

HZ UAS



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(Main text word count =6585)

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Executive Summary

Moringa Orchard, which will be referred to as MO in the text, is a modest company with a plantation in the far east of The Gambia. It exports limited quantities of moringa products to a few, localised outlets in Europe. Its current aim is to find out what it should do to adapt to the standards of a particular demanding type of European customer with a view to expanding sales in France, Germany, the Netherlands and the UK. It should be said that MO's charter goes beyond simple commercial aims: it aims also to participate in the development of the rural economy in the east of The Gambia where other horticultural projects are already underway.

The justification for the research is that MO needs to know:

1. ...What image can be derived from the company's offer and values to bring a coherent image to the European market.
2. ...In which way the company can generate value for customers willing to choose the sort of quality products it produces.
3. ...Which alleys are best suited for the distribution of the company's products.
4. ...How can the company create a network to promote and distribute its products.

Both literature and field research were conducted. It can be said that a largely empirical and data driven approach was privileged. Limited field work was, however, possible in France. To a certain extent the restrictions on travel during the period proved to be useful: they forced in depth research of existing widely dispersed literature sources which proved to be very valuable for detailed information.

Results indicate that MO is going in the right direction to export greater quantities to France, Germany, the Netherlands and the UK. However, MO's development involves a delicate balance which involves the standardisation and formalisation of its approach to meet often very strict European quality and hygiene norms without compromising the genuine simplicity of its current company style. The eventual pitfalls will be dealt with later. Here follows a condensed outline of recommended paths.

1. Put forward the qualitative approach it has regarding to production and the beneficial impact it has on the community.
2. Follow trends on the market relating to price, packaging, organic certification while still staying true to its vision and values.
3. Use intermediaries such as agents, industry groups and the privileged access to African diasporas to gain access to retailers and wholesalers in Europe.
4. Develop an online presence focussed on informing European customers of moringa's properties and provide a wide choice of references for the consumer to choose from.

These recommendations can be implemented within a time span varying from a month to multiple years. The timing depends on how quickly MO wishes to proceed but, also, on unknowns such as the Coronavirus pandemic which may slow product certification, for example.

Moringa Orchard, by implementing all or some of these recommendations, should increase its chances of export success and gain time.

1. Preliminary Research

1.1 Company Analysis

1.1.1 Moringa Orchard's Products and Services.

Moringa Orchard's activity is growing **moringa oleifera**, a tree with origins in Northern India imported centuries ago by traders to The Gambia where climate conditions proved to be ideal for its cultivation.

Moringa is often qualified as a "superfood" by marketers to denote its multiple properties even if the term has no regulatory or legal basis. (Moya, 2018)

The tree can be used in multiple ways. Examples:

- For food and drinks. The tree's fresh seed pods are used as a vegetable. Dried leaves or flowers are turned into a tea.
- Food supplements from powdered leaf have been proved to contain concentrated vitamins, antioxidants, minerals, proteins and fibre.
- Moringa seed oil, also known as Ben oil, is sought after for cosmetics.

The founder of Moringa Orchard, Mr Siamak Tagari, is also owner of a tea shop in Vlissingen, where so far most of his export production has been sold in the form of dried leaves for tea. The priority given to the sale of leaves is partly explained by the need to keep seeds to increase the number of trees on the plantation.

The leaves are already accredited for the European market and are therefore not subjected to European law and regulations of EU member states.

1.1.2 Moringa Orchard Locations.

There are three in two separate countries.

Under the name "Juice Bar" there are two outlets in The Netherlands in Vlissingen and in Goes. These establishments, jointly founded by Mr Siamak Tagari and Greetje Francke, specialise in sales of teas and juices. They have been operating since 2016 with the branch in Vlissingen opened after the success in Goes.

The third and obviously key site is the plantation in The Gambia on the banks of the Gambia River facing Miniang Island where the trees are steadily growing in number following a sustainable and traditional model of agriculture. Local people, partners in Moringa Orchard, tend the trees.

1.1.3 Company Philosophy and Vision

Mr Siamak Tagari clearly set out his vision for MO at an early meeting at HZ.

Having lived in Gambia for many years and often visiting since, he has become attached to The Gambia, its land and its people. This prolonged contact has made him a perfect witness to the changes the country has gone through since his first time there.

He sees a country that is being developed "backwards", or more geographically speaking eastwards. Mass tourism on the Atlantic coast is the main engine for the economy, while along the river, The Gambia's fluvial backbone, growth is scattered and sporadic.

There is a wide divide between the very built up and tourist orientated coastline and the rural interior.

Mr Tagari is convinced that there is more in The Gambia than tourism and beaches and that the country should be concentrating on the development upstream by focusing on the culture of the land with local people.

Hence, Moringa Orchard's aim to materialise this vision through the sustainable exploitation of moringa for export.

1.1.4 Company Goals

MO's primary goal is to streamline its export techniques and at the same time increase production capacity to establish itself in the European market.

Later, in the medium term, MO is looking at ways to diversify products after having clearly established export lines to Europe.

These commercial goals are paired with social goals. MO seeks to associate local people with the company's development, local people who already work at the plantation and who will continue to play a significant role in future activities.

1.1.5 Target Market

As already indicated, Mr Tagari's aim is to export his products to the European market and more specifically to France, Germany, the Netherlands and the United Kingdom.

Studies have been conducted in 2017 regarding the demand for moringa based products in Europe and results have pointed towards a demand of a few hundred tons with the four aforementioned countries as main markets.

The Continent already imports between 100 and 200 tons a year from India. A moringa importer in the Netherlands has conducted a study on the topic and has found out that most of the moringa coming into the Continent comes from India and that the German market constitutes more than a third of demand (35%), then comes the UK with 14% and then France and Austria at around 8-9%. (Affairs, 2019)

However, some concerns have been raised by certain importers regarding the quality of the products received from India and they are looking for new places where they can get supplies. A particular interest is given to fair trade and organic solutions.

There are good perspectives for the markets in which Mr Siamak desires to engage as they are anticipated to grow significantly until at least 2022.

1.1.6 Industry

1.1.6.1 Competition

The industry is dominated by India and Indian companies account for 80% of the global demand with a focus on mass production and low prices which make it difficult for smaller companies to find a place in the market without Unique Selling Point (USP) marketing approach based on high quality and organic certification.

Some other countries have started to export their moringa in the past few years such as South Africa, Ghana, Kenya or Zambia (Kerver, 2018).

1.1.6.2 Substitutes

The advantage of moringa is that it covers a wide range of vitamins and other value adding substances which are at the core of its appeal.

On the other hand, it faces competition from a slew of substitutes which maybe more easily recognised by the target consumer such as Ginseng, Mulberries, Ginger or Wheat grass.

1.1.7 Company Structure

The structure is not clearly established as the project is still very much in its infancy but some actors are already present.

The first, who is mentioned multiple times in this report, is Mr Siamak Tagari, is the man at the origin of the whole initiative and had the vision for the project. He is based in the Netherlands but often travels to The Gambia to help with certain decisions and keep track of the evolution of the plantation.

1.2 Problem Analysis

In the past few years multiple trends have emerged among Europeans who are now more conscious of the environment, their health and topics such as nutrition formerly considered as mundane. One of these trends is the apparition of so-called *superfoods* which are supposed to concentrate high nutritional value and health benefits. Aside from these concerns, it seems that superfoods also play a certain role in the trends related to vegetarianism and veganism which are becoming more and more popular. (Affairs, 2019) (Ecovia/CBI, 2020) These trends often need support from supplements in order for the human body to receive sustenance for all its needs which presents an opportunity for Moringa Orchard.

It is in this market that MO wants to operate and develop its activities. However, most of the market, while growing, is already being serviced by large companies from India which are competitive due to low pricing and large deliveries. Getting a foothold on the Continent is likely to prove to be difficult if information is lacking.

The challenge for the company is to manage to find a niche in which it can make its USP more apparent so that it can cater to a consumer base that is more sensible to arguments such as fair trade, organic production and cooperation with small producers. In certain markets, it is possible that the origin would be able to constitute a selling point.

1.3 Project Aim

The main aim of the project is to find a way to introduce the products of the company to the European market (Mainly France, Germany, the Netherlands and the UK) and make its USPs known to distributors and shop owners that will be willing to buy them. This means establishing a presence on the market that is coherent with the values and vision of the founder and representative of practices during the production of the moringa. The way to achieve such a goal would be by assessing how many of the needs and wants of the consumers and distributors are met by the company.

By undertaking the creation of a network of customers within the four selected countries and putting into place a coherent marketable image, it should be possible for the company to develop a solid base that could serve as a platform for expanding its activities, market share and, in the end, help with the concretisation of the future plans that Mr Siamak has for the plantation.

1.4 Information Gaps

In order to understand the ways the company needs to promote itself and to whom, the graduate will have to fill the following information gaps in order to propose a coherent strategy for the company.

- What image can be derived from the company's offer and values to bring a coherent image to the European market?
- In which way can the company generate value for customers who would be willing to choose the sort of quality product it produces?
- Which alleys are best suited for the distribution of the company's products?
- How can the company create a network to promote and distribute its products?

2. Research Approach

2.1 Approach per Information Gap

The research is oriented towards a quantitative approach defined as the “empirical research of observable phenomena via statistical, mathematical and computational techniques” (Given, 2008). This allows for the data collection of a multitude of data points concerning products and producers already present on the market in order to distinguish the present trends and norms of the market into which MO is entering. While not without its limits, this approach provided a mostly unbiased view of the situation using methods which can be replicated and controlled by anyone having access to the raw data and sources.

This logic was complemented by a literature research which aims to recuperate already existing research and studies on relevant topics pertaining to the moringa plant, its export and the legal context of the products derived from it and put this information to use for MO.

The four information gaps that were laid out at the beginning of the research can all be answered through the marketing logic of the 4Ps: Product, Price, Place and Promotion.

2.1.1 Promotion

In order to assess what image is well considered by consumers in the European market(1) -- and more importantly the markets in France, Germany, the Netherlands and the United Kingdom -- it was important to conduct research on the habits that companies already on the market have adopted in order to promote themselves and send out the image they desire.

2.1.2 Price and Product

To assess what characteristics are valued by consumers (2), the products which are present on the market had to be listed, categorised and analysed in order to isolate their qualities which might be mirrored in the future by MO's product line-up.

2.1.3 Place

In the meanwhile, as other forms of information have been collected, monitoring where and how they were collected helped determine how already established companies come into contact with their clientele (3 and 4). Physically or digitally? Through their own means or thanks to others?

2.2 Data Collection

In order for empirical research to be effective and be able to detect relevant trends on a macro scale, it was essential for the products and companies that were analysed to be of a sufficient number. This permitted the researcher to avoid inconsistencies in the results which could have been caused by a unique company or group of company without representing the truth of the market place.

Moringa, as described earlier in the preliminary research, is a very versatile raw product which can be transformed into a wide array of products -- not all similar in nature and therefore not easily comparable. This is why the researcher, when constituting the data base of products which has served as the “population” to this study, has divided the moringa products into the following categories which cover a combined 159 references (both products and bundles) and 48 brands (See Appendix 3):

- Moringa Powder.
- Moringa Tea.
- Moringa Oil.
- Moringa Pills (both tablets and capsules).

The defining criteria which were elected to define these categories were the number of brands which produce them and the number of product listings in each of these categories. It was decided that in order to provide a good enough view of a certain sub-market, a product category had to have the following traits:

- At least 20 product listings of this sort of product.
- At least eight different brands competing on the market.
- Consumers could find the product without the explicit mention of the brand name.

The information collected was put on a Google drive database which assembles the information gathered from both desk/market research and literature research. It also contains the notes for the few interviews which were conducted in the hope of guiding the research.

Most of the product data was collected through Google Search (multiple national versions) through the use of predetermined key words which have been listed. The list has been updated as the research progressed (See Appendix 1).

After the initial listing, a search would be conducted to retrace the product to the brands' websites which would then be analysed to help MO build its own in the future.

2.3 Data Analysis

Once the products and the place where they are available have been listed in documents regrouping them country by country, it was time to determine a few key aspects that MO needed to be aware of in order to pit its own products against the existing competition (see Appendix 2).

This fragmenting and unique format of the information allowed for an easier statistical use by the researcher and made it simpler to isolate the data relevant to each information gap. This is the point at which the product categories started to emerge and data sheets were put together to help in the empirical analysis of the information.

Literature research was oriented by the findings and would provide extra information regarding target population, labels, regulations and experiences of previous exporters of moringa and other herbal products towards the EU. The findings were summarised in online drive documents.

2.4 Operationalisation

The preliminary research helped the researcher to determine what important factors needed to be explored in order to fill, in a practical manner, the four information gaps at the centre of the project. These conclusions allowed for an operationalization table to be constructed in order to guide the research. It can be found in Appendix 11.

2.5 Reliability and Validity

2.5.1 Reliability

Whether it is for the product, market or shop analysis, the methods employed presenting the aforementioned characteristics allowed the researcher to benefit from the following forms of reliability in his work:

- Internal reliability (Salkind, 2010) as the sample of product references is big enough to withdraw items which do not comply with the norm and provide sufficient levels of comparison to determine if the products of a certain brand are to be taken into account fully or with reserve.

- Inter-rater reliability (Fink, 2010) as the method used hardly depends on the profile of person executing the research. It is based on the data, its analysis and processing. This will push toward an agreement between distinct and independent users of this method.
- Test-retest reliability (Hobbs, 2016) as the data is available publicly and can be recuperated and analysed or reanalysed by anyone wishing to do so. So long as no major shifts occur in the market which would push actors to change strategies or products, the same results will be achieved through the method of collection and analysis.

The literature research used to support the desk research is based on studies, often commissioned by official organisms, which are recognised and peer reviewed which allows for little doubt to be cast over them.

2.5.2 Validity

To validate how “this research measures what it set out to” (AQR, 2020), the relevant information was broken down in small units thanks to the operationalisation table in Appendix 12. These units can then be analysed individually or with little effort by people familiar with moringa or its qualities.

Therefore, MO’s staff and workers can easily access and use the information.

2.6 Limitations

It is important to mention that this study has certain limitations that have affected the data gathering process and also others which might influence data reliability on the long-term while another can have a certain influence on the legibility of some of data.

Firstly, it is obvious that the crisis linked to covid-19 has impacted the lives of millions over the first half of 2020. The lock-down has diminished the ability of the researcher to gather in person and in the field certain information and pieces of data. This has not had a dramatic impact on the quality of the research as the locations -- outside of Paris and its surroundings -- which could not be scoured physically like initially planned, were however accessible on the Internet and only pushed the researcher to be even more thorough when gathering data online.

Secondly, the rate at which the moringa market is expected to grow might, in the medium to long term, push actors to shift their strategies- in regards to products, packages, price, bundles, labels, etc- in order to fit with a European market which will be more aware of the benefits of the moringa plant and might have different priorities and demands from producers than at the moment.

Thirdly and finally, some of this data has been collected on online shops and venues which are not using Euros as their currency. It is especially true for, but not limited to, shops targeting the United Kingdom. These data have been isolated in order to be recognisable (as signalled in the caption of Appendix 3) and can be modified to correspond to current exchange rates by researchers wishing to replicate the methods in the future.

3. Results

3.1 Product Analysis

3.1.1 Moringa Oil

(See Appendices A3.1 and A4.1)

3.1.1.1 Origins of the plant

(See A4.1.1)

70% of brands divulge the country from which their moringa comes from. Only 30% of references do not mention origin.

Of the references which provide the information, 88% source their moringa from India, 6% from Madagascar and 6% from Nigeria.

3.1.1.2 Product Characteristics

(See A4.1.2)

Package

The most common package under which moringa oil is sold is 100ml (50% of references) followed 50ml (27%) and 30ml (9%). Other quantities cover 14% of references.

The packages used for moringa oil are quite similar from one brand to the other. Most use a glass bottle with a label glued to it with no safety cap. At 50ml and 30ml, 20% of references have a pipette integrated to make the dosage easier. This sort of container is however no longer favoured when the volume of the product reaches one litre. At this point a metal container is preferred.

The practice of bundling products to create discounts is only employed by one of the brands presents in the sample (Berivita) and can therefore be considered a relatively uncommon practice for this segment of the market.

Price

The average price per litre of moringa oil over the reference collected is €192.81 (See detail per country in appendix) with very consistent prices for the same references over the different shops and platforms.

The price of the oil varies dramatically depending on the size of the package: from €359.71 per litre on average if purchased in a 30ml container against €142.12 for packages of 100ml.

Organic Labels

In this product category, none of the references obtained an organic label according to European standards.

3.1.1.3 Uses of Moringa Oil

As much as 80% of the references are marketed as skin care/body care oil underlining the medicinal properties of moringa's many vitamins. Only 20% of the oil references are marketed for food consumption. Two brands mention that there is no counter indication to the consumption of their oils.

3.1.2 Moringa Pills

(See Appendices A3.2 and A4.2)

3.1.2.1 Origin of the Plant

(See A4.2.1)

Only 53% of references indicate origin. Where indications do exist, they show that 61% come from India, 33% from Africa – including 11% from Kenya – and 6% from Spain.

3.1.2.2 Product Characteristics

(See A4.2.2)

Dosage

While the average dosage varies slightly between tablets (487.5mg) and capsules (473mg), the most common dose encountered is 500mg for both. The vast majority of references show dosages between 400 and 500mg (75% for tablets and 86% for capsules).

Package

Moringa pills are often sold in small packages: 35% of references are sold in containers of under 50g for 30 or 60 day regimens; 58% under 100g and 79% under 500g. Few references sell in packages containing of more than 500g up to 2kg (brand: Hanoju).

Packages vary wildly, with each brand seeking its own style. Some brands prefer a medical angle with a glass pills bottle while others, targeting consumers who might take the pills as a sport supplement, prefer plastic containers reminiscent of protein powder.

Price

The price range of tablets and capsules is different. Capsules prices range in average from €308 to €346 per kilogram while tablet prices range from €292.28 to €312.24 per kilogram (See details per country in appendix). The difference is most likely due to the more complex methods involved in the production of capsules.

The average variance between low and high prices of the product references collected is of 12.25% for capsules and 6.82% for tablets. Prices of references vary from one shop to the next in 41% of cases, which can be explained by promotions in certain shops. This is especially true in German shops (VP=14.45%) and the Netherlands (VP=5.17%) while it remains relatively limited in France and the UK.

The average price for references under 100g is €394.44 per kilogram while the price of references of 100g and more have an average price of €230.68. However, prices are not directly correlated to the weight of the package, with brands selling references of a similar quantity at very different prices.

NB: one brand, Moringa Park, which has prices per kilogram which are five to six times superior to the rest of the market, was excluded from the calculations. It would however be interesting to explore the reasons for this strategy in another research to assess whether MO could mimic it at some point.

Organic Labels

Using organic labels is common practice for producers of moringa pills, with 65% of references being organic. The practice is more common for French (83%) and German (75%) references while only about half of Dutch and UK references use organic labels.

3.1.3 Moringa Powder

(See Appendices A3.3 and A4.3)

3.1.3.1 *Origin of the Plant*

(See A4.3.1)

The percentage of brands revealing the place where their brands come from is 66%. The remainder is unknown. Of the known places of origin, India is dominant with 64% followed by African countries with 25% -- including South-Africa with 7% and Kenya with 1%.

3.1.3.2 *Product Characteristics*

(See A.4.3.2)

Package

The majority of the moringa powder is sold in packages of 500g and less. The most common packages weight being 100g (18% of references), 200g (18%), 250g (10%) and 500g (12%).

Price

The price of moringa powder depends on a multitude of factors. Firstly, bundles are a common occurrence (19.4% of references). This is especially true in France (25%) and the Netherlands (42%) but far less so in the UK (4.8%) and not at all in Germany. Products sold in bundles tend to cost up to 25% less per kg.

Moringa powder is sold at various prices from country to country. French consumers pay the most (€92.17 - €94.44 per kg), Germans slightly less (€86.84 - €94.76); while both Dutch (€70.29 - €76.64) and UK (€62.89 - €68.08) consumers are heavily favoured. The influence of the large Indian community implanted in England explains why overall prices are low -- see Appendix A7.

Organic Labels

This influence of the Indian community -- very present in England (Appendix A.7) -- also explains why labels have become a prerequisite to have a chance to enter a niche in the market. This is also true for France and Germany, but for other reasons, with each more than 75% of references being certified as organic.

In the Netherlands, only about half of references are certified as organic which suggests that there is a window to enter the market without it.

3.1.4 Moringa Tea

(See Appendices A3.4 and A4.4)

3.1.4.1 *Origin of the Plant*

(See A4.4.1)

Of the references found for moringa tea, only 39% confirmed the country of origin. Of these, Cambodia produces 29%, India 28% and the African countries 36% -- including 7% from Kenya. India's dominance in moringa market segments is accepted but confirmed in labelling in this category.

3.1.4.2 *Product Characteristics*

(See A4.4.2)

Package

There is a wide variety of package quantities for moringa tea because each package is composed of multiple tea bags of varying size. The biggest group of packages is under 50g (44% of references) followed by packages between 50 and 100g (28%). It is rare that references have packages over 100g and even rarer over 200g. However, in bundle, these weights are more frequently reached.

Price

The average price of moringa tea including moringa blended with other leaves is situated between €148.61 and €161.69 per kilogram. Pure moringa tea is priced higher from €148.61 to €161.69.

In France, customers pay an average of €226 per kilogram while in Germany they pay only €69 per kilogram. Low German demand explains this price difference.

In the Netherlands, the average high price is 37% more than the average low price with many different shops fixing prices and establishing bundles.

Organic Labels

In France, Germany, the Netherlands and the United Kingdom, labels validate the quality of moringa tea in 72% of references though, in the Netherlands, the figure is only 44%.

3.1.4.3 Tea ingredients

(See A4.4.3)

Data showed that many moringa tea references were in fact blends with the most common added ingredients being lemon grass, mate and honey bush. Blending was used in 65% of Dutch references, 50% of UK references and 40% of French ones.

3.2 Labels

Moringa brands often use labels which defend independently validated standards to confirm the quality and the organic nature of their products. Other labels attest that the growing process is not detrimental to nature or to local communities. It is important to note that labels are less used for tablets and capsules.

The most commonly used label is the European Organic Label, a legal requirement for using the denomination “organic” in the European Union. Other national labels, of varying types, also complement this label.

Country	Commonly Used Label(s)	Relevant Appendices
France	AB; CosmeBio; Nature Progrès	A8.1
Germany	Bio Siegel; Naturland; Bioland	A8.2
The Netherlands	Eko	A8.3
United Kingdom	Soil association; Vegan Society; Organic farmers and Growers	A8.4
All	European Organic Label; Ecocert	A8.5

The validation process can be drawn out, complicated and mobilise time and resources that not all companies have. Hence the need to choose labels carefully (Affairs, 2019).

3.3 Shop Analysis

Both digital and physical shops play a big role in moringa sales which explains the interest in both for the researcher.

3.3.1 Physical Shops

The study of physical shops was limited to the Paris region and its surroundings due to covid-19 travel restrictions mentioned in section 2.6. Some findings, however, can be successfully extrapolated to other countries. Two sorts of shops proved to be most likely to list and sell moringa products.

3.3.1.1 African Diaspora

The first were African drugstores situated in the heart of expatriate communities in the suburban town of Montreuil and the Goutte d'Or in Paris' 18th District. These shops do not need to tell to their clients what moringa is. These communities represent a market section of millions of potential customers (See Appendix A.5) which, with the right approach, could be relatively easy to penetrate.

The researcher concentrated on Sub Saharan communities from countries where moringa is often consumed. While there are some indications of more moringa growing in North-African countries (Lavoix, 2017), this progression remains minor.

Examples of concentrations of African diasporas:

- Paris, Marseille, Lilles and Lyon in France (A6.1)
- Berlin, Hamburg and Stuttgart in Germany, (A6.2)
- Amsterdam, Rotterdam and the Hague, (A6.3)
- London, Wolverhampton and Manchester (A6.2)

The data available from country to country varies. Historical events have shaped data collection. However, the researcher found precise data on Gambians and Senegalese in both Germany (27800 individuals) and the Netherlands (3651) -- see Appendices 5.2 and 5.3. One source indicated that the Gambian diaspora in Germany is mainly in Berlin and Stuttgart (ESI, 2020) -- see map of Appendix 6.2. If MO could profit from contacts with these communities, the opportunity cost is limited.

NB: A series of six interviews was conducted to gather extra information on the communities. However, the result turned out to be inconclusive and has therefore been excluded.

3.3.1.2 Organic Shops

Aside from independent organic shops, the dominant actor of the organic market in France is Naturalia. Naturalia already sells moringa based products -- Aduna and Iswari (Naturalia M. , 2020) -- and is particularly present in the Paris region (Appendix A9.2) and other main French cities (Naturalia, 2020).

The company already sells established brands, some of which are also sold internationally (Appendix A3.3). It is too early for MO to consider joining these brands though this can be considered in the future.

It should be noted that the usual way to get into contact with sellers such as Naturalia is generally through specialised agents and industry groups (CBI, 2020) which sometimes act as a charity or for profit as intermediaries for producers (Appendix 10). However, if MO makes sufficient progress, it may not need to use these channels as can be seen in 3.3.1.1.

3.3.2 Online Shops

Multiple practices and trends were observed when it comes to retailers and shops concerning the information they provide and promotional tools they use (Appendix 11).

The main efforts deployed by European web shops concentrate on information aimed to reassure consumers about what they are buying and what they are getting from it. Many European consumers

need to be made aware of the existence of moringa and its properties. And some will have difficulty believing that a single product can combine so many qualities.

Many brands provide detailed information about prices, partly of course, to distinguish their own products.

4. Conclusion

The European market represents, for Moringa Orchard created by Mr Siamak Tagari in the East of The Gambia, an exceptional opportunity to reach more consumers. In anticipation, MO is currently expanding its production with a view to selling more in France, Germany, the Netherlands and the United Kingdom – the four countries which already constitute the greatest share of European market.

MO cannot hope to challenge the Indian domination of the mass moringa market. Its tactic, is to find a niche where the social and environmental values it defends, using natural and traditional methods, will be recognised and rewarded by consumers.

However, a niche market is still competitive and subject to certain rules. These rules were examined by the research by treating four main product categories and identifying where moringa consumers could be found and the means to reach them with adequate promotion.

4.1 Product and Price

Moringa in Europe, is on sale in the form of oil, pills powder and tea. Prices varying very wildly depending on the product category, package size and the place where they are sold.

Organic labels are commonly used for most products but cannot always be used to justify higher prices for consumers. However, consumers are so used to them that they are, de facto, obligatory in most cases.

4.2 Place and Promotion

European consumers of moringa are in the majority members of African and South Asian diasporas. Sales to a wider public are currently limited to those who seek an exotic nutritional complement or herbal remedy.

MO wants to develop sales to both groups but with different appeals. Diasporas are often concentrated in large urban centres, creating a strong localised demand. Links to home countries remain strong which corresponds to MO's strategic position next to a trade hub between The Gambia and Senegal. For example, the community aims of MO in the east of The Gambia can constitute a sales argument to both countries' diasporas. The guarantee of quality is the main appeal for consumers seeking lifestyle or health benefits.

This tactic does not rule out more ordinary ways to gain access to the market such as agents and industry groups.

4.3 Summary and Limitations

To conclude, it can be said that Moringa Orchard has already begun to take the first steps to becoming a reliable exporter and supplier for European clients and that if it pays attention to market trends and dynamics while using the advantages it has at its disposition, it will be able to find the niche it needs in order to have a permanent foothold on the European market. It can already claim to have exceptional product but now needs to turn this quality into sales.

It is obvious that research visits to shops were very limited, but this limitation could be said to be a blessing in disguise as more time was devoted to data and the identification of sources which can be used by MO and other students in the future.

5. Recommendations

5.1 Product and Price: How Moringa Orchard Can Learn from Others.

MO should try to follow established market trends for package sizes, dosages and the use of organic labels. To do this, MO should:

For all products:

- Provide consumers with a choice of products in terms of price and quantity.

For oil:

- Include in its product range at least one product at 30, 50 or 100ml.
- Sell at close to €193 per litre, the most common price for the most common package size.
- Promote only, like most producers, for skin and body care.
- Not treat organic certification as priority for oil.

For pills:

- Clearly arbitrate between the ease of fabrication of tablets and the higher prices for which capsules can be sold.
- Adopt a dosage per pill of either 400g, 500g or in between those two values.
- Sell at a price between €292 and €312 per kilogram for tablets and €309 and €347 for capsules.
- Seek, as a priority, organic labels for France and Germany where they are particularly common.

For powder:

- Keep the weight of references to under 500g. To sell greater quantities, bundles can be used with the possibility of offering more competitive prices.
- Prices need to be closely tailored to the country concerned.
- Obtain organic labels which are vital to enter the French, German and UK market. For the Dutch market, it is not so vital but highly recommended.

For tea:

- Sell tea in both tea bags and loose leaves.
- Prioritize France as the prices are much higher than elsewhere.
- Follow the existing Dutch practice by offering bundles.

For organic labels:

- Choose with care the labels that are the most useful before attempting to obtain any.

5.2 Place and Promotion: How Moringa Orchard Can Use its Existing Advantages.

To find partners and clients, MO should:

- Not restrict itself to the ordinary alleys used by other exporters to supply organic shops, big retailers and wholesalers.
- Try to profit from its implantation in it's The Gambia community to open an easier and cheaper route towards European consumers of African origin.

As for promoting its image, MO should:

- Create an online presence that can serve as a promotional platform and later be the basis of a web shop.
- Focus on informing consumers of moringa's many properties and reassure them quality.
- Create bundles so consumers may choose what quantities they want to buy and in what price range. This approach does not exclude promotions or special offers.

5.3 Implementation.

It should be remembered that cultivating moringa in the tropics, in the Gambia, means a harvest every three months guarantees the capacity to increase production and the easy identification of batches.

This advantage leaves room for experimentation at a few months' notice when it comes to pricing and to packaging. As for organic labels, batch production means a decision can be taken quickly but this does not speed up validation which can take from six months to more than a year.

Industry groups and agents can be contacted relatively easily but there is no guarantee that they will reply promptly. Establishing first contacts through African diaspora communities can be tried on very short notice but it is impossible to state how long fruitful contacts might take.

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Appendices

A1. Key word search table

In English	For France	“Moringa products France”; “Moringa France”; “Moringa shop Paris/Lille/Lyon/Marseilles”; “Moringa shop France”; “Moringa shop online France”; “Moringa powder France”; “Moringa tea France”; “Moringa paste France”; “Moringa Oil France”; “Moringa Seeds France”; “Moringa Vinegar France”; “Moringa Chocolate France”
	For Germany	“Moringa products Germany”; “Moringa Germany”; “Moringa shop Berlin/Dortmund/Munich/Cologne/Hamburg”; “Moringa shop Germany”; “Moringa shop online Germany”; “Moringa powder Germany”; “Moringa tea Germany”; “Moringa paste Germany”; “Moringa Oil Germany”; “Moringa Seeds Germany”; “Moringa Vinegar Germany”; “Moringa Chocolate Germany”
	For the Netherlands	“Moringa products Netherlands”; “Moringa Netherlands”; “Moringa shop Amsterdam/Rotterdam/the Hague”; “Moringa shop Netherlands”; “Moringa shop online Netherlands”; “Moringa powder Netherlands”; “Moringa tea Netherlands”; “Moringa paste Netherlands”; “Moringa Oil Netherlands”; “Moringa Seeds Netherlands”; “Moringa Vinegar Netherlands”; “Moringa Chocolate Netherlands”
	For the UK	“Moringa products UK/England”; “Moringa UK/England”; “Moringa shop”; “Moringa shop UK/England”; “Moringa shop online UK/England”; “Moringa powder UK/England”; “Moringa tea UK/England”; “Moringa paste UK/England”; “Moringa Oil UK/England”; “Moringa Seeds UK/England”; “Moringa Vinegar UK/England”; “Moringa Chocolate UK/England”
In French	For France	«Produits Moringa France»; «Moringa France»; «Boutique Moringa Paris / Lille / Lyon / Marseille»; «Boutique Moringa France»; «Boutique Moringa en ligne France»; «Moringa poudre France»; «Thé Moringa France»; «Pâte nutritive de Moringa France»; «Huile de Moringa France»; «Moringa graines France»; «Vinaigre de Moringa France»; «Moringa Chocolat France»
In German	For Germany	"Moringa Produkte Deutschland"; "Moringa Deutschland"; "Moringa Shop Berlin / Dortmund / München / Köln / Hamburg"; "Moringa Shop Deutschland"; "Moringa online kaufen Deutschland"; "Moringa Pulver Deutschland"; "Moringa Tee Deutschland"; "Moringa Einfügen Deutschland"; "Moringa öl Germany"; "Moringa Samen Germany"; "Moringa Essig Deutschland"; "Moringa Chocolate Germany"
In Dutch	For the Netherlands	“Moringa producten Nederland”; “Moringa Nederland”; “Moringa winkel Amsterdam / Rotterdam / Den Haag”; “Moringa winkel Nederland”; “Moringa winkel online Nederland”; “Moringa poeder Nederland”; “Moringa thee Nederland”; “Moringa deeg Nederland”; “Moringa Olie Nederland”; “Moringa zaad Nederland”; “Moringa Azijn Nederland”; “Moringa Schokolade Nederland”

A2. Data Collection Table

Brand	<ul style="list-style-type: none"> The brand under which the product is sold.
Country of provenance	<ul style="list-style-type: none"> The country in from which the moringa plant was sourced, where it was cultivated and harvested.
Type of product	<ul style="list-style-type: none"> The sort of product it belongs to. Whether it is one of the main 4 categories or another kind such as seeds, nutritive paste... In the Database, the products are colour coded by category.
Package Quantity	<ul style="list-style-type: none"> Expressed in grams (g), milligrams (mg) or millilitres(ml) depending of the product. Also details if the product can be found in different quantities and promotional bundles.
Price per unit	<ul style="list-style-type: none"> Expressed in the currency used in the store. Mostly euros and GBP (in the UK), some brands have their websites exclusively in USD. Details the price range for each reference (quantity and bundle) of the previous section.
Price per Kg/L	<ul style="list-style-type: none"> Expressed in the currency used in the store. Mostly euros and GBP (in the UK), some brands have their websites exclusively in USD. Details the price per kilogram of each reference contained in the previous two sections.
Labels	<ul style="list-style-type: none"> Lists the labels that have been obtained by the brand for the product range. These labels can be National or European and concern different topics such as veganism or organic characteristics of the product.
Sources	<ul style="list-style-type: none"> Place where the products were found or are listed. Contains weblinks of the store in which the product was found and the brand's store link if applicable.

Example

Brand name	Kneipp
Origin	/
Type of product	Tea
Package Quantities	30g (15 servings of 2g) 6x30g
Price per unit	€2.93-4.99 €14.85-29.94
Price per Kg	€97.67-166.33 €82.50-166.33
Labels	European Organic Label
Sources	https://www.kneipp.com/us_en/home/

A3. Data Comparison Sheet

Explanatory Caption

	This quantity is a sum due to a bundle reference.	All
	This price, while expressed in euros, was originally in USD (€1=\$1.13)	All
	This price, while expressed in euros, was originally in GBP (£1=€1.12)	All
Brand	Brand of the product reference	All
Origin	Country of origin of the plant	All
PQ	Package Quantity (g/mg/ml)	All
PD	Pill Dosage	Pills
PN	Pills Number (in a certain package)	Pills
LPPU	Low Price Per Unit	All
HPPU	High Price per unit	All
VP	Variance in Price	All
LPPKg/L	Low Price per Kilogramme/Litre	All
HPPKg/L	High Price per Kilogramme/Litre	All
CoS	Country of Shop	All
OL	Organic labels (Y=Yes;N=No)	All
T/C	Tablets (T) or Capsules (C)	Pills
PM	Pure Moringa (Y=Yes;N=No)	Tea
Use	The oil is marketed as foodstuff (Food) or as a skin/ hair balm (Medicinal)	Oil

A3.1 Oil Comparison Sheet

Brand	Origin	PQ (ml)	LPPU (€)	HPPU (€)	VP (€)	LPPL	HPPL	CoS	OL (Y/N)	Use
Ankh Rah	Unknown	30	€10.39	€10.39	€0.00	€346.45	€349.45	UK	N	Food
Ankh Rah	Unknown	100	€20.79	€20.79	€0.00	€207.90	€207.90	UK	N	Food
Berivita	India	50	€10.95	€10.95	€0.00	€219.00	€219.00	Netherlands	N	Food
Berivita	India	100	€19.70	€19.70	€0.00	€197.00	€197.00	Netherlands	N	Medicinal
Berivita	India	150	€27.93	€27.93	€0.00	€186.20	€186.20	Netherlands	N	Medicinal
Berivita	India	250	€43.80	€43.80	€0.00	€175.20	€175.20	Netherlands	N	Medicinal
Berivita	India	100	€13.95	€13.95	€0.00	€139.50	€139.50	Netherlands	N	Medicinal
Berivita	India	200	€25.12	€25.12	€0.00	€125.60	€125.60	Netherlands	N	Medicinal
Berivita	India	300	€35.58	€35.58	€0.00	€118.60	€118.60	Netherlands	N	Medicinal
Berivita	India	500	€55.80	€55.80	€0.00	€111.60	€111.60	Netherlands	N	Medicinal
Berivita	India	1000	€79.95	€79.95	€0.00	€79.95	€79.95	Netherlands	N	Medicinal
Fushi	Nigeria	50	€17.92	€17.92	€0.00	€358.40	€358.40	UK	N	Medicinal
Hei Poa	Unknown	100	€9.90	€9.90	€0.00	€99.00	€99.00	France	N	Medicinal
KrauterHaus Sanct Bernhard	India	100	€14.50	€14.50	€0.00	€145.00	€145.00	Germany	N	Medicinal
KrauterHaus Sanct Bernhard	India	100	€12.50	€12.50	€0.00	€125.00	€125.00	Germany	N	Food

Life of a Tree	Unknown	30	€11.19	€11.19	€0.00	€372.96	€372.96	UK	N	Medicinal
Life of a Tree	Unknown	150	€33.59	€33.59	€0.00	€223.93	€223.93	UK	N	Medicinal
Mira	Madagascar	50	€11.80	€11.80	€0.00	€236.00	€236.00	France	N	Medicinal
Moringa's Finest	India	50	€9.90	€9.90	€0.00	€198.00	€198.00	Netherlands	N	Medicinal
Moringa's Finest	India	100	€18.95	€18.95	€0.00	€189.50	€189.50	Netherlands	N	Medicinal
Moringa's Finest	India	200	€37.50	€37.50	€0.00	€187.50	€187.50	Netherlands	N	Medicinal
Terra Elements	Unknown	100	€19.95	€19.95	€0.00	€199.50	€199.50	Germany	N	Medicinal

A3.2 Pills Comparison Sheet

Brand	Origin	PD (mg)	PN	PQ (g)	LPPU (€)	HPPU (€)	VP (€)	LPPKg	HPPKg	CoS	OL (Y/N)	T/C
Ankh Rah	Unknown	640	80	51.2	€24.07	€24.07	€0.00	€470.09	€470.09	UK	N	T
Biovea	Unknown	500	60	30	€11.05	€14.95	€3.90	€368.33	€498.33	Netherlands	N	T
Fit Vitalis	Unknown	450	120	54	€13.49	€19.99	€6.50	€249.81	€370.19	Netherlands	N	T
Fit Vitalis	Unknown	450	120	162	€53.97	€53.97	€0.00	€333.15	€333.15	Netherlands	N	C
Hanoju	India	500	250	125	€29.95	€29.95	€0.00	€239.60	€239.60	Netherlands	Y	C
Hanoju	India	500	500	250	€38.48	€44.95	€6.47	€153.92	€179.80	Netherlands	Y	C
Hanoju	India	500	1000	500	€79.95	€79.95	€0.00	€159.90	€159.90	Netherlands	Y	C
Hanoju	India	500	2000	1000	€144.95	€144.95	€0.00	€144.95	€144.95	Netherlands	Y	C
krauterhaus Sanct Bernhard	India	500	240	120	€13.50	€15.00	€1.50	€112.50	€125.00	Germany	N	C
Life of a Tree	Africa	500	40	20	€11.19	€11.19	€0.00	€559.44	€559.44	UK	Y	C
Mattisson	India	400	60	24	€11.66	€12.95	€1.29	€485.83	€539.58	Netherlands	Y	T
Me Moringa For Life	Kenya	360	125	45	€14.60	€14.60	€0.00	€324.48	€324.48	France	Y	T
Me Moringa For Life	Kenya	450	400	180	€57.52	€57.52	€0.00	€319.57	€319.57	France	Y	C
Moringa Farm	Unknown	400	120	48	€14.00	€18.80	€4.80	€291.67	€391.67	Germany	Y	C
Moringa Farm	Unknown	400	830	332	€72.50	€72.50	€0.00	€218.37	€218.37	Germany	Y	T
Moringa Farm	Unknown	500	120	60	€15.90	€19.90	€4.00	€265.00	€331.67	Germany	Y	C
Moringa Farm	Unknown	500	200	100	€27.90	€33.90	€6.00	€279.00	€339.00	Germany	Y	C
Moringa Park	Unknown	420	30	12.6	€39.90	€39.90	€0.00	€3,166.67	€3,166.67	Germany	N	C
Moringa Park	Unknown	420	100	42	€119.90	€119.90	€0.00	€2,854.76	€2,854.76	Germany	N	C
Moringa's Finest	India	500	100	50	€12.45	€12.45	€0.00	€249.00	€249.00	Netherlands	Y	T
Moringa's Finest	India	500	500	250	€49.80	€49.80	€0.00	€199.20	€199.20	Netherlands	Y	T
Moringa's Finest	India	500	100	50	€13.95	€13.95	€0.00	€279.00	€279.00	Netherlands	Y	T
Moringa's Finest	India	500	500	250	€49.75	€49.75	€0.00	€199.00	€199.00	Netherlands	Y	T

MRM Nutrition	Unknown	600	60	36	€12.91	€16.82	€3.91	€358.61	€467.22	Netherlands	N	C
Nat et Form	Unknown	285	200	57	€7.99	€7.99	€0.00	€140.18	€140.18	France	N	C
Natural Nutrition	Unknown	480	60	28.8	€11.46	€20.40	€8.94	€397.92	€708.33	France	Y	C
Nutrimea	India	400	120	48	€16.90	€17.90	€1.00	€352.08	€372.92	Netherlands	Y	T
Phytoceutic/herbatint	Spain	700	60	42	€13.59	€18.00	€4.41	€323.57	€428.57	France	Y	T
Terra Element	Unknown	500	240	120	€22.95	€23.99	€1.04	€191.25	€199.92	Germany	Y	C
Terra Element	Unknown	400	150	60	€22.95	€22.95	€0.00	€382.50	€382.50	Germany	Y	C
Vitall+	Unknown	500	60	30	€22.90	€22.90	€0.00	€763.33	€763.33	France	Y	C
Yamba	South-Africa	500	100	50	€14.72	€18.40	€3.68	€294.40	€368.00	Netherlands	N	C
Yamba	South-Africa	500	100	100	€33.12	€33.12	€0.00	€331.20	€331.20	Netherlands	N	C
Yamba	South-Africa	500	100	200	€58.88	€58.88	€0.00	€294.40	€294.40	Netherlands	N	C

A3.3 Powder Comparison Sheet

Brand	Origin	PQ (g)	LPPU (€)	HPPU (€)	VP (€)	LPPKg	HPPKg	CoS	OL (Y/N)
Aduna	Africa	100	€8.04	€11.90	€3.86	€80.40	€119.00	Multi	Y
Aduna	Africa	200	€13.99	€14.94	€0.95	€69.95	€74.70	Multi	Y
Aduna	Africa	275	€16.09	€16.09	€0.00	€58.51	€58.51	Multi	Y
Aduna	Africa	825	€42.55	€48.28	€5.73	€51.58	€58.52	Multi	N
Ankh Rah	Unknown	70	€16.31	€16.31	€0.00	€232.96	€232.96	UK	N
Ankh Rah	Unknown	150	€28.56	€31.99	€3.43	€190.40	€213.25	UK	N
Another Tree	Cambodia	70	€11.90	€11.90	€0.00	€170.00	€170.00	France	Y
Another Tree	Cambodia	210	€29.90	€29.90	€0.00	€142.38	€142.38	France	Y
Another Tree	Cambodia	630	€88.00	€88.00	€0.00	€139.68	€139.68	France	Y
Ausha	India	200	€9.75	€10.92	€1.17	€48.75	€54.60	UK	Y
Bare Organics	Unknown	227	€15.85	€25.20	€9.35	€69.82	€111.01	Netherlands	Y
Berivita	India	100	€10.95	€10.95	€0.00	€109.50	€109.50	Netherlands	N
Berivita	India	200	€19.70	€19.70	€0.00	€98.50	€98.50	Netherlands	N
Berivita	India	400	€37.24	€37.24	€0.00	€93.10	€93.10	Netherlands	N
Berivita	India	600	€52.56	€52.56	€0.00	€87.60	€87.60	Netherlands	N
Berivita	India	1000	€27.00	€27.00	€0.00	€27.00	€27.00	Netherlands	N
Biovea	Unknown	454	€22.80	€47.40	€24.60	€50.22	€104.41	Netherlands	N
Chia Direct	Unknown	250	€13.90	€13.90	€0.00	€55.60	€55.60	Netherlands	Y
Chia Direct	Unknown	500	€25.02	€25.02	€0.00	€50.04	€50.04	Netherlands	Y
Chia Direct	Unknown	500	€22.25	€23.60	€1.35	€44.50	€47.20	Netherlands	Y

Chia Direct	Unknown	750	€35.46	€35.46	€0.00	€47.28	€47.28	Netherlands	Y
Chia Direct	Unknown	1000	€41.06	€43.88	€2.82	€41.06	€43.88	Netherlands	Y
Chia Direct	Unknown	1500	€58.05	€58.05	€0.00	€38.70	€38.70	Netherlands	Y
Chia Direct	Unknown	2000	€59.99	€59.99	€0.00	€30.00	€30.00	Netherlands	Y
Coconut Merchant	Sri Lanka	70	€5.49	€6.15	€0.66	€78.43	€87.84	UK	N
Coconut Merchant	Sri Lanka	420	€29.65	€33.21	€3.56	€70.60	€79.07	UK	N
Ecoidées	India	200	€11.59	€11.59	€0.00	€57.95	€57.95	France	Y
Hanoju	India	250	€27.95	€27.95	€0.00	€111.80	€111.80	Multi	Y
Hanoju	India	500	€49.95	€49.95	€0.00	€99.90	€99.90	Multi	Y
Hanoju	India	1000	€89.95	€89.95	€0.00	€89.95	€89.95	Multi	Y
Hatton Hill Organic	India	50	€2.25	€2.52	€0.27	€45.00	€50.40	UK	Y
Hatton Hill Organic	India	100	€3.99	€4.47	€0.48	€39.90	€44.69	UK	Y
Hatton Hill Organic	India	200	€5.49	€6.15	€0.66	€27.45	€30.74	UK	Y
Hatton Hill Organic	India	500	€12.26	€14.55	€2.28	€24.53	€29.10	UK	Y
Hatton Hill Organic	India	1000	€22.39	€22.39	€0.00	€22.39	€22.39	UK	Y
Hatton Hill Organic	India	2000	€43.67	€43.67	€0.00	€21.83	€21.83	UK	Y
Hatton Hill Organic	India	3000	€61.59	€61.59	€0.00	€20.53	€20.53	UK	Y
Hatton Hill Organic	India	5000	€100.79	€100.79	€0.00	€20.16	€20.16	UK	Y
Hatton Hill Organic	India	10000	€197.11	€197.11	€0.00	€19.71	€19.71	UK	Y
Hatton Hill Organic	India	25000	€391.99	€391.99	€0.00	€15.68	€15.68	UK	Y
Iswari	Unknown	125	€9.55	€10.79	€1.24	€76.40	€86.32	France	Y
Krauterhaus Sanct Bernhard	India	500	€16.50	€19.00	€2.50	€33.00	€38.00	Germany	N
Le Diamant Vert	Unknown	200	€21.90	€21.90	€0.00	€109.50	€109.50	France	Y
Life of a Tree	Africa	100	€8.95	€8.95	€0.00	€89.49	€89.49	UK	Y
Life of a Tree	Africa	250	€13.43	€13.43	€0.00	€53.72	€53.72	UK	Y
Madia Bio	India	150	€8.95	€9.35	€0.40	€59.67	€62.33	France	Y
Mattison	India	125	€11.21	€15.37	€4.16	€89.68	€122.96	Netherlands	Y
Me Moringa For Life	Kenya	200	€24.34	€24.34	€0.00	€121.68	€121.68	Multi	Y
Minvita	Unknown	250	€11.19	€16.45	€5.26	€44.76	€65.81	UK	Y
Moringa Farm	Unknown	35	€6.80	€6.80	€0.00	€194.29	€194.29	Germany	Y

Moringa Farm	Unknown	175	€17.00	€25.90	€8.90	€97.14	€148.00	Germany	Y
Moringa Park	Unknown	100	€14.90	€14.90	€0.00	€149.00	€149.00	Germany	N
Moringa's Finest	India	125	€7.95	€7.95	€0.00	€63.60	€63.60	Netherlands	Y
Moringa's Finest	India	250	€12.95	€12.95	€0.00	€51.80	€51.80	Netherlands	Y
Na'vi	India	100	€11.14	€11.14	€0.00	€111.44	€111.44	UK	Y
Natureil	Africa	200	€5.90	€5.90	€0.00	€29.50	€29.50	Germany	Y
Purasana	Unknown	200	€10.95	€11.76	€0.81	€54.75	€58.80	Multi	Y
Raw Living	India	100	€5.54	€5.54	€0.00	€55.44	€55.44	UK	N
Seven Hills Whole Foods	India	500	€13.99	€13.99	€0.00	€27.98	€27.98	UK	Y
Superdiet	Unknown	150	€13.50	€13.50	€0.00	€90.00	€90.00	France	Y
Terra Elements	Unknown	100	€12.90	€12.90	€0.00	€129.00	€129.00	Germany	Y
Terra Elements	Unknown	500	€41.99	€41.99	€0.00	€83.98	€83.98	Germany	Y
Vitatrend	Unknown	200	€12.61	€12.61	€0.00	€63.05	€63.05	Germany	Y
Vivio	India	100	€11.49	€11.49	€0.00	€114.90	€114.90	Netherlands	N
Yamba	South-Africa	200	€14.72	€18.40	€3.68	€73.60	€92.00	Netherlands	N
Yamba	South-Africa	400	€31.50	€31.50	€0.00	€78.75	€78.75	Netherlands	N
Yamba	South-Africa	800	€56.00	€56.00	€0.00	€70.00	€70.00	Netherlands	N

A3.4 Tea Comparison Sheet

Brand	Origin	PQ (g)	LPPU (€)	HPPU (€)	VP (€)	LPPKg	HPPKg	CoS	OL(Y/N)	PM (Y/N)
Another Tree	Cambodia	336	€110.00	€110.00	€0.00	€327.38	€327.38	France	N	Y
Another Tree	Cambodia	112	€38.90	€38.90	€0.00	€347.32	€347.32	France	N	Y
Another Tree	Cambodia	224	€78.00	€78.00	€0.00	€348.21	€348.21	France	N	Y
Another Tree	Cambodia	28	€9.90	€9.90	€0.00	€353.57	€353.57	France	N	Y
Bare Organics	Unknown	60	€11.65	€15.75	€4.10	€194.17	€262.50	Netherlands	Y	N
Buddha Tea	India	120	€11.19	€11.19	€0.00	€93.24	€93.24	UK	Y	Y
Jacob Hooy	Unknown	55	€4.49	€9.00	€4.51	€81.64	€163.64	Netherlands	N	Y
Jacob Hooy	Unknown	220	€21.16	€21.16	€0.00	€96.18	€96.18	Netherlands	N	Y
Jacob Hooy	Unknown	165	€17.10	€17.10	€0.00	€103.64	€103.64	Netherlands	N	Y
Jacob Hooy	Unknown	110	€13.06	€13.06	€0.00	€118.73	€118.73	Netherlands	N	Y
Kneipp	Unknown	180	€14.85	€29.94	€15.09	€82.50	€166.33	Netherlands	Y	N

Kneipp	Unknown	30	€2.93	€4.99	€2.06	€97.67	€166.33	Netherlands	Y	N
Krauterhaus Sanct Bernhard	India	250	€12.50	€12.50	€0.00	€50.00	€50.00	Germany	N	Y
Le Diamant Vert	Unknown	50	€9.90	€9.90	€0.00	€198.00	€198.00	France	Y	Y
Life of a Tree	Africa	84	€11.99	€11.99	€0.00	€142.74	€142.74	UK	Y	Y
Life of a Tree	Africa	67	€11.19	€11.19	€0.00	€167.00	€167.00	UK	Y	Y
Life of a Tree	Africa	50	€8.95	€8.95	€0.00	€178.98	€178.98	UK	Y	Y
Lifetone	Unknown	30	€5.03	€5.03	€0.00	€167.63	€167.63	UK	Y	Y
Lifetone	Unknown	60	€10.07	€10.07	€0.00	€167.81	€167.81	UK	Y	Y
Lov	Unknown	100	€14.90	€14.90	€0.00	€149.00	€149.00	France	Y	N
Me Moringa For Life	Kenya	200	€26.46	€29.90	€3.44	€132.30	€149.50	France	Y	Y
Moringa's Finest	India	150	€10.95	€10.95	€0.00	€73.00	€73.00	Netherlands	Y	Y
Natur Boutique	India	30	€4.02	€4.98	€0.96	€134.03	€166.13	UK	Y	Y
Natureil	Africa	200	€7.69	€7.69	€0.00	€38.45	€38.45	Germany	Y	Y
Palais des Thés	Unknown	100	€15.00	€15.00	€0.00	€150.00	€150.00	France	Y	N
Palais des Thés	Unknown	100	€15.00	€15.00	€0.00	€150.00	€150.00	France	Y	N
Surihealth	Suriname	30	€2.95	€4.50	€1.55	€98.33	€150.00	Netherlands	N	N
Terra Elements	Unknown	100	€11.95	€11.95	€0.00	€119.50	€119.50	Germany	Y	Y
Tipson*	Unknown	37.5	€4.42	€6.19	€1.77	€117.76	€164.96	UK	Y	N
Tipson*	Unknown	37.5	€4.42	€6.19	€1.77	€117.76	€164.96	UK	Y	N
Tipson*	Unknown	37.5	€4.42	€6.19	€1.77	€117.76	€164.96	UK	Y	N
Tipson*	Unknown	37.5	€4.42	€6.19	€1.77	€117.76	€164.96	UK	Y	N
Tipson*	Unknown	37.5	€4.42	€6.19	€1.77	€117.76	€164.96	UK	Y	N
Tipson*	Unknown	37.5	€4.42	€6.19	€1.77	€117.76	€164.96	UK	Y	N
Tipson*	Unknown	225	€39.77	€39.77	€0.00	€176.76	€176.76	UK	Y	N
Yogi Tea	Unknown	34	€3.59	€3.59	€0.00	€105.59	€105.59	France	Y	N

*Despite similar features, these references are representing different blends of tea.

A4. Results Tables and Graphs

A4.1 Moringa Oil

A4.1.1 Country of origin

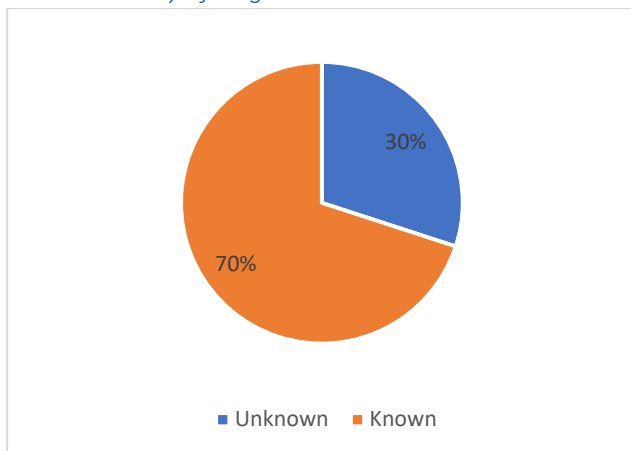


Figure 1 Chart: Oil, Knowledge of Provenance

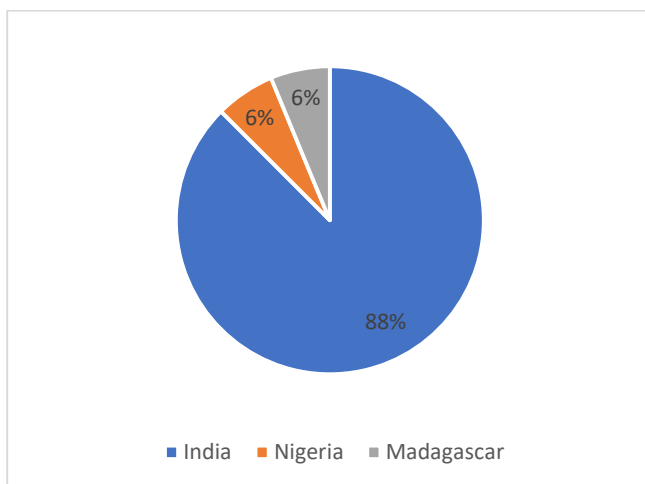


Figure 2 Chart: Oil, Country of Provenance

A4.1.2 Product Characteristics

Package Quantities (ml)

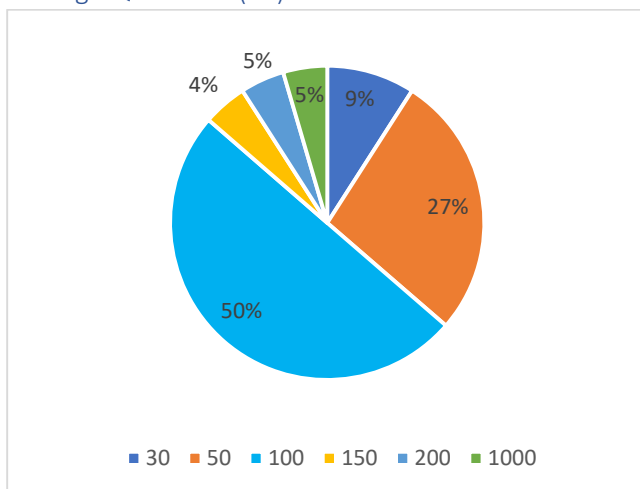


Figure 3 Chart: Oil, Package Quantities Frequency

Package Material

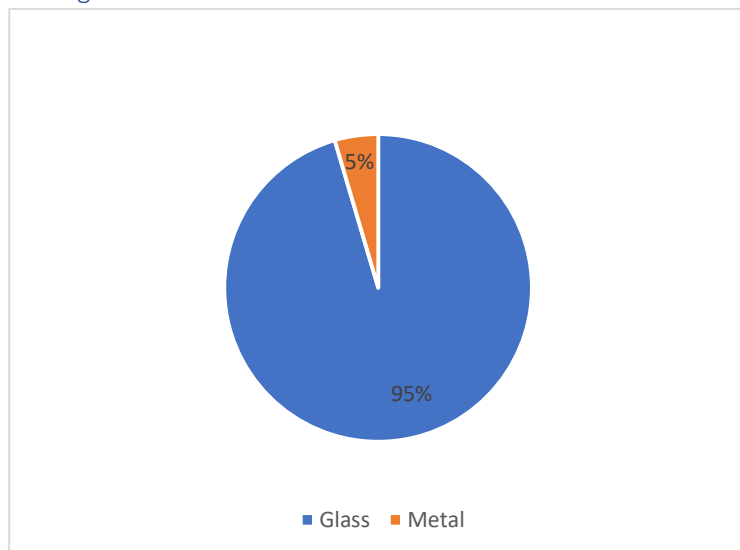


Figure 4 Chart: Oil, Package Material

Price

Countries	Average Price per litre in €
All	192.81
France	200.31
Germany	208.60
Netherlands	183.58
United Kingdom	190.07

Package Quantity	Average Price per litre in €
30 ml	359.71
50 ml	224.26
100 ml	146.12

A1.1.3 Uses

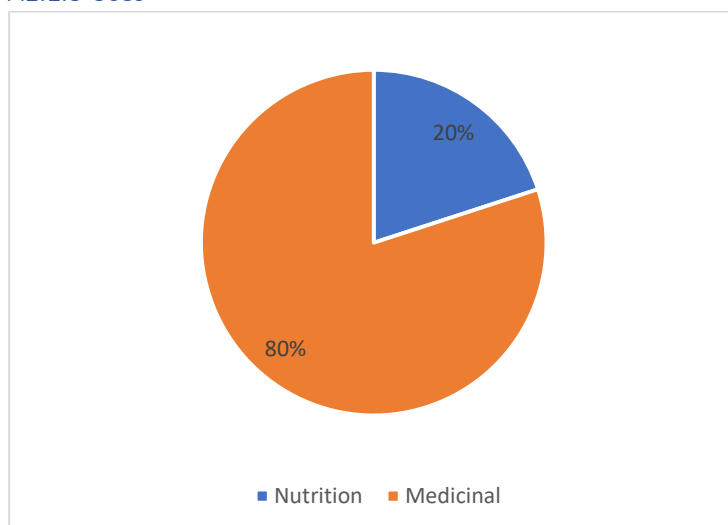


Figure 5 Chart: Oil, Promoted Use

A4.2 Moringa Pills (Tablets and Capsules)

A4.2.1 Country of Origin

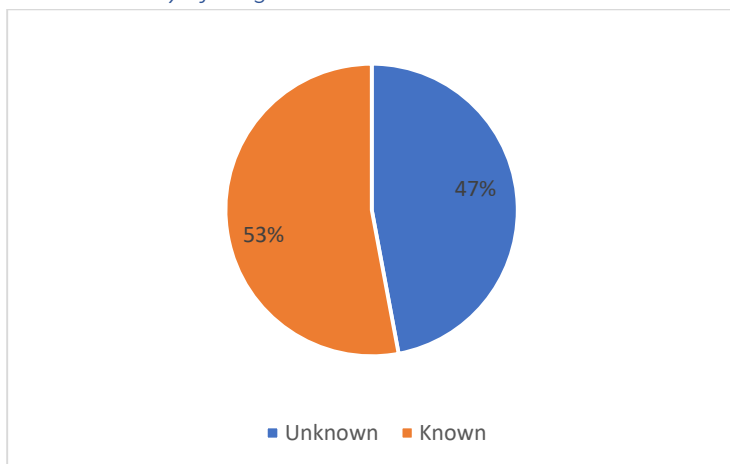


Figure 6 Chart: Pills, Knowledge of Provenance

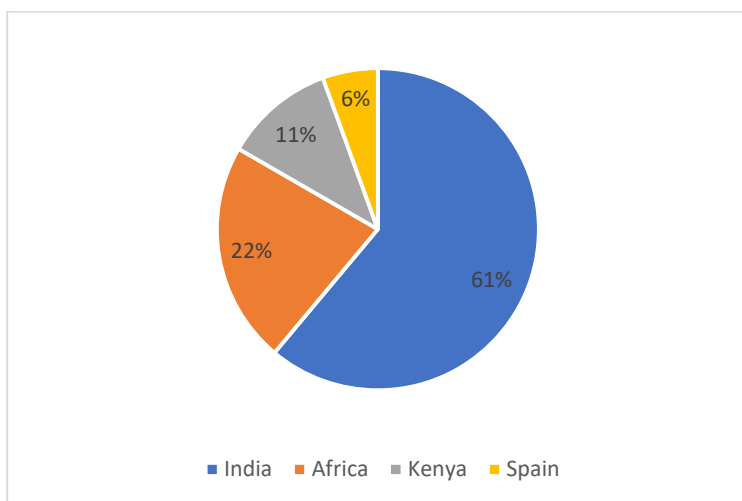


Figure 7 Chart: Pills, Country of Provenance

A4.2.2 Product Characteristics

Dosage

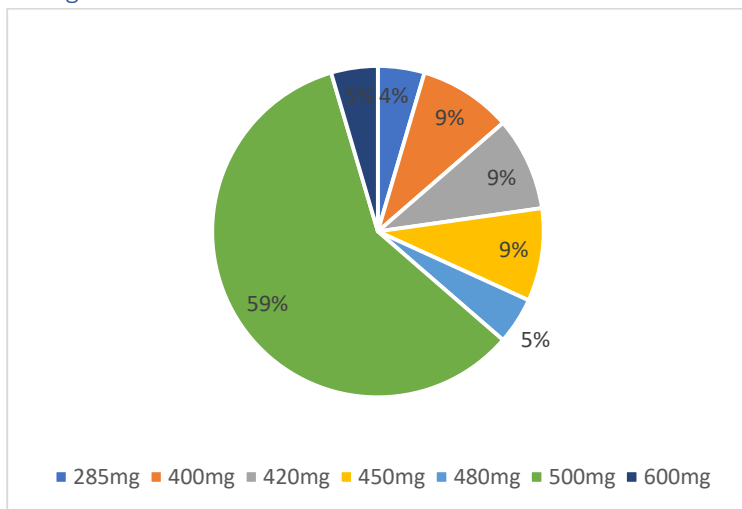


Figure 8 Chart: Pills, Dosage Capsules

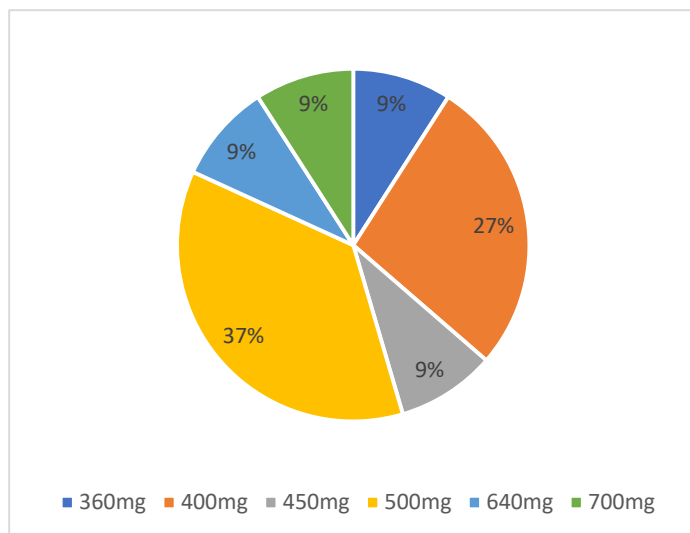


Figure 9 Chart: Pills, Dosage Tablets

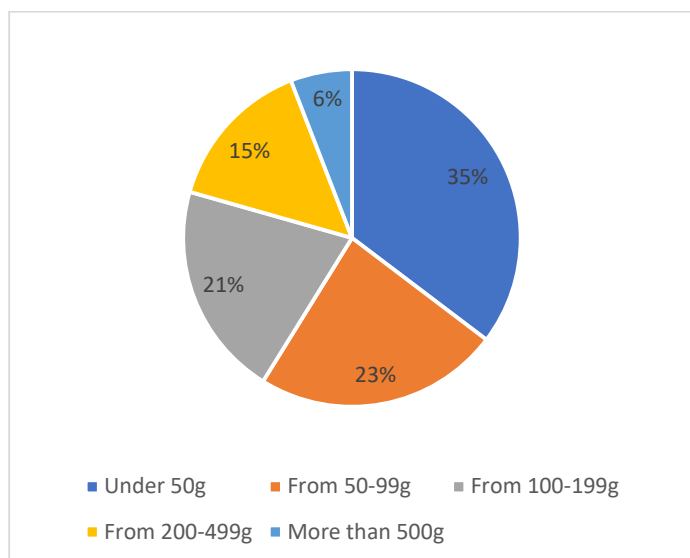


Figure 10 Chart: Pills, Package Quantities Frequency

Price

Categories	Low Average per kg (€)	High Average per kg (€)	Price variance (€)
All	304.10	341.49	+12.29%
Capsules	308,67*	346.51*	+12.25%
Tablets	292.28	312.24	+6.82%
France	378.17	383.49	+1.41%
Germany	271.30	310.52	+14.45%
Netherlands	276.02	290.30	+5.17%
United Kingdom	514.77	514.77	+0%

*Moringa Park capsule prices have been excluded.

Organic Labels

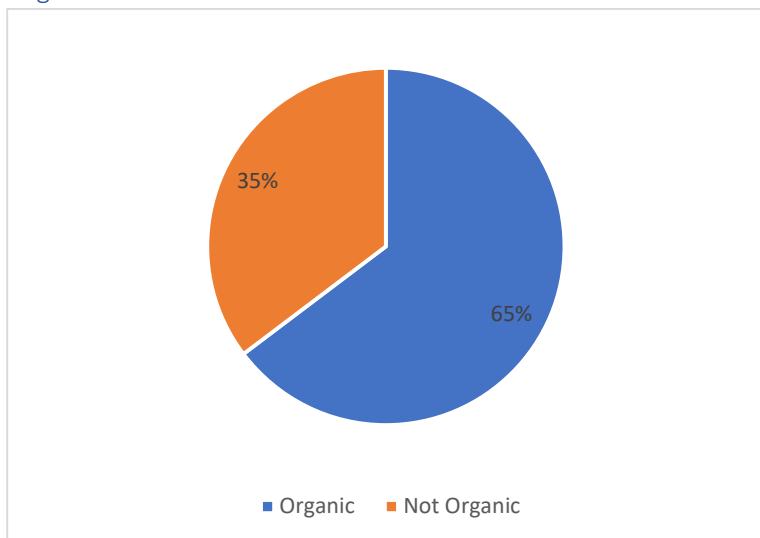


Figure 11 Chart: Pills, Proportion of Organic Labels

A4.3 Moringa Powder

A4.3.1 Country of Origin

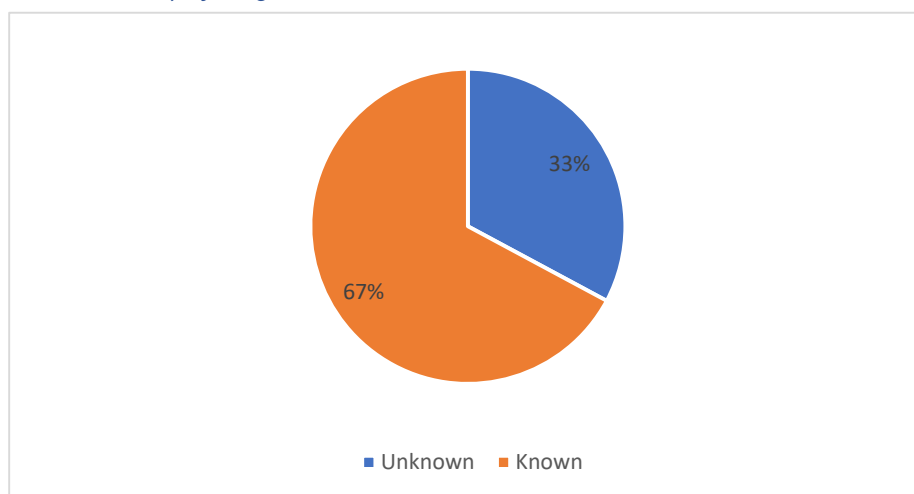


Figure 12 Chart: Powder, Knowledge of Provenance

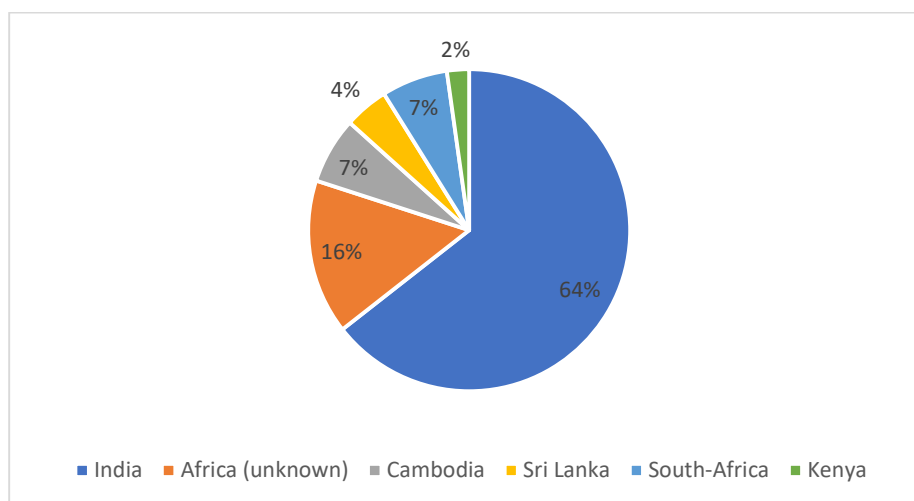


Figure 13 Chart: Powder, Country of Provenance

A4.3.2 Product Characteristics

Package

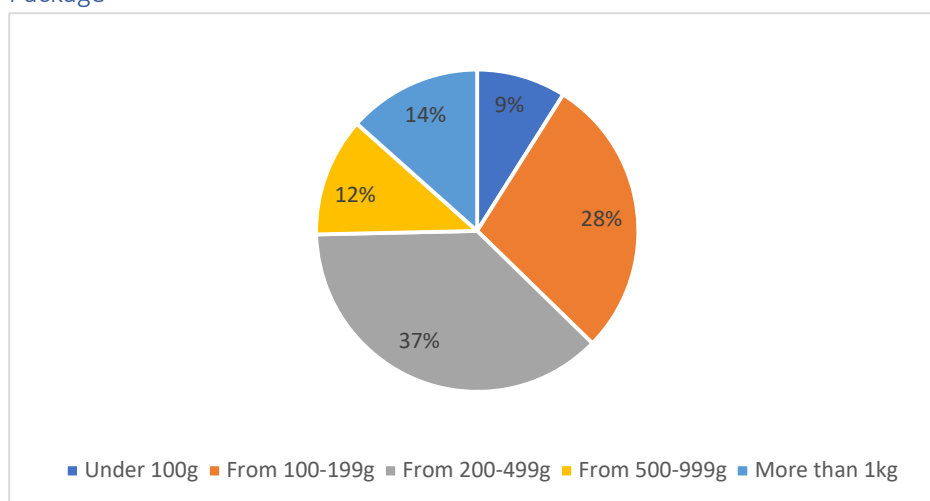


Figure 14 Chart: Powder, Package Quantities Frequency

Price

	Low Price per kg (€)	High Price per kg (€)
All	74.77	80.16
France	92.17	94.44
Germany	86.84	94.72
Netherlands	70.29	76.64
United Kingdom	62.89	68.08
100g	97.67	102.50
200g	69.99	73.22
250g	63.53	67.75
500g	52.31	54.36

Bundle

Group	Rate of references which are bundles
All	19.4%
France	25%
Germany	0%
Netherlands	42%
United Kingdom	4.8%

Organic Labels

Group	Rate of references with organic labels
All	73.1%
France	95%
Germany	75%
Netherlands	52.4%
United Kingdom	76.2%

A4.4 Moringa Tea

A4.4.1 Country of Origin

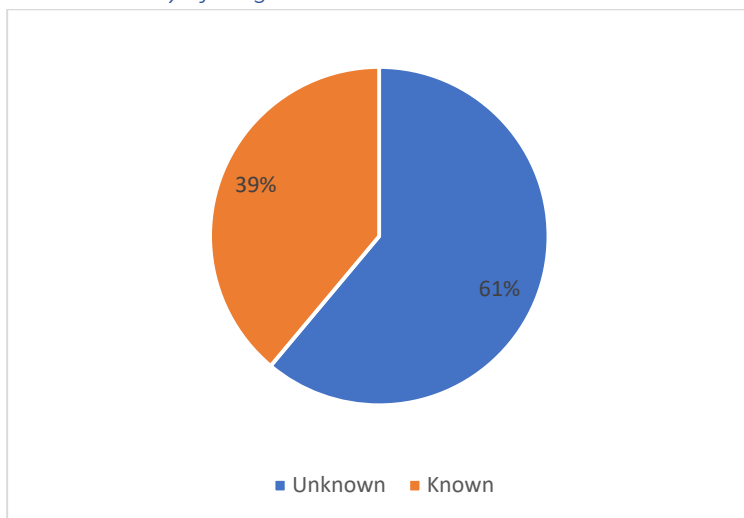


Figure 15 Chart: Tea, Knowledge of Provenance

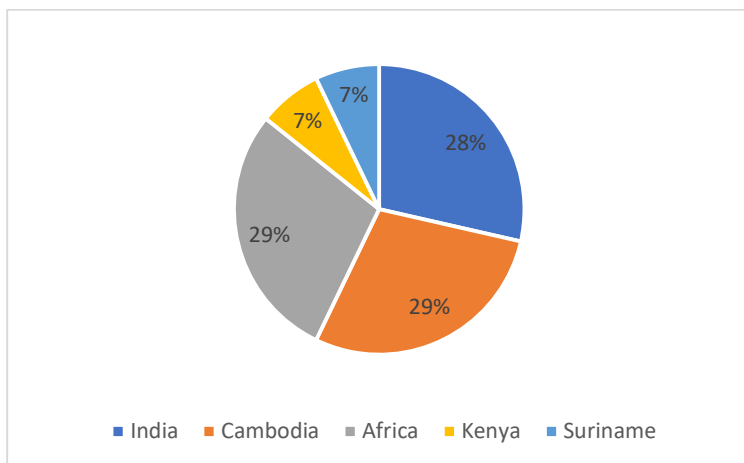


Figure 16 Chart: Tea, Country of Provenance

A4.4.2 Product Characteristics

Package

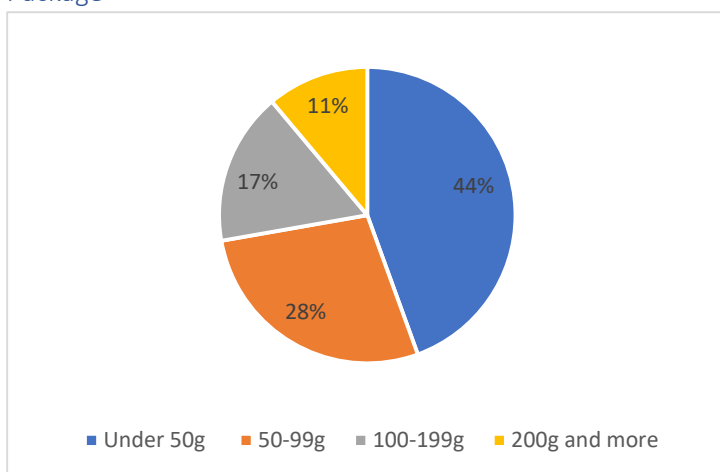


Figure 17 Chart: Tea, Package Quantities Frequency

Price

	Low Price per kg (€)	High Price per kg (€)	Variance in Price
All	148.61	161.69	+12.8%
Pure Moringa Tea	163.78	170.03	+3.8%
Mixed Tea	127.37	164.42	+29.1%
France	226.14	227.86	+0.8%
Germany	69.32	69.32	0%
Netherlands	105.09	144.48	+37.5%
United Kingdom	138.19	160.72	+16.29%
Under 50g	138.61	174.92	+26.2%
From 50 to 99g	161.48	182.95	+13.3%
From 100 to 199g	122.46	122.46	0%
200g and more	73.58	79.32	+7.8%

Organic Labels

	Rate of references with organic labels
All	72.2%
France	60%
Germany	66.6%
Netherlands	44.4%
United Kingdom	100%

A4.4.3 Pure Moringa Tea or Mixed Tea

	Rate of mixed tea on the market
All	41.7%
France	40%
Germany	0%
Netherlands	65.6%
United Kingdom	50%

A5. Country Data

A5.1 France: African Diaspora in France

(Guéry, 2018) (L'Intérieur, 2018) (Insee, Fiches thématiques - Flux d'immigration - Immigrés, 2012)
(Insee, Évolution de la population, 2020) (Etrangères, 2019)

Introduction: Immigrant population France

In 2018, out of the 67 million people who live in France, 6.5 million are immigrants who are split in the following groups:

Immigrant who have become French	2.4M
Immigrants of foreign nationality	4.1M
Total	6.5M

Diaspora In France: Composition

Immigrants living in France:

	%	Numbers (thousands)
Africa	46.1	2 991,6
Europe	33.5	2 171,2
Asia	14.5	939,5
America/Oceania	6.0	388,3

African Diaspora:

	%	Numbers (thousands)
Total	100	2991.6
Algeria	13	388.9
Morocco	11.9	356.0
Tunisia	9.2	275.2
Rest	65.9	1970.9

NB: Figures with a white background correspond to regions of Africa where moringa is commonly consumed.

A5.2 Germany: Sub Saharan Diaspora in Germany (Bundesamt, 2019) (ESI, 2020) (ICD, 2007)

Diaspora in Germany: Composition

During the 2015 census, the composition of African immigrants in Germany is the following:

Country of birth	Numbers
Eritrea	59800
Nigeria	50440
Somalia	33900
Ghana	32870
Cameroon	21610
Ethiopia	18425
The Gambia	15710
Senegal	12090
Guinea	11955
Kenya	11171
DRC (Congo)	10608
Togo	10071

Only the most relevant and major groups (>10000 individuals) are here represented.

A5.3 Netherlands: The Afro-Dutch Community (CBS, 2020) (ICD, 2007)

Diaspora in the Netherlands: Composition

While most of the Afro-Dutch immigration community comes from Africa, a non-negligible part of the immigration population comes from the former Dutch Antilles in relation to the colonial past of the Kingdom. For more details, look at the following table:

Country	2000	2010	2019
Dutch Antilles	107197	138420	161265
Suriname	302514	342279	353909
Africa total	413 523	562 236	693072

North Africa (Tunisia/Morocco/Algeria/Egypt/Libya)	290014	386879	455891
Rest of Africa	123509	175357	237181
The Gambia	335	841	1631
Senegal	877	1568	2020

A5.4 United Kingdom: Afro Communities.

(ONS, 2011) (Aspinall & Chinouya, 2016) (ICD, 2007)

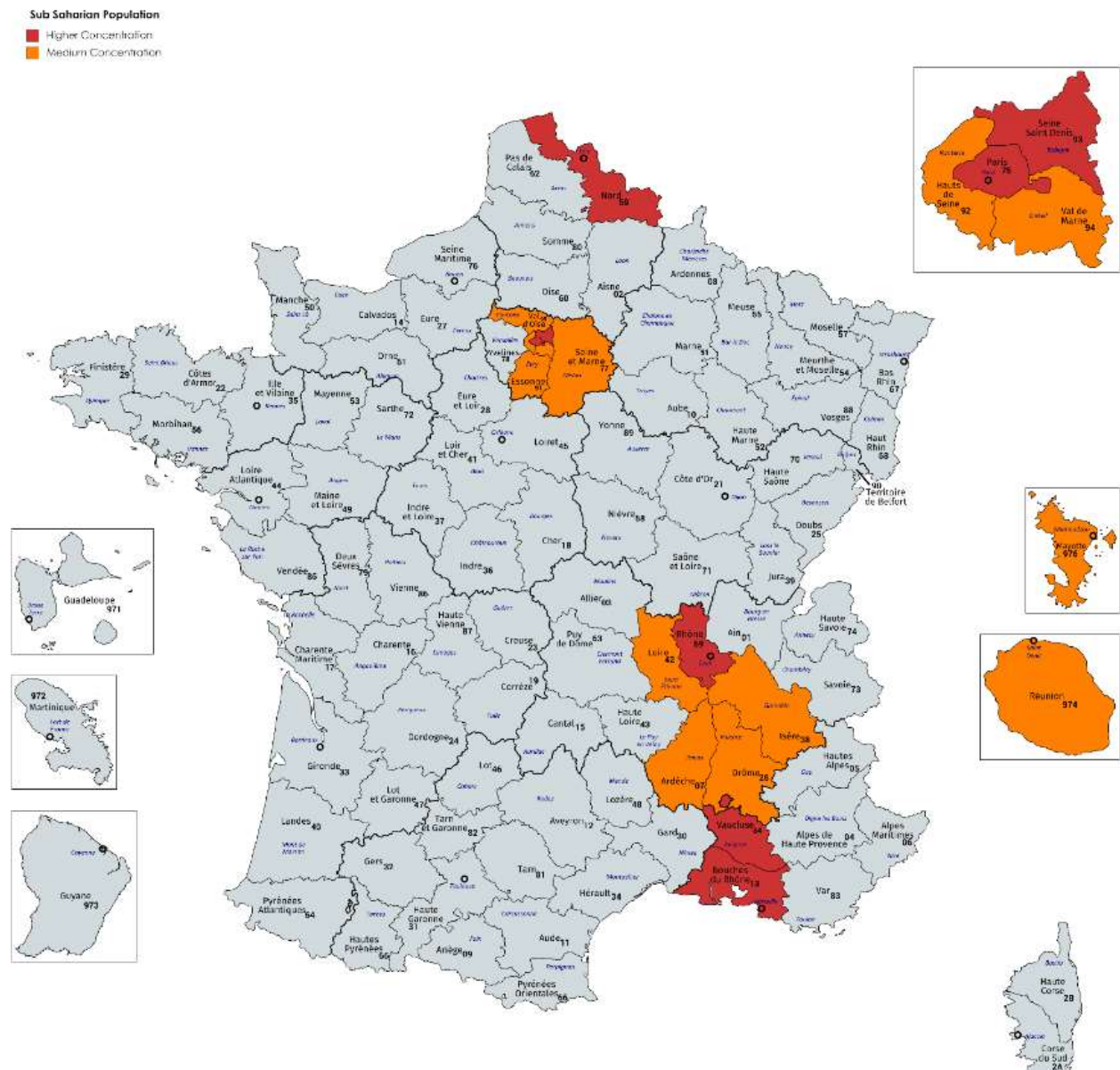
African Diaspora in the UK: Composition

According to the 2011 census data on UK ethnic groups:

Group/UK	%	Numbers (thousands)
All	100	1904.7
Black African	53.6	1020.9
Black Caribbean	31.2	594.8
Other Black	15.2	289.9

A6. Geographical Spread

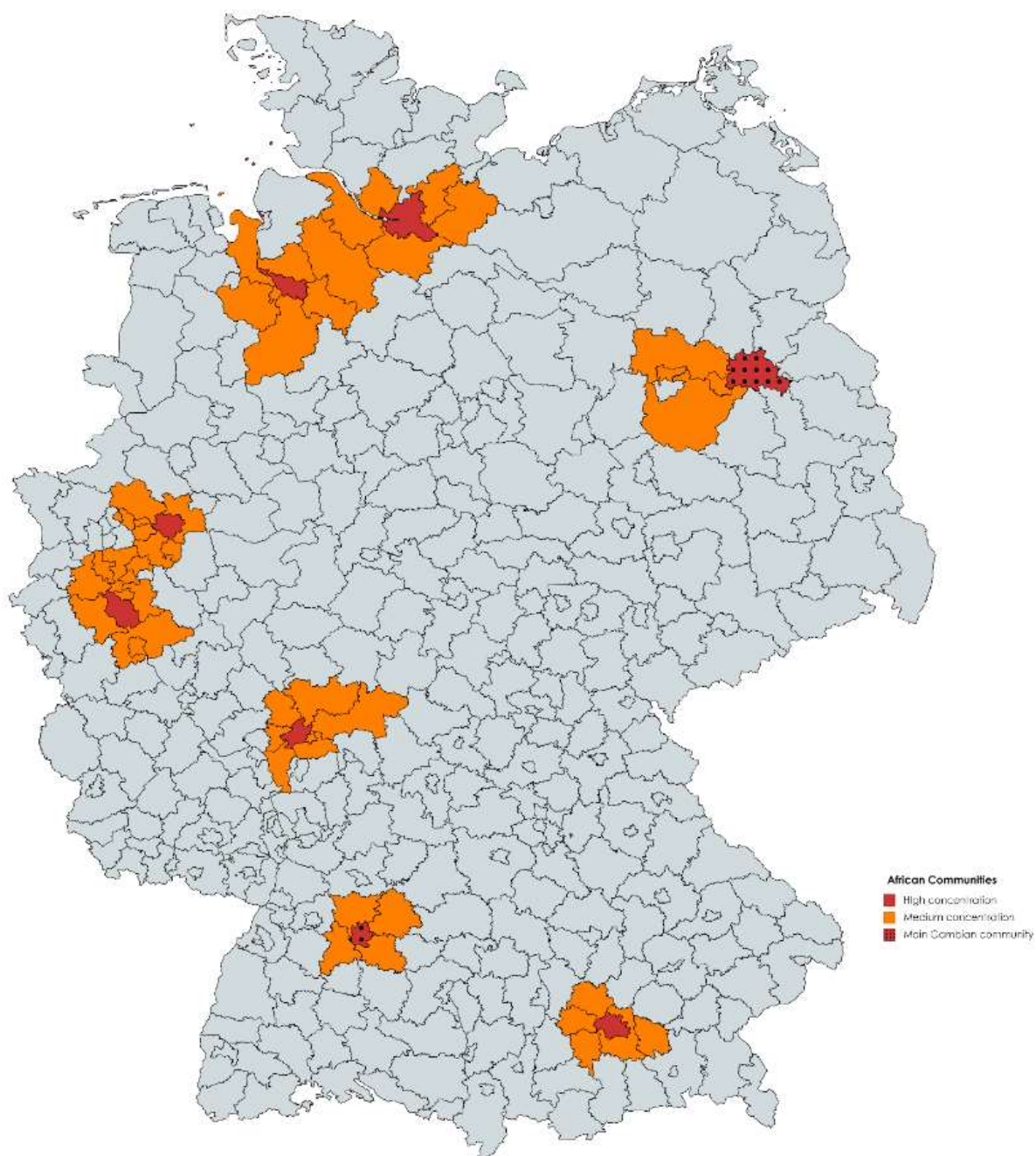
A6.1 France



Note: Regarding Geographical Immigrant Data in France

It is illegal in France to officially collect race data. This interdiction dates from World War 2 when search data was used against the Jewish population. The only available sources are news articles and communities themselves.

A6.2 Germany

*All communities*

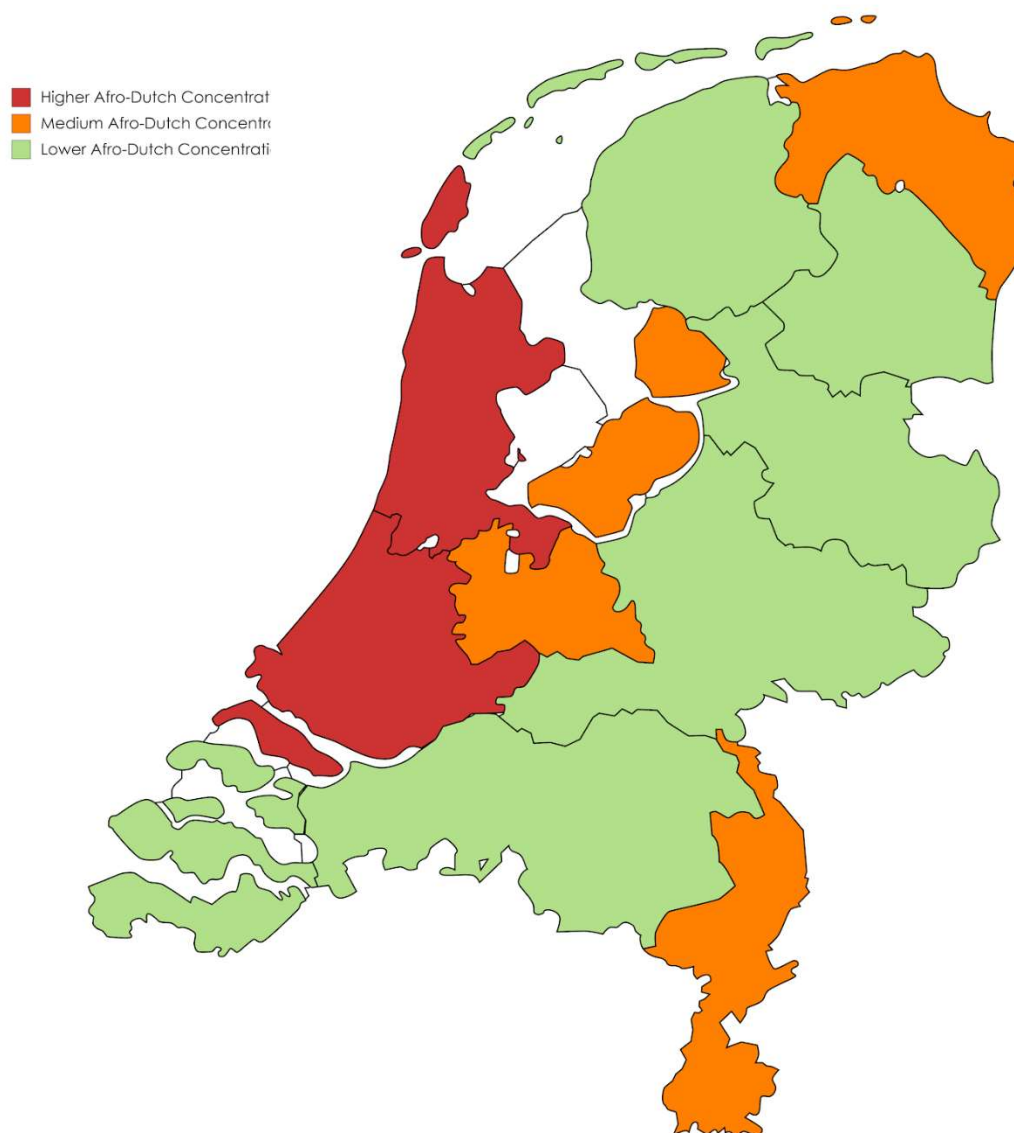
City	Numbers (approximates)
Berlin	70000
Hamburg	54000
Frankfurt	14000
Munich	14000
Dortmund	12000

Cologne	11000
Bremen	9000
Stuttgart	8000

Gambian Community

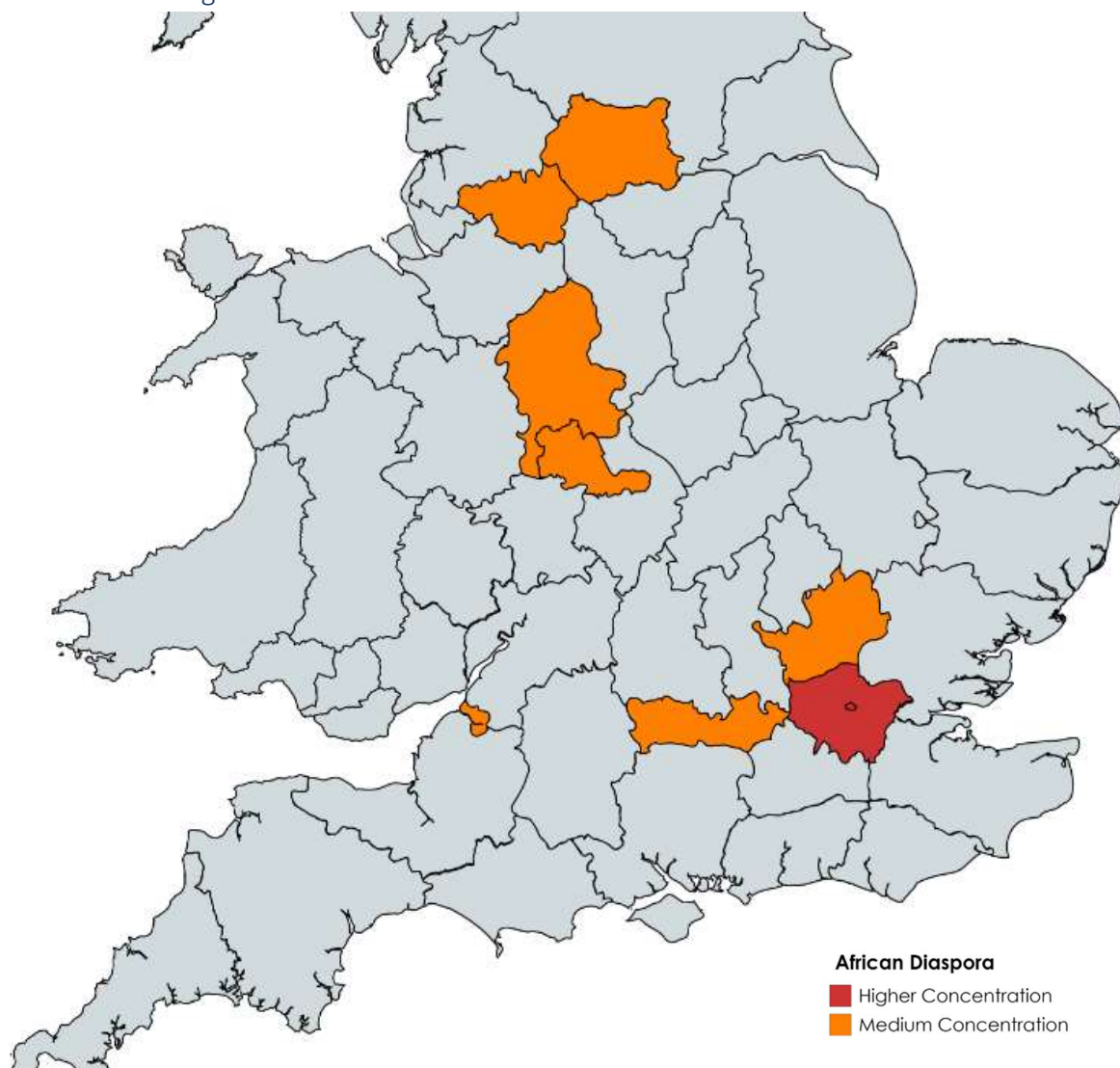
It seems that the Gambian community is mainly present in Berlin and Stuttgart.

A6.3 Netherlands



Studies show that most Afro Dutch communities are in large cities, particularly Amsterdam, Rotterdam and the Hague.

A6.4 United Kingdom



In the UK:

Region	%	Numbers (thousands)
UK	100	1904.7
England	99.7	1900.0
London	57.2	1090.0

In London:

Borough	% of total population of the Borough
Lewisham	27.2
Southwark	26.9
Lambeth	25.9
Hackney	23.1

Croydon	20.2
Barking and Dagenham	20.0
Newham	19.6
Greenwich	19.1
Haringey	18.8
Brent	18.8

Outside London

City	% of the population of the city	Numbers
Birmingham	9	96360
Manchester	8.6	43484
Leeds	3.45	25893
Bristol	6	25734
Reading (Berkshire)	6.7	22921
Nottingham	7.3	22185
Leicester	6.2	20585
Luton	9.8	19909
Wolverhampton	6.9	17309

A7. Indian Diaspora in the UK

2011 Census Data, main concentration of Indian population in the UK:


Region	%	Numbers (thousands)
UK	100	1451,9
England	96.1	1395,7
London	37.4	542,9
West Midlands	12.8	185.3
South-East	10.5	152.1
East	8.0	115.6
North-West	7.4	107.4

Significant Indian Communities:

Region	Communities (Where the Indian community represents more than 10% of the population)
London	Harrow Hounslow Brent Redbridge Ealing Newham
West Midlands	Wolverhampton Sandwell
South-East	Slough
North-West	Blackburn Preston


A8. Labels

A8.1 French Labels


<i>AB-Agriculture Biologique</i>

https://agriculture.gouv.fr/lagriculture-biologique-ab
Products which are 100% organic or 95% if transformed.


<i>Bio Cohérence</i>


http://www.biocoherence.fr/
A special label encompassing the whole logistic chain with a heavy focus on environmental and social progress.

<i>Nature Progrès</i>

https://www.natureetprogres.org/
An extension of the AB label with an emphasis on sustainable goals.


A8.2 German Labels

<i>Bio Siegel</i>

https://www.oekolandbau.de/en/bio-siegel/
General German organic label for products containing at least 95% of organic ingredients.


<i>Naturland</i>

https://www.naturland.de/en
Managed by an important organic agriculture association counting nearly 50000 members. Dedicated to the production of organic crops in Germany and elsewhere.


<i>Bioland</i>

http://www.bioland.de/
Organic label which follows the same restrictions as the European organic label. It also addresses social elements such as working conditions but does not mention a minimum wage for producers for example.

A8.3 Dutch Labels

<i>Eko</i>

https://www.eko-keurmerk.nl/
The Dutch reference praised by the IFOAM. No GMOs or chemicals. Crop rotation must be in place if applicable. 95% of ingredients must be from organic agriculture.

A8.4 British Labels


<i>Soil Association</i>

https://www.soilassociation.org/
<p>Founded in 1946 by a group of farmers noticing the link between humans, their activities and the impact on nature.</p> <p>The label is dedicated to agriculture without chemicals, GMOs or animal mistreatment.</p>

<i>Vegan Society</i>

https://www.vegansociety.com/
Recognised internationally for products without animal testing and 100% of vegetal origin.

<i>Organic Farmers and Growers</i>
 The logo for Organic Farmers and Growers, featuring the text 'ORGANIC FARMERS GROWERS' in a bold, sans-serif font, with 'Organic Certification UK2' in a smaller font below it. The logo is set against a green background with a stylized white wave or leaf pattern.
https://ofgorganic.org/
Legally recognised and used frequently by UK local producers.

A8.5 European and International Labels

<i>European Organic Label</i>
 The European Organic Label logo, which is a green square containing a white circle of stars, similar to the European Union flag, with a white leaf-like shape in the center.
https://www.ifoam-eu.org/en/detailed-implementing-rules/labelling https://ec.europa.eu/info/food-farming-fisheries/farming/organic-farming/organics-glance/organic-logo_en
Legal requirement. Present everywhere.

<i>Ecocert</i>
 The Ecocert logo, which is a red oval containing the word 'ECO' in a stylized font above the word 'CERT'.
https://www.ecocert.com/en/certification
Independent organism recognised and certified in multiple countries, it is focussed on the ingredients and their organic nature and sourcing.

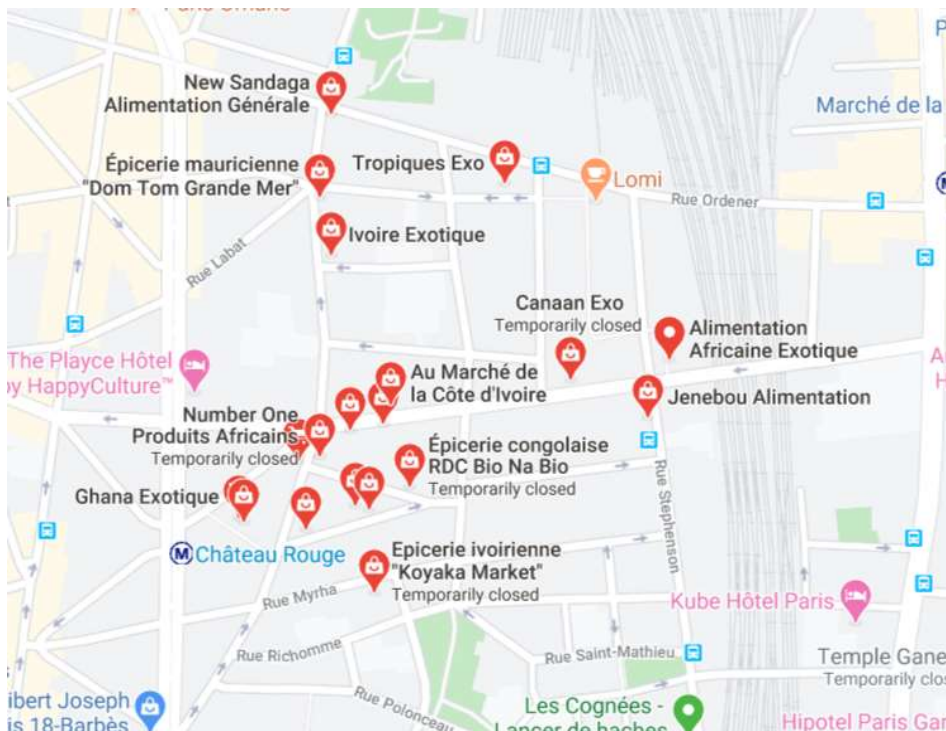
A9 Shops in Paris and Surroundings

A9.1 African Drugstores/Grocery stores Paris

Central Paris



Map shows concentration of African drugstores and grocery stores in Paris. See for map below for details.



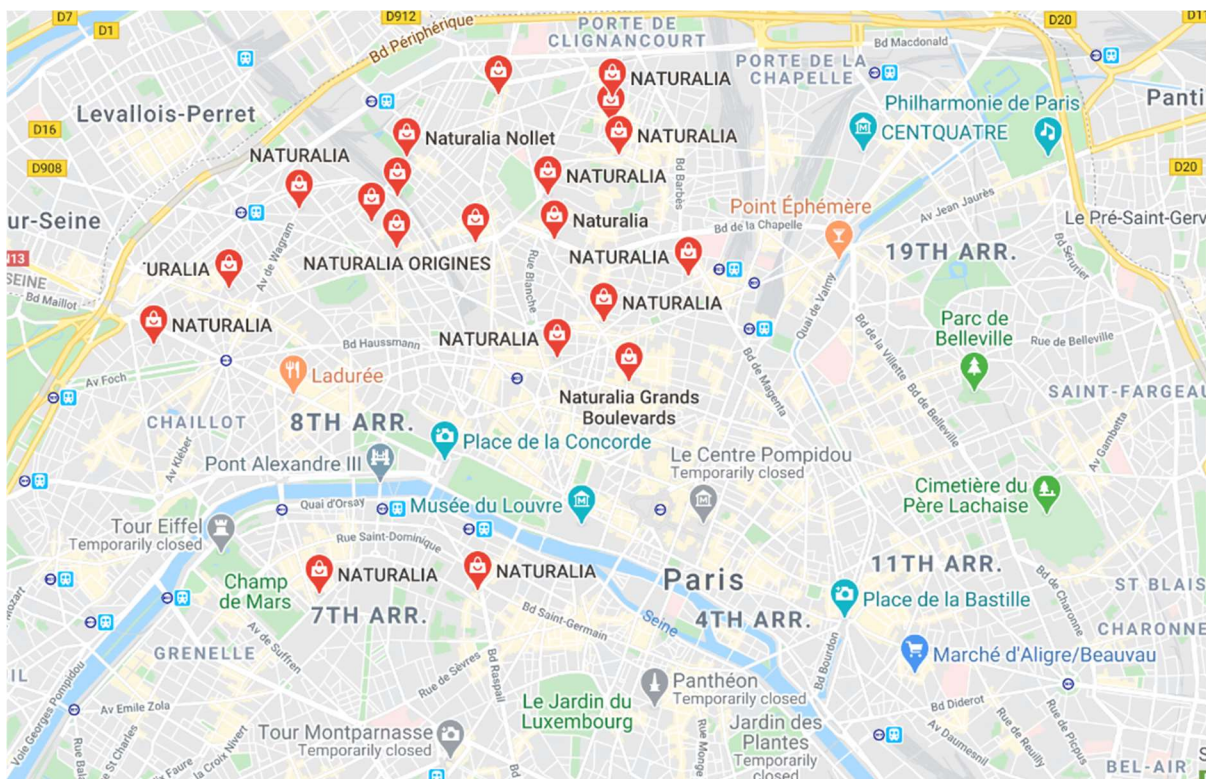
Montreuil

Just outside Paris is another important community of African immigrants and descendants of immigrants with another large concentration of African grocery shops.



A9.2 Organic Stores: Naturalia

Presence of Naturalia shops in Paris. (Naturalia, 2020)



A10 Industry Groups and Agents

Name	Africorp
Description	A consultancy firm that produces but also helps others in their efforts to develop and export.
Link(s)	http://africrops.de/en/consultancy/

Name	Import promotion desk
Description	A company helping exporters who wish to sell their products in the European market. A slight focus on the German market.
Link(s)	https://www.importpromotiondesk.com/en/

Name	Institute for Agriculture and Trade Policy
Description	Organisation that helps exports to bring their products to other countries.
Link(s)	https://www.iatp.org/

Name	The Z company
Description	A Dutch based company with multiple activities, including the role of agent.
Link(s)	https://www.z-company.nl/about-us/ https://www.z-company.nl/wholesale/moringa-powder/ https://www.z-company.nl/wp-content/uploads/2019/07/PRO5647-Moringa-Powder-organic.pdf

A11 Online Shop Elements

VC	Very Common
V	Variable
UC	Uncommon

Practice	Frequency	Description
Available Bundle	V	<ul style="list-style-type: none"> If the product is in a bundle available on the website, there is a mention of it.
Benefit Pages	V	<ul style="list-style-type: none"> A dedicated page for the benefits of the products' ingredients.
Blog	V	<ul style="list-style-type: none"> Blog giving background information about producer.
Delivery Price	V	<ul style="list-style-type: none"> If applicable, either mentioned at the top of the page or next to the price. Often excluded from said price.
FAQ	VC	<ul style="list-style-type: none"> FAQ about the product (on the page most of the time) and about the seller (on a dedicated page most of the time)
Organic Certification	V	<ul style="list-style-type: none"> Photos of the labels that the product has.
Organic Label Archive	UC	<ul style="list-style-type: none"> In certain cases, an archive describing all the labels that the brand has managed to acquire.
Partners List	VC	<ul style="list-style-type: none"> A list of partners: universities, NGOs, ...
Scan of Package Label.	UC	<ul style="list-style-type: none"> Scan of the label that is on the package.
Photos of the Product	VC	<ul style="list-style-type: none"> Photos of the product: stock photos on white background or
Press Links	V	<ul style="list-style-type: none"> Page or link to news articles which mention the product.
Price per Quantity	V	<ul style="list-style-type: none"> Price per unit is completed by a price per 1kg/100g/100ml
Product Range	VC	<ul style="list-style-type: none"> Different quantities, bundles of a same product are presented next to each other.
Recipe List	V	<ul style="list-style-type: none"> A page dedicated to recipes in which the product can be used (for powder) or with which it can be well consumed (for tea)
Review and Rating System	V	<ul style="list-style-type: none"> Possibility to leave a review or a rating of the product in question.
Social Media	VC	<ul style="list-style-type: none"> Social media logos with links to twitter, Instagram, ...
Subscription Offer	UC	<ul style="list-style-type: none"> A cancellable subscription which leads to a monthly delivery of the moringa product. This is accompanied by a discount on the product on the long run.
Table of Ingredients	V	<ul style="list-style-type: none"> A table that lists, for a certain quantity (either per 100g/1 pill/1 teabag), the amount of vitamins, minerals and other beneficial elements contained in the products.
Theme*	VC	<ul style="list-style-type: none"> Common theme between packages of products and website. (for brand shops only)
Use/Application List	VC	<ul style="list-style-type: none"> A paragraph, list or page which details how the product can be used and at which frequency (for pills) it should be used.

A12 Operationalisation Table

Concept	Dimension	Sub Dimension	Indicators
Product	Type	Variety of Brands	<ul style="list-style-type: none"> Number of brands having at least one item of a product belonging in this category.
		Geographic Variety	<ul style="list-style-type: none"> Number of countries that has a product of this type.
		Sample size	<ul style="list-style-type: none"> Number of references within one product category.
	Origin	Knowledge of Production Site	<ul style="list-style-type: none"> Proportion of brands disclosing the location from which they source their moringa.
		Localisation of Production Site	<ul style="list-style-type: none"> Country/region where the moringa was cultivated and harvested. Predominance of one or multiple regions for a certain product.
	Package	Material	<ul style="list-style-type: none"> The confirmed material from which the package is made off. In case of multiple types, the proportion and conditions under which material is used.
		Quantity held	<ul style="list-style-type: none"> Quantity, measured in litres or kilograms, of product inside the package of the reference. Variety of package size for one category. Most commonly represented package size. Presence of Sub-packages within a reference.
	Organic Labels	Necessity	<ul style="list-style-type: none"> Frequency of practice. Normalisation of labels.
		Typology	<ul style="list-style-type: none"> Choice of label per country and overall.
	Other factors	Category	<ul style="list-style-type: none"> Emerging factors of importance which emerge for a specific category of references.
	Price	Price per unit	<ul style="list-style-type: none"> Price per unit sold. Original currency of the price.
		Price per kg/L	<ul style="list-style-type: none"> Converted price per kg/L (depending on the sort of product) Impact of packaging difference on price.
		Price variance	<ul style="list-style-type: none"> Difference in price for a reference between shops.
Place	Moringa Consumers	Numbers	<ul style="list-style-type: none"> Presence of populations already familiar with moringa. Numbers of moringa consumers per country.
		Localisation	<ul style="list-style-type: none"> Concentration of population consuming moringa.
		Accessibility	<ul style="list-style-type: none"> Ease of access to consumers of moringa.
	Shops	Likelihood of interest	<ul style="list-style-type: none"> Confirmed interest for moringa products or similar plant-based products.
	Promotion	Price promotion	<ul style="list-style-type: none"> Systematic use of prices and the prospect of lower prices to attract consumers.
		Bundles	<ul style="list-style-type: none"> Availability of bundles of a certain reference.

			<ul style="list-style-type: none"> • Frequency of practice. • Effect of bundle on prices.
		Non-price tools	<ul style="list-style-type: none"> • Practices and tools used to promote the product and push consumers to buy.