation des actions promotionnelles et publicitaires 1984/1985' (June 1984): minutes, meetings on 8 and 13 November 1982 between DANAFCO and GB.

<sup>102</sup> Personal experience: discussion with Mourad who's idea it was (1984).

<sup>103</sup> DSA: memo, M.Chériaux (DANAFCO) to GB, 'Commentaires sur le rapport établi par MM.Aliaga, Perea et Carisey au sujet visite de marchés sur la Cote d'Ivoire.' (December 2 1983), p.3.

market. Supermarkets, catering mainly for Europeans, were marginal to the cube trade though some effort was expended in their direction because any cube stocked by a supermarket gained more of a quality image. The innovation generated few extra sales as most small African shops refused to take the product due to it being more expensive per cube and because European consumption of cubes was marginal.<sup>104</sup> Further, competition in supermarkets was stiffer as brands such as Knorr, Leibig, Samba and Oxo were better known to Europeans. NOVALIM were more adventurous, developing a cube shaped packet of thirty Maggi *Ordinaire* cubes and supplying tins of fifty cubes as well as smaller packages of their larger beef and chicken cubes.<sup>105</sup>

A 1988 ORSTOM report noted that,

La fabrication des cubes a connu un essor fulgurant: le succes du produit et la concurrence entre les deux principaux fabricants (Nestlé, Jumbo) les amene a amorcer depuis un an un processus de diversification du produit.<sup>106</sup>

In fact, product backup did not take until 1987 to arrive even for Jumbo but it was not until that year GB and DANAFCO came up with a sound product. The introduction of Jumbo Chicken in 1987 followed the disastrous attempt at marketing a fish cube in 1985 (detailed below). This badly needed product enabled the Jumbo brand to halt the decline in market share with 40% in 1987, the same as the previous year. However, the limited market data available indicates that most of Chicken's sales came from the original Jumbo rather than from Maggi.<sup>107</sup>

The third factor was the poor quality of Jumbo advertising. Whilst remedying this factor alone might have made little difference (one

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<sup>104</sup> DSA: stock ledger (1984-88); invoices (1984-88); Personal experience: discussion with Mme Roselyn Theze, Chargés des Supermarchés at DANAFCO, previously at Abinader.

<sup>105</sup> Fieldwork: brand range survey (1990).

<sup>106</sup> G.Courade, I.Droy and D.Harre, 'Evaluation des habitudes à la consommation des produits alimentaires en Cote d'Ivoire: rapport principal 2' (ORSTOM, 1988).

<sup>107</sup> DSA: internal report, Agence Aujourd'hui, 'Etude marché Jumbo' (July 1987); letter, E.Bosteen to GB (March 16 1987); sales ledger (1986-87).

of the most popular advertisements was for the Tanti cube), a clearer message might well have helped.<sup>108</sup> Poor advertising also played a part in the fourth Jumbo weakness, the marketing and very concept of the Jumbo Fish cube. Whilst generally accepted as a high quality product, Jumbo Fish was almost universally rejected by both traders and consumers at all social and professional levels. The reasons for this are not easy to assess from the consumer point of view but they may well be summarised as poor quality media advertising and a lack of need for a cube that could only be used in fish sauces. At the all important trader level, consumer rejection was partly a cause and partly a consequence of trader rejection. Trader pessimism was quick to set in once sales slowed after the initial launch and from that point on there was virtually no turning back. The novelty value of a larger cube was no longer there.<sup>109</sup>

Further, the marketing was badly planned and executed. The Fish cube was launched throughout the country at all levels of trade in one go, a fast release strategy for a product which, because it was fish flavoured, was radically different from the beef cubes. Moreover, at the same time as wholesalers were being delivered across the country, over 20 promoters and salesmen were selling directly to market women and giving away large quantities of free cubes. Consequently, the wholesalers' stock did not move and they became pessimistic, a pessimism fueled by shop and market retailers who encountered widespread consumer ignorance of the product because the television and radio advertising campaign started a month after the launch. Consequently, retailers sold the stock they had and did not go back to the wholesaler for more.<sup>110</sup>

If the above is compared to the methods used in the launching of Maggi Super (the relative lack of success of which has been almost entirely due to the quality of the product rather than marketing

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<sup>108</sup> DSA: Agence Aujourdhui, 'Post-test de la campagne télévisée "Jumbo cube"' (March 1987).

<sup>109</sup> DSA: memo, M.Cheriaux, untitled (October 1985): internal report, Agence Aujourdhui, 'Argumentaire: Jumbo Poisson' (1985); Interview: Yoboue; Personal experience: discussions with traders (1985).

<sup>110</sup> DSA: credit client sheets (1985-86): minutes, J.Perea, meeting between DANAFCO and GB (May 22 1985); Personal experience: observation.

strategy), some telling insights can be learnt into the way in which products become accepted by traders. Maggi Super was launched in stages and by market rather than at all levels of trade across the country. NOVALIM started by tastings and by placing the product on tables in selected, wealthier markets where they had the best contacts with traders. Only when the cube was established at this level did they set up semi-wholesalers before moving onto other markets, and only when the semi-wholesalers were established did they sell at the wholesale level. This avoided the pessimism factor for a cube which, despite being of rather poor quality, nonetheless gained the reputation of being a product that sold.<sup>111</sup>

Regarding publicity, NOVALIM started adverts before the product was readily available throughout the country. This created a consumer demand that was not initially satisfied, the consequence of which was that traders and consumers had the impression that the product was selling so well that supply could not keep up with demand. Admittedly, there were also negative consequences for the market became unstable and wholesalers, over optimistic about sales potential, overstocked. Further, when NOVALIM raised the price to the level of that of Jumbo, sales dropped off because of the poor quality of the cube. Nonetheless, Maggi Super settled down to a market share of around 15% whilst Jumbo Fish never surpassed 1%.<sup>112</sup>

The fifth factor in Jumbo's decline, and its Achilles' heel even in 1983-84, was DANAFCO's failure to stimulate distribution channels in most rural and some urban areas. The one area in which the retail store was vital to cube distribution was in villages. Jumbo suffered considerably from failing to achieve adequate coverage in this type of store and this accounts for a

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<sup>111</sup> DSA: internal report, J. Ayirebi, 'Market Survey on Jumbo Cubes and Competitive Brands in the Interior of the Ivory Coast' (May-July 1983); internal report, Agence Aujourd'hui, 'Sondage': memo, D. Aliaga, GB representative, to DANAFCO (October 2 1981); Personal experience: observation and discussions with salesmen (1983-85).

<sup>112</sup> DSA: minutes, meeting between DANAFCO and GB (July 13 1983); internal report, Agence Aujourd'hui, 'Jumbo: relevé des achats' (1985); sales ledger (1985-88); Personal experience: discussions with salesmen (1983-85).

great deal of the cube's weakness in rural districts. Most large villages with three to five stores were shown by many surveys to be without stocks of Jumbo to distribute to women traders for the periodic markets. This lack of a permanent presence at store level meant that market traders either had to rely on supplies from the *colporteurs* or journey into the nearest town to purchase stock. Not surprisingly, with the Maggi cubes readily available at all times and with greater margins, traders were reluctant to go to such efforts to obtain a similar product.<sup>113</sup>

There certainly existed some weaknesses in Jumbo's distribution at the wholesale level. Selling wholesalers' stock to retailers could have strengthened distribution in rural areas. The poor links in the Jumbo distribution chain in some regions is well illustrated by the fact that some semi-wholesalers found it easier to obtain stocks from Abidjan rather than the nearest town because in some of these towns a wholesaler either did not exist or only stocked the product irregularly because of the lack of a regular clientele. However, such anomalies were also partly a function of semi-wholesalers preferring to buy stock from a close relative in Abidjan rather than a comparative stranger in the nearest town.<sup>114</sup>

The sixth factor was the failure to purchase the PREPAL plant in Bouake when it folded in 1985. PREPAL, like Nestlé, had an ECOWAS tax concession which lessened manufacturing costs.<sup>115</sup> SAFA first proposed a joint purchase with GB in June 1985<sup>116</sup> and again sometime in 1987 with the Senegal and Mali agents but GB refused for reasons never made clear.<sup>117</sup> Purchasing PREPAL would have allowed Jumbo to be more competitive on trader

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<sup>113</sup> DSA: Ayirebi, 'Competitive Brands': internal report, Amavi, 'Définition/orientation'.

<sup>114</sup> Ibid.

<sup>115</sup> DSA: telex, E.Bosteen to Mr Puig (GB) (June 10 1985). The Taxe Commerciale Reduit (TCR) may be granted by the ECOWAS Ouagadougou commission to manufacturing companies which import a certain percentage of raw materials from member states.

<sup>116</sup> DSA: telex, E.Bosteen to Puig.

<sup>117</sup> DSA: letter, COSEPRAL (Dakar), SIPAL (Bamako) and DANAFCO (Abidjan) to Jaime Thomas, Président du Conseil d'Administration, PASA / GB, Barcelona (November 6 1987), p.6.

margins and would have given DANAFCO and GB greater profits which would have allowed an increased publicity budget.

The final factor in Jumbo's decline was a deterioration in the relationship between the trade mark owner, GB, and the local manufacturer/ distributor, SAFA/DANAFCO. Simply put, GB felt that DANAFCO was failing to put enough effort and expenditure into marketing Jumbo whilst DANAFCO became increasingly frustrated by GB's broken promises and their ignorance of local conditions.<sup>118</sup> From the available correspondence, which does not include internal GB memoranda, it would appear that GB was more guilty than DANAFCO. The Spanish company allegedly had a long record of concealing its activities outside of Ivory Coast from its agent despite SAFA's export role to neighbouring countries.<sup>119</sup> By 1987, DANAFCO/SAFA and the GB agents in Mali and Senegal were concerned enough about the destabilising effects of contraband goods and over-priced raw materials to detail their views in a joint letter to GB. For example, in 1987 GB was charging SAFA more for the raw materials to manufacture the cube than it was for the finished product.<sup>120</sup> Concerning DANAFCO's marketing efforts, few of the criticisms were fair in view of the analysis of Jumbo's failings, with three exceptions. These were the Fish cube debacle, the lack of control exercised over the cubes marketing manager in 1984 which led to his dismissal for embezzlement that same year<sup>121</sup> and, as noted above, the failure adequately to service rural areas.

In the face of NOVALIM's three pronged attack, responses by both PREPAL and DANAFCO/GB were inadequate. PREPAL did not have the resources to fight such a battle and went under in May 1985<sup>122</sup> whilst the Jumbo distributors DANAFCO were unable to

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<sup>118</sup> For example, DSA: letter, E.Bosteen to GB (March 16 1987): memo, M.Cheriaux to GB, 'Commentaires': memo, D.Aliaga (GB) to DANAFCO, 'Subject: Abidjan market' (October 2 1981): minutes, Perea, meeting between DANAFCO and GB.

<sup>119</sup> DSA: letter, E.Bosteen to GB (November 19 1980).

<sup>120</sup> DSA: letter, COSEPRAL et al.

<sup>121</sup> Personal experience. I was involved in uncovering the fraud. This individual was *not* Mourad.

<sup>122</sup> DSA: memo, untitled, (May 1985). The official closure date was 7-5-1985.

persuade their suppliers GB to match the Nestlé effort though the publicity budget was increased to a not insignificant 15% of turnover in 1983.<sup>123</sup> Not surprisingly, Jumbo sales fell in quantity by just over 20% between 1984 and 1987.<sup>124</sup> This still left Jumbo as the single largest selling cube. But with a change in distributors in May 1988 from DANAFCO to CICA<sup>125</sup> (at the time, Commerce et Industrie de la Cote d'Afrique, now Compagnie International de Commerce et d'Approvisionnement) because of policy disagreements the Jumbo brand lost further ground.<sup>126</sup> The reason for this is not hard to detect for, of the DANAFCO clients accepted as wholesalers by CICA, few were the loyal, local food traders which the former had built up in markets such as Odienne and Anyama.<sup>127</sup>

### 7.3 COMPARISON AND CONTRAST: CONCLUSIONS ON MILK AND CUBES

Whilst the cube and milk markets in 1990 appeared, at first glance, to be very different, they were remarkably similar in a number of important ways. Both markets showed clear, if different, patterns of imperfect competition. For cubes, the dominance and resources of a multinational corporation, Nestlé, meant that to launch a new product and develop a market would require large financial resources. This effectively meant that only a few large multinationals were likely to succeed. Jumbo showed that the rewards for success were considerable, given the size of the market, but that the costs of maintaining a strong presence could be prohibitive. For concentrated milk, government intervention with import restrictions put importers and consumers in a poor position. Competition was limited and any

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<sup>123</sup> DSA: minutes, meeting (13-7-1983).

<sup>124</sup> DSA: sales ledger 1984-87.

<sup>125</sup> Fieldwork: discussion with CICA Marketing Manager (November 16 1990).

<sup>126</sup> Interview: E.Bosteen (1st.); Attoh; DSA: letter, COSEPAL et al.

<sup>127</sup> DSA: 'Liste des clients DANAFCO acceptés par CICA pour distribution Jumbo cube' (n.d., circa 1988-89).

effort by importers to expand the market would likely benefit SIALIM more than the promoter.

A second similarity was the advantage of local manufacturing, though again the circumstances were very different. For concentrated milk, import restrictions guarantee the local manufacturer a large share of the market, an artificial situation. In fact, in a free market SIALIM's existence would be seriously jeopardised. For cubes, local manufacturing with TCR guaranteed high profits which, because of the extra amount which could be invested in promotion, could reinforce a brand's dominance. Hence Nestlé's advantage over Jumbo. A third similarity was that most of the inputs for the local manufacture of both cubes and milk had to be imported. The benefits of these enterprises, which were also capital intensive with few employees, are thus limited for the local economy.

Perhaps the most important similarity was that both products have created a dependence on foreign products. Further, Nestlé was not required to transfer any of its cube manufacturing technology. The change in consumer habits concerning flavouring of sauce has been at the expense of local produce and many instances of this have been observed in other countries. Milk became an addition to the diet rather than replacing anything (breastfeeding excepted), but it still involved expenditure on an imported product. However, there is some tentative evidence that Ivorian consumers reverted to cheaper, usually traditional, consumption patterns under conditions of economic hardship. But this is of small comfort given that such conditions are the opposite of what developing countries are trying to achieve.

The final major similarity was the important, at times dominant, role played by Non-Western Style Enterprises. Distribution from the wholesaler downwards was virtually monopolised by this sector: Western Style Enterprise wholesaling and retailing did not generate significant turnover. Indeed, formal sector participation in distribution decreased relatively over the years. The question then arises as to whether the informal sector's relationship with



the formal sector manufacturers and suppliers was benign or subordinate. Traders large and small alike undoubtedly benefitted financially from the cube and milk trades but there may be a question as to how dependent they are becoming on a large number of big selling products supplied by a few companies. In 1990, there were few outlets which did not stock Maggi cubes, Nescafé, Nescao, Nido, Cerelac, Arome Maggi and Nestlé concentrated milk. At the same time, many other big selling items at the store retail level were either supplied or manufactured by Blohorn. For milk, this increasingly included importers as well as wholesalers and retailers.

In summary, competition in the cube market was relentless, especially since the early 1980s, so much so that two brands prevented any others entering the market. For concentrated milk, the market was long dominated by one sweetened brand and one unsweetened brand. Competition was sporadic, and the introduction of import quotas in 1990 discouraged brand promotion expenditure even more. In their different ways, the cube and milk markets are examples of imperfect competition with both benefits and costs for the consumer. In both cases, local manufacturing played a key role as well as confirming the increasing dependence on these non-indigenous products which relied on foreign inputs and western technology.

## CHAPTER 8

### CONCLUSION

The period 1956 to 1990 in Ivory Coast was characterised by the government's pursuit of economic growth through the export economy. It was intended that export earnings and foreign investment would finance a degree of import substitution industrialisation. Until 1979-80, the economy grew rapidly and GDP rose almost every year. So too did GDP per head, despite a rapid population growth fuelled by heavy migration from poorer neighbouring countries. After 1980, the 'miracle' became a wide and deep recession which saw incomes fall, industries close and unemployment rise. Whilst the government was unashamedly pro-western and pro-capitalist in approach, private indigenous enterprise and, to a lesser extent, foreign interests, were subordinated to state-led capitalism.

For internal trade the thesis has sought to describe and explain the two themes highlighted by the title. On distribution techniques, store trading originated with the European trading posts and spread with the growth in Lebanese and later African-owned establishments. Non-Western Style Enterprise (NSE) stores had evolved into their contemporary form by the early 1960s: flexible trading practices, low overheads, simple physical structure, family employment, small capital and no formal accounts. Over time, these characteristics enabled NSE stores to become the dominant force in both wholesaling and retailing. At the same time, the non-store NSE sector remained a major source of distribution, as illustrated by the case study on the cube trade.

The history of Western Style Enterprise (WSE) until the early 1950s was one of near unchallenged supremacy. Possessing large financial resources, the biggest firms not only survived economic downturns but swallowed smaller, less secure, competitors along the way. Vertically integrated, they held the advantage through overseas contacts which virtually ensured a demand for exports and the regular supply of imports. Whilst WSEs attempted

continually to adapt to the changing trading environment after the early 1950s, the philosophy of these adaptations remained rooted in western trading theories. This dogged refusal to adopt at least some NSE characteristics led by 1984 to the disappearance of both state and private WSE retail chain operations. By 1991 most WSE wholesale interests, as well as many importers, had followed the retail chains into oblivion.

The second theme, foreign domination, took three different forms, all linked in one way or another. The domination of Lebanese and foreign Africans in NSE trading had its origins in the precolonial years from the sixteenth century onwards. A combination of a relatively small volume of market activity, the presence of organised Muslim traders (the mostly non-indigenous Dioula), the hostility of the coastline and the domineering behaviour of neighbouring empires all militated against the development of indigenous Ivorian entrepreneurs. In the colonial period indigenous traders were further hindered by the demands of the settler economy and measures aimed at discouraging Ivorian competition to European interests. From 1956 to 1980, the booming economy provided substantial economic options for Ivorians, especially in agriculture related activities. Many also gained stable, salaried employment with the state or foreign interests. At the same time, foreign migrants from poorer surrounding countries took the low paid agricultural labourer jobs or, failing even that, ended up in the unpredictable and unstable occupation of full-time trading, often aided by family or ethnic contacts. Thus most Ivorians had neither the need nor the contacts to succeed in trade. From 1980 to 1990, the need for alternative sources of income grew as the economy went into recession. However, Ivorians remained disadvantaged in contacts and, as the numbers of Lebanese and Mauritanian migrants continued to increase, competition in this tertiary sector greatly intensified.

A second form of foreign domination was European enterprises in the WSE and import/manufacturing sectors. This dated from the late nineteenth century but, as mentioned above, WSE store interests have all but disappeared. Thus this form of domination

existed more in theory than in practice, a point returned to later. Europeans dominated importing even longer than they did internal WSE distribution, but the 1980s saw increased competition from the Lebanese who operated with lower costs and sought out cheaper sources of supply. Manufacturing, led by Nestlé and Blohorn, remained predominantly in the hands of European firms with minor Ivorian share holdings; the only group likely to disturb this pattern was the Lebanese.

The third form of foreign domination was in the supply of processed food products to the Ivorian market. Whilst the balance increasingly shifted from importing to manufacturing, most local manufacturers were subsidiaries of foreign companies and/or used imported inputs. The cubes case study illustrated the large resources needed to capture enough of a product's market to make setting up local manufacturing viable in terms of economies of scale. Further, inputs for milk products, by far the largest product group even excluding the rapidly expanding yoghurt market,<sup>1</sup> were not available locally.

### 8.1 FOREIGN DOMINATION: SUPPLIERS, PRODUCTS AND CULTURE

In Third World countries, it is common for importers, manufacturers and brands of goods to be predominantly of foreign origin or ownership. However, in Ivory Coast 1956-90 this foreign dominance, especially amongst processed food importers, was extreme even by Third World standards.

The domination of foreign suppliers was virtually unchallenged by Ivorian interests since processed food imports first came into the country but foreign companies competed vigorously against each other. Whilst European firms held sway until the late 1970s, Lebanese businessmen, exploiting cheaper supply sources, seriously undermined this European dominance in the 1980s.

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<sup>1</sup> See F.Capelli, R.Inze and D.Toure, 'Yoplait: un marketing du leader. Interview de Monsieur Basseto, Responsable Commercial de la société Nandjelait-Yoplait', RIM, 3 (1989), p.21.

Given that processed foods were foreign, virtually all those sold in Ivory Coast were either imported or else manufactured by foreign companies locally, the most prominent example being Nestlé. The only exceptions were from the few companies with majority Ivorian share holding. Even local production of the few processed, packaged indigenous foods such as Foutou was done by foreign owned companies.

In view of the dominance in foreign origin of processed foods, taste transfer had serious implications for the trade balance. However, the inroads made by foreign foods were not as extensive as some writers have implied and indigenous food sources remain predominant. As Kobrin stated, the question is one of need satisfaction or want creation.<sup>2</sup> Cubes were one example of want creation and to an extent replaced some locally produced ingredients in the everyday diet. Concentrated milk, yoghurt and tinned tomatoes, all imported or requiring imported inputs, were other processed foods which achieved significant consumption levels but the former two did not displace local products so much as supplement them. Coffee was the other main processed food but, whilst processing was largely in the hands of foreign interests, the basic ingredient was local.

The demand-side influences on the spread of foreign consumption habits (and thus also, to a degree, on the power of foreign commercial and industrial concerns) are complex and need to be discussed in some detail. Three variables are considered in order of diminishing contributions to the growth of demand for processed foods: income per capita, product promotion and income distribution. The level of imports of processed foods, the most accurate proxy for consumption available, was closely related to income per capita. Imports per capita for most processed foods over the period 1956-60 to 1986-88 increased up to 1980 and stagnated or declined thereafter, as did income per capita. What

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<sup>2</sup> S.J.Kobrin, 'Multinational Corporations, Sociocultural Dependence and Industrialisation: Need Satisfaction or Want Creation?'. In P.K.Ghosh (ed), Multinational Corporations and Third World Development (Greenwood Press, Westport, 1984), pp.195-201.

evidence there is indicates that income per capita was the decisive factor in determining consumption levels.

By contrast, there is no evidence to support Anderson's assertion that developments in retailing would increase levels of consumption.<sup>3</sup> Improvements in retailing techniques or extensive promotional activity for a product appear to have had, at best, short-term effects on consumption patterns.<sup>4</sup> The one major exception was the stock cube, the consumption of which rose dramatically from the mid 1970s to the mid 1980s. But even for this convenience product, consumption per head eventually declined with income per capita. This was despite an unprecedented level of promotional activity, the net effect of which was to increase or decrease the market shares of competing brands rather than increase overall sales. Thus inappropriate patterns of demand, in which consumers spend money on items they do not need to the detriment of their diet, do not necessarily result from extensive marketing. However, there remains the fact that high income groups did consume many imported products which meant a draining of foreign exchange reserves.<sup>5</sup> To an extent criticisms of Third World governments for being lax in controlling luxury imports apply to Ivory Coast though import controls are not necessarily the most efficient response.

The growth of average incomes seems to have been the main source of increased consumption. However, the unequal distribution of income was probably the most important factor in limiting increases in processed food demand. Whilst income per capita rose rapidly during the boom years, the distribution of income was very inequitable which may well have been the prime factor in dealing a fatal blow to the hopes of achieving economic 'take off'. As Mytelka observed, "The slow growth of the domestic

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<sup>3</sup> E.Anderson, ' "Retail Pull": a Source of Economic Stability and Growth for Developing Nations', Journal of Retailing, 46, 4 (Winter 1970 - 71).

<sup>4</sup> Evidently more researched is needed in this area. Long-term increases through marketing or distribution initiatives are more difficult to detect for steady increases in consumption over an extended period could be due to rising or changing income and population patterns.

<sup>5</sup> T.J.Biersteker, Distortion or Development ? (Massachusetts Institute of Technology, Cambridge, Massachusetts, 1978), pp.16-17.

market that this implied threatened to undermine import-substituting industries".<sup>6</sup> For the large majority of Ivorians, the ability to purchase non-luxury processed foods of the type which economies of scale could justify local manufacturing was less than it would have been had incomes been more evenly distributed.

## 8.2 DISTRIBUTION TECHNIQUES: STRENGTHS, WEAKNESSES AND THE ENVIRONMENT

Currently available literature, the Ivorian state and their consultants have mostly emphasised the negative aspects of informal sector activities at the same time as ignoring weaknesses of western style distribution techniques. Of the two types of foreign domination in distribution, western interests started from a position of strength, having come from countries which were more technologically advanced and, in strictly economic terms, far better off. On the other hand, non-western foreign interests for the most part arrived from areas less well off and/or, in the case of the Lebanese and the Mauritians, from areas which were politically and economically unstable. Whereas western interests dominated the WSE sector, non-western interests prevailed in the NSE sector.

With the benefit of hindsight it can be seen that the WSE sector held only two significant advantages. These were more capital and the ability to keep proper accounts. Most of the literature covering enterprises and marketing in the Third World would add other advantages to this very short list: organisational skills, access to retail and advertising technologies and larger scale of operations leading to oligopolistic or even monopolistic markets. However, all of these commonly stated advantages either disappeared over time or were never actually advantages in the first place. The advantage of knowledge of overseas suppliers and of advertising technologies was only relevant to importers and manufacturers.

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<sup>6</sup> L.K.Mytelka, 'Foreign Business and Economic Development'. In I.W.Zartman and C Delgado, The Political Economy of Ivory Coast (Praeger, New York, 1984), p.153.

Access to retail technologies only proved significant in the supermarket sector. Monopolistic and/or oligopolistic dominance in retailing and wholesaling never even happened. The large scale of operation in the case of retail chains entailed inflexibility. The failure of the chains was despite Goldman's assertion that "such stores can achieve cost reductions and quality improvements through a chain form of organisation and through more modern operating methods".<sup>7</sup>

Even the two clear advantages held by the WSE sector became less significant over time. Capital was all important under the two-way system of trade that existed to the early 1950s but after then investments had to be redirected into other activities. The new reality was that however many Avion stores SCOA could afford to open, there was no guarantee that the consumer would use them. An additional, rarely mentioned, factor in this may well have been that "low income consumers in developing countries. . . shy away from unfamiliar [retailing] environments".<sup>8</sup> In short, the advantage of financial muscle was undermined by a failure to know how best to use it and by a host of advantages held by the NSE retailers. The advantage of proper accounting methods was also undermined. Whilst they enabled close monitoring of stock rotations, profitability and liquidity, these factors were outweighed by organisational inflexibility and excessive overheads. Thus, as Best noted in Botswana, "Traders claim that the co-ops have made no inroads into their established markets and offer no savings to the buyer."<sup>9</sup> Nor, at least as far as stores were concerned, was there any evidence to support for Ivory Coast the proposition which Kennedy put forward for Ghana that

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<sup>7</sup> A. Goldman, 'Outreach of Consumers and the Modernization of Urban Food Retailing in Developing Countries', Journal of Marketing, 38 (October 1974), p.14.

<sup>8</sup> Ibid., p.11; Personal experience: discussions with NSE small retail store customers (1983-86).

<sup>9</sup> A.C.G. Best, 'General Trading in Botswana, 1890-1968', Economic Geography, 46, 4 (1970), p.609.



"the dynamism of the modern sector" was an important factor in hindering the informal sector.<sup>10</sup>

WSE initiatives failed to grasp the importance of the environment not just in general terms (Ivory Coast as a whole) but also in specific terms (at the regional level), as illustrated by their uniform stocking policy. As Alexander remarked on retailing in industrial revolution England:

the kind of distribution service required is a function of the size and distribution of the population, the structure of production units and the level of individual and local self-sufficiency, the availability of transport and communication services, the size and distribution of income, and many other factors.<sup>11</sup>

Regional data on income and population for Ivory Coast indicate a diverse country. Rural areas and many small towns were more self-sufficient than Abidjan. Transporting goods to stores in villages or in northern urban areas was more expensive than supplying those near Abidjan. Income per capita in the south east in 1975 was nearly three times that of the south west, over five times that of the north and over six times that of the centre north. Climate, migrant settlements and religion further influenced consumption patterns. None of these factors were fully accounted for by the WSE retail chains in, for example, the range of products they stocked.

In sharp contrast to the WSE sector, the strengths of the NSE sector increased rather than diminished. Their advantages were an ability to adapt to rapidly changing circumstances, better knowledge of consumer trends, more appropriate location of stores, lower overheads, closer contacts with other traders, evasion or avoidance of most forms of taxation and, for the Lebanese, informal political contacts. In short, they operated according to their environment rather than, as in the case of the WSEs, according to theoretical assumptions based on experience in

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<sup>10</sup> P.Kennedy, 'Cultural Factors Affecting Entrepreneurship and Development in the Informal Economy in Ghana', IDS Bulletin, 8, 2 (1976), p.17.

<sup>11</sup> D.Alexander, Retailing in England During the Industrial Revolution (Athlone Press, University of London, 1970), p.3.

a different environment. Thus, as Bienefeld found in Tanzania, "this sector is relatively immune to competition from highly centralised, capital intensive operations, at least at present levels of consumption and mobility".<sup>12</sup>

Whilst kinship may impose burdens on traders, it also had advantages which served to lessen those of the WSEs. As Cohen found amongst the Hausa, ethnicity and religion played important parts in trade networks which were the source of financial assistance and market knowledge.<sup>13</sup> That there were "limitations and constraints that result from prevailing arrangements in social structure and culture", as Kennedy observed in Ghana,<sup>14</sup> was undoubtedly true for many Ivorians though less true for most foreign trading groups. Conversely, however, the success of the Mauritians and Lebanese clearly owed much to their tight social organisation. Indeed, Kennedy does note that, as far as entrepreneurial skills are concerned, "some kinds of social origins and some sorts of life experience are more likely to produce these skills".<sup>15</sup>

The NSE stores' awareness of consumer preferences was illustrated most clearly by the marked regional variations in types of products they stocked. Product range and reserve stocks were monitored daily according to consumer outreach and the ease with which depleted lines could be restocked at a nearby wholesaler.

Goldman's observation that Third World retailing systems evolve "mainly in response to certain behavioural patterns and only when these change can a more developed system appear"<sup>16</sup> perhaps explains why the number of stores increased whilst their basic functions and methods of operation remained essentially the same over the years. Developments in retailing alone, as

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<sup>12</sup> M.Bienefeld, 'The Informal Sector and Peripheral Capitalism: the Case of Tanzania', *IDS Bulletin*, 6, 3 (1974 / 75), p.65.

<sup>13</sup> A.Cohen, *Custom and Politics in Urban Africa* (Routledge and Kegan Paul, 1969), pp.7-20.

<sup>14</sup> Kennedy, 'Cultural Factors', p.17.

<sup>15</sup> *Ibid.*, p.19.

<sup>16</sup> Goldman, 'Outreach', p.13.

envisaged by Anderson, and by the Ivorian state and their French consultants, were only a part of increasing consumption.

Finally, it remains to determine the validity of Mittendorf's three stage model illustrating the changing patterns of retailing during the course of economic development. At stage one, public markets and neighbourhood shops are of equal importance. At stage two supermarket chains gain from public markets with the importance of neighbourhood shops unchanged. At stage three, hypermarkets and the chains are dominant, neighbourhood shops in decline and public markets of little significance.<sup>17</sup> Ivory Coast, throughout the 35 year period under study, by and large remained in the first stage. Only briefly during the 1970s did more 'developed' patterns begin to emerge and these were in the form of retail chains (intended as neighbourhood shops) which are not mentioned by Mittendorf. Supermarkets gaining at the expense of public retail markets was never likely to happen for the two retail sectors served almost entirely different products to almost entirely different consumers. What probably did happen was that supermarkets and grocery stores gained at the expense of small retailers in certain locations but even this appears to have been minimal.

### 8.3 DISTRIBUTION TECHNIQUES AND THE FOREIGN DOMINATION OF IVORIANISATION

Ivorianisation in the commercial sector saw little if any progress during the years 1956 to 1990. Ivorians in trade have been hindered by a variety of factors since the precolonial era. The state effectively added more barriers to the emergence of a genuinely Ivorian commercial class, one that operated according to its environment rather than being based on non-African trading techniques. In fact, the state sought the advice of foreign

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<sup>17</sup> As explained in E.Kaynak and S.T.Cavusgil, 'The Evolution of Food Retailing Systems: Contrasting the Experience of Developed and Developing Countries', Journal of the Association of Marketing Studies, 10, 3 (Summer 1982) and E.Kaynak, Marketing and Development (Praeger, New York, 1986), pp.100-102.

consultants, implemented foreign distribution techniques through the Programme d'Action Commerciale (PAC), supported foreign distribution companies and, unofficially, the Lebanese, and did nothing to assist Ivorian traders already established in internal trade. The so-called promotion of indigenous interests thus had a distinctly foreign flavour and, as the following paragraphs show, was intended to favour an elite<sup>18</sup> strongly westernised in outlook.

Three factors affected established or would-be Ivorian traders in the NSE sector: the existence of the retail and multiple chains of foreign companies, the state's PAC initiative, and the presence of large numbers of non-Ivorian Africans and a large Lebanese community. Although foreign chain stores ultimately failed, they were in competition with NSE sector traders and thus a barrier to this sector's advancement. As Boone and Campbell observed, whilst most were non-Ivorians, Ivorians would also have been affected.<sup>19</sup> These companies employed or assisted Ivorians but they also encouraged them to adopt inappropriate trading techniques.

As with the distribution chains of the foreign companies, PAC, which existed from 1970 to 1980, provided another barrier to the development of the NSE sector. The reason why the state set up a chain which competed with western interests was that it was part of a political strategy of playing off one interest against another, thereby preventing any one group becoming a threat to elite interests, i.e. divide and rule. This 'attempt' at Ivorianisation favoured those of a certain educational standard, many of whom would have been relatives of members of the elite. Also, members of the elite, as *rentiers* and managers in state companies, benefitted financially.<sup>20</sup> This became particularly apparent when

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<sup>18</sup> For a definition of the Ivorian 'elite', see T.Bakary, 'Elite Transformation and Political Succession'. In Zartman and Delgado (eds.), Political Economy, pp.21-55.

<sup>19</sup> C.Boone, 'Commerce in Cote d'Ivoire: Ivorianisation without Ivorian Traders', JMAS, 31, 1 (1993), p.83; B.Campbell, 'The Social, Political and Economic Consequences of French Private Investment in the Ivory Coast' (University of Sussex Ph.D., Brighton, 1973), p.332.

<sup>20</sup> Boone, 'Commerce', p.91. Members of an elite benefiting from commercial activities through the public offices they held seems to be a

rampant corruption set in during the latter years of its existence. Further, the PAC retail chain was a vehicle for promoting foreign distribution techniques geared to selling products which were mostly either imported or manufactured locally by foreign companies. This confirms Campbell's observation that "the process of Ivorianisation remained particularly weak in the commercial sector during the 1970s",<sup>21</sup> and these foreign influences remained in evidence through the Programme National d'assistance aux Commerçants Ivoiriens (PNCI). Finally, the state allowed PAC to fold in 1980 for the simple reason that it became too expensive to maintain at a time when state resources were becoming increasingly stretched.

The large number of Lebanese and foreign Africans in Ivory Coast has obstructed Ivorians in trade since precolonial times. Akeredolu-Ale's observation that the Ijebu in Nigeria benefitted from cumulative advantages (trade links and being brought up in a business environment) and economic necessity (lack of alternative means of making a living)<sup>22</sup> also worked in favour of foreign traders in Ivory Coast. These continued to be important factors throughout the period 1956-90. Despite publicly attacking foreign Africans in trade, the state did nothing to discourage them which did not also affect Ivorian NSE traders. The presence of foreigners performing this vital economic function helped prevent the emergence of an Ivorian commercial class with interests which might compete with those of the elite. Boone argued that northerners, who were the most numerous Ivorian traders, were targeted by the regime in the 1960s as, along with the Bete, they were among Houphouët-Boigny's political rivals implicated in the 1963 coup attempt.<sup>23</sup> Foreigners had no political leverage and

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time honoured tradition. See, for example, R.J.Hopper, Trade and Industry in Classical Greece (Thames and Hudson, 1979), pp.113-117.

<sup>21</sup> B.Campbell, 'State and Capitalist Development in the Ivory Coast'. In P Lubeck (ed.), The African Bourgeoisie (Lynne Rienner, Colorado, 1987), p.292.

<sup>22</sup> E.O.Akeredolu-Ale, 'A Sociohistorical Study of the Development of Entrepreneurship among the Ijebu of Western Nigeria', ASR, 16, 3 (1973), pp.347-364.

<sup>23</sup> Boone, 'Commerce', p.76-77.

thus posed no such threat as was observed by Cruise O'Brien on the Lebanese in Senegal.<sup>24</sup>

The distributive trade in the 1970s was one area where the state's attempt at harnessing financial benefits for the elite met with little success. The politically powerless foreign Africans and Lebanese hindered the growth of an Ivorian commercial class. The Lebanese strength in internal trade financed their expansion into the previously French dominated import-export sector. In public, government policy on internal trade, as with other sectors of the economy, consistently sought to increase Ivorian participation. In practice, the state did nothing to nurture Ivorians already established in trade.

#### 8.4 THE WIDER IMPLICATIONS OF THE DEVELOPMENT OF THE PROCESSED FOOD TRADE IN IVORY COAST

The elite's protection of foreign interests in the economy in general has been much criticised by Campbell and others.<sup>25</sup> However, from the evidence above, radical critics have not been entirely correct in linking the local elite to a foreign metropole for, in reality, the elite cleverly played the Lebanese off against metropolitan interests<sup>26</sup> which, if too powerful, could limit the elite's political power: as they already did to an extent. This was further evident in the lessening of the reliance for cocoa sales on the French company Sucden in favour of other brokers (Phibro of the US and Moutafian of the UK).<sup>27</sup>

The lack of private Ivorian participation in virtually all areas of the economy did not, though, extend to the state to the extent that Campbell, Amin and Mytelka implied. The state was the largest

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<sup>24</sup> R.Cruise O'Brien, 'Lebanese Entrepreneurs in Senegal: Economic Integration and the Politics of Protection', *CEA*, 57, 57 (1975).

<sup>25</sup> See Campbell, 'Capitalist Development'.

<sup>26</sup> See also Boone, 'Commerce', pp.91-92.

<sup>27</sup> EIU, Cote d'Ivoire Country Report (various issues 1989 - 91).

shareholder in industry,<sup>28</sup> a reality which led Lubeck to consider that,

because Houphouet-Boigny dominates political life and manipulates his clients so skilfully, one must ask whether the Ivorian state resembles a Bonapartist state whereby a single personality empowered by his control over the extensive state apparatus dominates a civil society to such a degree that insufficient space remains for fledgling capitalist classes to expand into manufacturing.<sup>29</sup>

The failure of the 'fledgling capitalist classes to expand into manufacturing' may well be at least in part due to the fact that many such capitalists would be expected to emerge from the commercial sector first and Ivorian private participation here was very limited. However, despite the substantial foreign presence, it was state interests which were of paramount importance to the lack of development of Ivorian private enterprise. No clearer indicator of this can be found than Houphouet-Boigny's statements that "What the Ivory Coast will not know and must not know, in its own interest, is Ivorian capitalism" and "The only capitalism that we must construct is that of the Ivorian state."<sup>30</sup> The fingerprints of this ideology were evident throughout the economy, including developments in both trading enterprises and processed food supply. Thus, Faure and Medard's liberal interpretation that foreign capital did not necessarily take precedence over Ivorian interests<sup>31</sup> is correct but only with regard to state interests. It is important to note this when considering the place of the Ivorian development strategy in the comparative history of the emergence of African capitalism.<sup>32</sup>

Looking at retailing across a wider range of developing countries, many of the factors already mentioned are relevant to other low

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<sup>28</sup> P.Lubeck, 'The African Bourgeoisie: Debates, Methods and Units of Analysis'. In Lubeck (ed.) African Bourgeoisie, p.22.

<sup>29</sup> Ibid., p.23.

<sup>30</sup> Quoted in J.Iliffe, The Emergence of African Capitalism (University of Minnesota Press, Minneapolis, 1983), p.80.

<sup>31</sup> J-A.Faure and J-F.Medard, 'Classe dominante ou classe dirigeante ?'. In J-A. Faure and J-F.Medard (eds), Etat et bourgeoisie en Cote d'Ivoire (Karthala, Paris, 1982), pp.139-140.

<sup>32</sup> See the articles in Lubeck (ed.), Bourgeoisie: Iliffe, Emergence.

income economies. Low consumer outreach, flexibility and overheads are not uniquely Ivorian problems but issues to be faced in any economy with limited transport networks, poor income distribution and highly competitive non-Western store types with low overheads. It is also time that more notice was taken of the strengths and importance of indigenous enterprises, their ability to meet rapidly changing demand and to operate with few resources whilst employing or supporting friends and relatives in countries with virtually no social security network.

Attempts to stimulate greater efficiency in any economic sector are of course highly desirable but the belief that a particular technology can function with the same efficiency in any environment is often misguided. Import substitution industries have provided many examples, the most recent in Ivory Coast being the attempt to save foreign exchange by manufacturing concentrated milk locally since 1990. In addition to the cost of importing the necessary capital goods, most of the raw materials also had to be imported and the end product costs more than the better quality imports.<sup>33</sup> In Nigeria, the Kano River Project initiated in 1971 is one of many examples of irrigation schemes consuming vast sums of development aid with few positive results.<sup>34</sup> Generally, capital-intensive and technically complex irrigation and other agricultural developments have caused as many problems as they have solved in developing countries.<sup>35</sup> Whilst technology can provide substantial benefits in many areas of an economy, development initiatives in the distribution sector as well as other areas of national economies have all too often failed to take sufficient account of local environments. The ability of NSE traders in Ivory Coast to survive in a hostile environment, in contrast to the failure of the WSE sector, must be the starting point of any future initiatives in developing internal distribution.

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<sup>33</sup> A.Diaby, 'Dossier industrie laitiere: un jumelage d'intérêt national', Fraternité Matin (November 6 1990), p.21; Fieldwork: discussions with traders and importers (July-December 1990).

<sup>34</sup> C.Barrow, Water Resources and Agricultural Development in the Tropics (Longman, Harlow, 1987), pp.310-311.

<sup>35</sup> P.Richards, Indigenous Agricultural Revolution (Hutchinson, 1985), pp.117-141.



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unknown, 'Entretien avec le Directeur Général et le Directeur Commercial de la Société CFCI ce matin à nos bureaux' (n.d., circa 1984).

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Telefax, DANAFCO to I.Trier (24 March 88).

## **5: INTERVIEWS**

Anthony, Mr. - French, Director of the Score group (Abidjan, November 1990).

Assouan, Claude - Ivorian, Directeur d'Achats at CDCI, (Abidjan, December 4 1990).

Attoh, Frederick - Ghanaian, DANAFCO General Manager (Abidjan, September 1990).

Bosteen, Erik - Danish, Chairman of West Africa Holdings, parent company of SAFA and DANAFCO (Abidjan, 1st. interview, November 15 1990).

Bosteen, Erik - Danish, Chairman of West Africa Holdings, parent company of SAFA and DANAFCO (Cahors, France, 2nd. interview, February 9 1992).

Boubakar, El Jilani Ould - Mauritanian wholesaler at Koumassi since 1970 (Abidjan, December 8 1990).

CNCI Director (Korhogo, November 20 1990).

Doh Gilles, Bernadin - Ivorian Baoule, Salesman at Blohorn and DANAFCO (Abidjan, 1st. interview, September 20 1990).

Doh Gilles, Bernadin - Ivorian Baoule, Salesman at Blohorn and DANAFCO (Abidjan, 2nd. interview, October 2 1990).

Drabo, Seydou - Burkinabe Mossi, Storekeeper and Nightwatchman at DANAFCO (Abidjan, July 24 1990).

Fakhry, Reda - Lebanese wholesaler (Lakota, November 24 1990).

Fofana, Coulibaly - Ivorian, Director of the Ecole de Commerce (Abidjan, December 4 1990).

Kloostra, Mr. - Dutch, Export Manager for Africa at C C Friesland Froco (Rotterdam, Telephone interview, May 3 1993).

Kobenan, Mr. - Ivorian, Director of SCIMPEX (Abidjan, December 10 1990).

Konan, Mr. - Ivorian, Manager of IVODIS gros store (Aboisso, November 8, 1990).

Kouakou, Nestor Kouassi - Ivorian Baoule, former Chaine Avion Manager (Abidjan, August 20 and 21 1990).

La Rue, Jacques - French, Chef de Mission PNCI (Abidjan, December 10 1990).

Merhouet, Mr. - Lebanese, Junior Partner of SABIMEX (Abidjan, November 13 1990).

Mohamed, Ould - Mauritanian retailer at Attiecoubé (Abidjan, interviewed by Mr. Raymond Guei, July 1990).

Mourad, Abdoul Karim - Ivorian-Saudi, freelance marketeer, Abidjan. Previously Marketing Manager at DANAFCO 1984-86, Wonder Batteries and Marlborough.

N'Gozan, Mr. - Ivorian, Manager at CDCI in zone 4 (Abidjan, December 12 1990).



Paoli, P. - French, Manager of the Champion Supermarket (Abidjan, November 1990).

Saïd, Mme. - Lebanese, Senior Secretary at CODIS (Abidjan, October 1990).

Yace, Mr. - Ivorian, SCOA Service d'Achats (Abidjan, December 15 1990).

Yoboue, Benoit - Ivorian Baoule, DANAFCO Salesman (Abidjan, July 16 1990).

Zamble, Henri - Ivorian Gouro, Chef du Personel at DANAFCO and independant candidate for deputy in the 1990 elections (Abidjan, December 1990).

## **6: FIELDWORK**

### **a) Surveys**

Brand range survey.

Product range survey.

Questionnaires (September-November 1990).

Regional distribution survey.

Unpublished survey by the PNCI (1989-90).

### **b) Discussions**

Most discussions with traders happened during the questionnaires survey when, for reasons of anonymity, names were not requested. The list below is therefore incomplete.

Adou Brou, Alexandre - Ivorian Agni, Salesman at DANAFCO, Abidjan.

Ahmadou, Dramera - Senegalese, Retailer, Lakota (November 23 1990).

Attoh, Frederick - Ghanaian, DANAFCO General Manager, Abidjan.

Ballo, Abdoulaye - Malian Malinke, Wholesaler, Grand Bassam.

Cheriaux, Marc - French, Ducros General Manager, Abidjan.  
Previously General Manger at DANAFCO 1974-89, Abidjan.

Chour, Abbas - Lebanese, Wholesaler, Abidjan Marcory.

Chour, Abdoul Karim - Lebanese, Wholesaler, Abidjan Koumassi.

Chour, Riad - Lebanese, Wholesaler, Grand Bassam.

Chour, Salah - Lebanese, Wholesaler, Abidjan Treichville.

CICA Marketing Manager, Abidjan (November 1990).

Commercial Attaché at the Bristish Embassy, Abidjan (Nov 1990).

Cunningham, Pasteur F.J. - British, Director of the Camp Alpin des  
Missions Protestantes, Man.

Doh Gilles, Bernadin - Ivorian Baoule, Salesman at DANAFCO,  
Abidjan. Previously at Blohorn.

Drabo, Seydou - Burkinabe Mossi, Storekeeper and Watchman at  
DANAFCO, Abidjan. Previously at Afrilait.

Esmail, Sultan Ali - Pakistani, General Manager of PROSUMA,  
Abidjan (October 1990).

French Consul, Korhogo (Nov 1990).

Ivoire Media official, Abidjan (Sept 1990).

IVODIS Manager, Korhogo (November 1990).

Jaber, Abdel - Lebanese, Cosmetics Retailer, Aboisso.

Khoury, Mikhail - Lebanese, Wholesaler, Divo.

MEFCO Manger, Abidjan (September 1990).

Merhoueh, Ali - Lebanese, Semi-Wholesaler, Abidjan Port Bouet  
(October 1990).

Ministry of Transport Official, Abidjan (August 1990).

Patentes office official, Abidjan (July 1990).

SACI Store Manager, Abidjan Plateau (1990).

Sehi, Prosper - Ivorian Senoufo, DANAFCO Storekeeper, Abidjan.  
Previously Storekeeper at SAFA and Union representative.

Sika, Jean Desire - Ivorian Attie, Perfume Salesman for  
Ets.SIBOCOR, Abidjan Plateau. Previously Salesman at DANAFCO  
1981-86, Abidjan.

Theze, Roselyn - French, Chargés des Supermarchés at DANAFCO,  
Abidjan. Previously at Abinader.

Tonga, Vincent - Ivorian Dan, Ducros Salesman, Abidjan.  
Previously Salesman at DANAFCO, Abidjan and a Storekeeper for  
Lebanese Wholesaler Elias Gabriel, Man.

Yedo, Benoit - Ivorian, SNEM Salesman. Previously Salesman at  
DANAFCO, and NOVALIM, Abidjan.

Yeo, Kamagate - Ivorian Senoufo, unemployed, Abobogare.  
Previously Storekeeper at DANAFCO, Abidjan.

Yoboue, Benoit - Ivorian Baoule, Salesman at DANAFCO, Abidjan.

Zabad, Hassan - Lebanese, Wholesaler, Dabou.

Zamble, Henri - Ivorian Gouro, Chef du Personnel at DANAFCO,  
Abidjan.

c) Various

Notes taken from Mme R.Theze who kept records of meetings  
during weekly sales visits to Abidjan supermarkets (1983).

PNCI, 'Produits de base pour magasins type 1 et 2'.

PROSUMA publicity leaflet (October 1990).

## 7: PERSONAL EXPERIENCE

Discussions or conversations were held with countless traders, salesmen and others involved either directly or indirectly in commercial activities during the periods 1983 to 1985 and 1986. Below is a list of the principal 'informants' during these years. The individual's name is followed by his/her nationality and/or ethnic origin and then their occupation and location at the time. This is followed by previous occupations, if relevant. Finally, occupation and location in 1990, if known, are given underneath the source in brackets but not all individuals were checked.

Aboa, Gerard - Ivorian, Directeur Administratif et Financier at SIREIME, Abidjan.  
(unknown)

Adji, Desire - Ivorian Bete, Commissaire de Police du 4<sup>ème</sup> arrondissement, Abidjan.  
(unknown)

Adnan, Ajami - Lebanese, Wholesaler, Lakota.  
(produce buyer)

Adou Brou, Alexandre - Ivorian Agni, Salesman at DANAFCO, Abidjan. Previously at SIFCODI.  
(unchanged)

Alimou, Barry - Guinean, Wholesaler, Abidjan Adjame.  
(bankrupt, unknown)

Amavi, Jean-Francis - Ivorian, Marketing Manager at DANAFCO 1981-84, Abidjan.  
(unknown)

Ankamah, Kwabena - Ghanaian, Director of Ets. Justice (import-export), Abidjan.  
(unknown)

Aouley, Mathurin - Ivorian Bete, Salesman at DANAFCO, Abidjan. Previously at Seward (Cosmetics and Soaps).  
(Salesman for SNEM)

Assoh, Kramoh - Ivorian Baoule, Chauffeur at DANAFCO, Abidjan. Previously worked for a Lebanese wholesaler.  
(retired, Dimbokro)

Attoh, Frederick - Ghanaian, Regional Manager at DANAFCO 1981-88, Bouake, General Manager at DANAFCO 1988-91, Abidjan.  
(1993: Manager at SOCOCE)

Aguer, Bruno J. - French, Assisant Manager, Citibank, Abidjan.  
(unknown)

Ayirebi, Joseph - Ghanaian, Market Researcher at DANAFCO 1983-84. Previously DANAFCO Manager in Ghana.  
(DANAFCO General Manager in Togo)

Baalbaki, Salim - Lebanese, Manager of Le Gourmet Alimentation, San Pedro.  
(unknown)

Bakaloga, Paul - Burkinabe Mossi, Wholesaler, Anyama.  
(unchanged)

Ballo, Abdoulaye - Malian Malinke, Wholesaler, Grand Bassam.  
(unchanged)

Bamba, Siaka - Ivorian, Manager at Ivoiro-Canadien Import-Export, Abidjan.  
(unknown)

Barry, Jean - Ivorian, Attaché de Direction at the Société Ivoirienne de Banque, Bouake.  
(unknown)

Bdeiri, Imad - Lebanese, Owner of Studio La Joconde, San Pedro.  
(unknown)

Bejjani, Antoine - Lebanese, Wholesaler, Divo.  
(returned to Lebanon in 1985)

Bosteen, Erik - Danish, DANAFCO Chairman.  
(unchanged)

Bosteen, Vivien - Danish, Accountant at DANAFCO 1981-83, Abidjan.  
(Ministry of Culture, Seychelles).

Boubakar, El Jilani Ould - Mauritanian, Wholesaler, Koumassi.  
(unchanged)

Boye, John - Ghanaian, Storekeeper at DANAFCO 1983-84, Abidjan.  
(unknown)

Chaoky, Sahly - Lebanese, Wholesaler, Agnibilekro.  
(assassinated in 1985)

Cheriaux, Chantal - French, Researcher at Agence Aujourd'hui,  
Abidjan.  
(unchanged)

Cheriaux, Marc - French, General Manger at DANAFCO 1974-89,  
Abidjan. Previously at Societé commerciale de diffusion (CODIF).  
(Ducros General Manager, Abidjan)

Chouman, Abbas - Lebanese, Wholesaler, Agnibilekro.  
(unchanged)

Chouman, Kamal - Lebanese, Wholesaler, Bondoukou and Bouna.  
(unchanged)

Chouman, Rafic - Lebanese, Wholesaler, Abidjan Abobogare.  
(unchanged)

Chour, Abbas - Lebanese, Wholesaler, Abidjan Marcory.  
(unchanged)

Chour, Abdoul Karim - Lebanese, Wholesaler, Abidjan Marcory.  
(Abidjan Koumassi)

Chour, Riad - Lebanese, Wholesaler, Abidjan Marcory.  
(Grand Bassam)

Chour, Salah - Lebanese, Wholesaler, Abidjan Treichville.  
(unchanged)

Chour, Salman - Lebanese, Wholesaler, Abidjan Koumassi.  
(Central African Republic)

Cunningham, Pasteur F.J. - British, Director of the Camp Alpin des  
Missions Protestantes, Man.  
(unchanged)

Dacoury Tabley, Celestine - Ivorian Dan, Wholesaler, Abidjan Port  
Bouet.  
(senior figure in the Front Populaire Ivoirien - FPI)

Dandy, Pascal - French, Supervisor at Supermarché Trade Center, Abidjan.  
(unknown)

Diabate, Tambagnaye - Ivorian Senoufo, Salesman at DANAFCO, Abidjan.  
(unknown)

Diarra, Samba - Burkinabe Mossi, Wholesaler, Abidjan Yopougon.  
(unknown)

Doh Gilles, Bernadin - Ivorian Baoule, Salesman at DANAFCO, Abidjan. Previously at Blohorn.  
(unchanged)

Doukoure, Aboubakar - Burkinabe Mossi, Wholesaler, Gagnoa.  
(bankrupt, still at Gagnoa)

Drabo, Seydou - Burkinabe Mossi, Storekeeper and Watchman at DANAFCO, Abidjan. Previously at Afrilait.  
(unchanged)

Ette, Jean - Ivorian Agni, Wholesaler, Aboisso.  
(bankrupt, reportedly jailed for smuggling)

Ezzedine, Hatif - Lebanese, Directeur Commercial at SHAFIPA, Abidjan.  
(unknown)

Fakhry, Reda - Lebanese, Wholesaler, Lakota. Previously a university lecturer in Beirut.  
(unchanged)

Fofana, Tidiane - Malian Malinke, Wholesaler, Abidjan Abobogare.  
(unchanged)

Gabriel, Elias - Lebanese, Wholesaler, Man.  
(unknown, last seen in Guinea in 1984)

Hankard, Andre - French, Director of the Agence Aujourd'hui, Abidjan.  
(unknown)

Hoballah, Youssef - Lebanese, Wholesaler, Danane.  
(unknown)

Iboudou, Ablasse - Burkinabe Mossi, Wholesaler, Abidjan Adjame.  
(unchanged)

Issany, N. - Chef de Rayon Vivres Frais at PROSUMA, Abidjan Plateau.  
(unknown)

Jaber, Abdel - Lebanese, Retailer, Abengourou.  
(perfume store, Aboisso)

Jomaa, Galeb - Lebanese, Wholesaler, Abidjan Treichville.  
(unknown)

Jouhair, Talal - Lebanese, Wholesaler, Bondoukou.  
(unchanged)

Kabbani, Bassam - Lebanese, Wholesaler, Abidjan Treichville.  
(Guinea)

Kabore, Adama - Guinean, Wholesaler, Abidjan Adjame.  
(unchanged)

Kamara, Kadialy - Malien Malinke, Wholesaler, San Pedro.  
(unknown)

Keita, Fanta - Dioula, Semi-Wholesaler, Abidjan Koumassi market.  
(unknown)

Khoury, Mikhail - Lebanese, Wholesaler, Divo.  
(unchanged)

Kingsberger, Peter - Swiss, Regional Manger at Wander, 1984-85.  
(unchanged)

Kouao, Assiedou - Ivorian, Responsable de la Comptabilité des Chèques Postaux at Ministère des Postes et Télécommunications, Abidjan.  
(unknown)

Kouakou, Kouassi - Ivorian Agni, Salesman at DANAFCO, Abidjan  
(unknown).

Kouakou, Therese - Ivorian Agni, Secretary at DANAFCO, Abidjan.  
(unemployed, Adjame)



Lia, Martin - Ivorian Bete, Chauffeur at DANAFCO, Abidjan.  
(unknown)

Malali, Bayo - Ghanaian, Wholesaler, Agnibilekro  
(unknown)

Melki, Georges M. - Lebanese, Grocery Store Manager, Abidjan.  
(unknown)

Meroueh, Ali - Lebanese, Wholesaler, Abidjan Port Bouet.  
(unchanged)

Meroueh, Assan - Lebanese, Wholesaler, Tiassale.  
(unchanged)

Meroueh, Hassan Ayoub - Lebanese, Director of Ivoirien de  
distribution et d'importation (IDIM), Abidjan Treichville.  
(unchanged)

Merhoueh, Mohamed - Lebanese, Wholesaler, N'Douci.  
(left Ivory Coast, now unknown)

Merhouet, Ali - Lebanese, Wholesaler, N'Douci.  
(unchanged)

Mingle, Charles - Ghanaian, General Manager of SAFA, Abidjan.  
Previously a lecturer in chemistry in Kumasi, Ghana.  
(Ducros, Togo)

Mobio, Akre Augustin - Ivorian, Chef d'Atelier at Africataires  
SNT.  
(unknown)

Modi, Mohamed Ould - Mauritanian, Wholesaler, Abidjan Adjame.  
(unknown)

Mourad, Abdoul Karim - Ivorian-Saudi, Jumbo Marketing Manager  
at DANAFCO 1984-86, Abidjan. Previously at Wonder (batteries).  
(freelance, Abidjan)

N'Diaye, Brigitte - French, Credit Controller at DANAFCO 1985-90,  
Abidjan.  
(Ducros, Abidjan).

N'Diaye, Y.Salif - Senegalese, Chef du Département Ventes Cargo at Air Afrique, Abidjan.  
(unchanged)

N'Guessan, Mangoua - Ivorian Baoule, Chauffeur at DANAFCO, Bouake.  
(now at Abidjan)

Ouattara, Sine - Ivorian Malinke, Senoir Accountant at DANAFCO, Abidjan.  
(Abinader, Abidjan)

Oulai, Rene - Ivorian Bete, Salesman at DANAFCO 1982-84, Abidjan.  
(unknown)

Perea, Julian - Spanish, Assistant Regional Manager at Gallina Blanca.  
(Europe)

Rek, Michel - Lebanese/French, Wholesaler, Duekoue.  
(unchanged)

Sawadogo, Poko - Burkinabe Mossi, Wholesaler, Abidjan Koumassi.  
(tailor)

Sehi, Prosper - Ivorian Senoufo, Storekeeper at SAFA and Union representative.  
(DANAFCO Storekeeper)

Sika, Jean Desire - Ivorian Attie, Salesman at DANAFCO 1981-86, Abidjan.  
(Perfume Salesman for Ets.SIBOCOR, Abidjan Plateau).

Souley, Seini - Hausa {Niger}, Wholesaler, Aboisso.  
(sometimes also at Abidjan Marcory).

Stratton, Chris - British, Regional Manager at Beechams.  
(unknown)

Sylla, Mariam - Malian Malinke, Wholesaler, Agboville.  
(unchanged)

Taleb, Mohamed Ould - Mauritanian, Wholesaler, San Pedro.  
(deceased 1989)

Tarraf, Sleyman (or Samy) - Lebanese, Retailer, Issia.  
(unchanged)

Tchi oi Tchi, Juliette - Ivorian Agni, Secretary at DANAFCO .  
(unknown)

Tchi oi Tchi, N'Da - Ivorian Agni, Salesman at DANAFCO, Bouake.  
(self employed, Bouake)

Theze, Roselyn - French, Chargés des Supermarchés at DANAFCO,  
Abidjan. Previously at Abinader.  
(unchanged)

Tonga, Vincent - Ivorian Dan, Salesman at DANAFCO, Abidjan.  
Previously a Storekeeper for Lebanese Wholesaler Elias Gabriel,  
Man.  
(Ducros Salesman, Abidjan)

Toure, Vagama - Ivorian Malinke, Wholesaler, Man.  
(unchanged)

Toxvaerd, Peter - Danish, Director of Marketing at DANAFCO 1984-  
87, Abidjan. Previously Danish Ambassador to Ivory Coast.  
(Copenhagen, Denmark)

Traore, Mammadou - Ivorian Malinke, Salesman at DANAFCO  
1983-85, Abidjan. Previously at NOVALIM and PREPAL.  
(deceased 1987)

Trier, Ian - British, Regional Manager at Quaker Special Markets  
Division.  
(Guinness, Park Royal NW10).

Vadel, Mohamed - Mauritanian, Wholesaler, Man.  
(Abidjan Adjame)

Winter, Simon - British, Service Clientele at Barclays Bank  
International, Abidjan.  
(unknown)

Yacouba, Oumarou - Hausa {Niger}, Wholesaler, Abidjan Adjame.  
(unchanged)

Yaw, Offori - Ghanaian, Semi-Wholesaler, Hire-Watta.  
(unknown)

Yedo, Benoit - Ivorian, Salesman at DANAFCO, Abidjan. Previously  
at NOVALIM.  
(SNEM Salesman)

Yeo, Kamagate - Ivorian Senoufo, Storekeeper at DANAFCO,  
Abidjan.  
(unemployed, Abobogare)

Yoboue, Benoit - Ivorian Baoule, Salesman at DANAFCO, Bouake.  
(Abidjan)

Zabad, Habib - Lebanese, Wholesaler, Dabou.  
(unchanged)

Zabad, Hassan - Lebanese, Wholesaler, Dabou.  
(unchanged)

Zakour, Michael J. - Lebanese, Wholesale Manager at John. M.  
Zakour & Sons , Accra.  
(unknown)

Zamble, Henri - Ivorian Gouro, Chef du Personnel at DANAFCO,  
Abidjan. Stood as an independent candidate for Deputy in the  
1990 elections.  
(unchanged)

## CORRIGENDA

- p.19, fn.4, 1.6 Bourgeoisie
- p.25, 1.2 later
- p.30, 1.4 change both 'establishments' to 'enterprises'
- p.47, 1.10 change 'stores' to 'traders'; 1.-9 determined
- p.51, 1.-10 subsistence
- p.54, 1.-2 stifling
- p.59, 1.6 delete 'As can be seen from the map'
- p.60, 1.3 significantly
- p.61, 1.12 kola
- p.72, 1.-4 set back
- p.75, 1.-7 delete 'of'
- p.76, 1.-3 administration
- p.77, 1.-2 crossroad
- p.89, 1.10 insert 'of'
- p.90, 1.-1 opportunities
- p.93, 1.4 insert 'of'; 1.-13 colonial
- p.95, 1.2 Enterprise
- p.96, 1.5 change 'final' to 'fifth'
- p.96, 1.8 add 'whilst the sixth looks at Ivorian NSE traders'
- p.97, 1.13 impossible; insert 'to'
- p.102, 1.9 discrepancy
- p.103, 1.-12 occurred
- p.112, 1.-5 hypocrisy
- p.119, 1.-4 purchasing
- p.121, fn.109, 1.6 beyond
- p.123, 1.12 consistent
- p.126, 1.5 occurred
- p.134, 1.2 interests
- p.137, 1.6 exchange; fn.187 patents
- p.139, 1.4 which; 1.9 racist
- p.140, 1.5 insert 'of'
- p.141, 1.-9 commercial
- p.142, 1.4 financial
- p.144, 1.15 acquired; 1.-1 acquire
- p.145, 1.-6 existence; 1.-3 determining
- p.149, 1.3 headquarters
- p.165, 1.6 unavoidable; 1.10 omit 2nd 'from'; fn.120 equivalent
- p.167, 1.-1 Economie
- p.174, 1.12 financial
- p.177, 1.-5 premises
- p.181, 1.14 premises
- p.182, 1.-15 registered
- p.186, 1.3 dominated
- p.190, 1.-1 subsidiary

p.191, 1.9 subsidiary  
p.192, 1.-4 found  
p.198, 1.7 change 'the' to 'these' ; delete '11'  
p.206, 1.-12 delete 'be'  
p.208, 1.4 subsidiaries  
p.210, 1.3 would  
p.211, 1.-18 existence ; 1.-17 occurred ; 1.-3 likelihood  
p.212, 1.10 derivatives ; 1.-6 sweeteners  
p.213, 1.9 entrepreneurs  
p.214, 1.-1 insert 'immigrant'  
p.224, 1.-5 acquire  
p.225, 1.-6 subsistence  
p.229, 1.1 crucially ; 1.-10 referred  
p.232, 1.-16 convenience  
p.234, 1.-4 conceivable  
p.235, 1.-3 convenience  
p.237, 1.-15 convenience  
p.238, 1.-14 attribute  
p.240, 1.-7 ingredients  
p.242, 1.1 advertisers  
p.243, 1.-5 tastings  
p.246, 1.12, 1.-9 & 1.-6 convenience  
p.248, 1.-11 concentrated ; 1.-8 examining  
p.249, 1.12 fourth  
p.257, 1.11 consistently  
p.258, 1.1 fraudulent  
p.260, 1.9 deterrents  
p.262, 1.13 & 1.15 ingredients  
p.265, 1.6 preceding  
p.279, 1.17 acquired ; fn.102 whose  
p.284, 1.-7 embezzlement  
p.286, 1.-3 generate  
p.287, 1.-8 competition  
p.292, fn.4 research  
p.304, Anyang ref. Bourgeoisie