AFRICA has the most diverse food and cuisine on the planet. Its US$ 313 billion food and beverage market is projected to reach US$ 1 trillion by 2030. This projection offers the prospect of increased jobs, greater prosperity, reduced hunger and improved opportunities for African farmers and entrepreneurs to participate in the global economy.

Online food delivery is one of the fastest-growing online segments as players in the sector seek to reach online consumers with a convenient and affordable delivery experience. In parallel, the pandemic has seen more people in isolation turn to online services as offline channels were largely disrupted. As the pressure of the pandemic is heavily felt across the restaurant industry, the shift to online food delivery becomes more important as an option for these businesses to reach consumers. Where nationwide lockdowns were implemented (Morocco, South Africa and Tunisia), a clear acceleration was observed in that direction.

Post-COVID-19, online food delivery is changing habits in unexpected ways for businesses and consumers. The growing popularity of fast food, coupled with the growing trends for convenience and value for money, have opened up opportunities in the African Food market. Over the last three years, the growing online audience has seen an increase in international brands setting up shop on the Continent to tap into the growing middle-income segment. Increased international interest through direct investment by players such a KFC, McDonalds, Burger Kings. Online Food delivery players such as Jumia have also played a key role in shaping supply chains and opening up the markets to new entrants. Local producers and restaurants have indeed embraced this evolution and reached new consumers as well as grew their businesses in spite of these challenging times.

E-Commerce in Africa is still at its infancy by global standards standing at less than 2 % vs north of 20% in China or 12% in the USA. It has promising potential.. New innovations in the food industry, one of the world’s oldest and largest industries, are creating attractive opportunities for women and youth on the African continent. More than 5 million jobs can be created in 2025 in Africa by Online Marketplace.

Jumia Food is the most used online food delivery service with the widest geographical reach in Africa operating in 9 countries including Nigeria, Côte d’Ivoire, Kenya, Morocco, Tunisia, Ghana, Uganda, Algeria and Senegal. As a leader, Jumia will continue to deploy capabilities across the food value chain to ensure consumers buy food online safely and at the right price, in line with the theme of this year’s World Food Day celebration of Grow, Nourish, Sustain Together.
AFRICA FACTS

POPULATION

1.3 Bn

2020

Average age of 19.5yrs
2.5 Bn by 2050.

GDP GROWTH

$313 Bn

2019

Projected to reach US$1 trillion by 2030. 0.3% of total revenue will be generated through online sales by 2023.

FOOD & BEVERAGE MARKET

35%

35% of jobs in urban areas are in the food economy, 60% are in the restaurant sectors.

COVID-19

1.5 M

POSITIVE CASES

October 15th 2020

Least affected Continent, but strong and social economic impact.

JOB CREATION

3 M

est. 2025

Online marketplaces in Africa can create about 3 million jobs by 2025.
JUMIA FOOD is the leading Pan-Africa Food delivery company operating in 9 countries in the Continent. The consumers can order restaurant meals, groceries, beverages, pharma care, and supermarket products and have them delivered in less than 45 minutes.
HYGIENE FIRST

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

CASHLESS PAYMENTS

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

CONTACTLESS DELIVERIES

The #JumiaHeroes deliver millions of items and meals while remaining safe and making consumers safe, thanks to the adoption of contactless delivery methods.
COVID-19

SUPPORTING THE COMMUNITIES

SUPPORTING MARKET VENDORS
Jumia and the United Nations launched an e-commerce platform to sustain supply chains for MSMEs and connect them with consumers online to sustain livelihoods as part of the response to the COVID-19 pandemic.

SHOFCO PARTNERSHIP

MCDONALD’S PARTNERSHIP
Jumia partnered with McDonald’s by sharing its expertise in the logistics sector to deliver meals to health workers and thus help in the fight of the COVID-19 pandemic in Morocco.
How do you believe COVID-19 has impacted the food market & communities in Uganda and in Africa?

The COVID-19 pandemic created a global crisis with far reaching health, social and economic impacts: health systems have been strained, national crisis response systems have been tested, social support systems challenged, and pressure on the national budget drastically increased partly due to measures enforced to respond to the pandemic. Restrictions on movement have led to closure of businesses, impacting supply chains of key sectors and disrupting trade. This has come at a price, with measures disrupting business flow, cutting off hundreds of informal market vendors from their usual customers, affecting incomes and straining sustenance of livelihoods. The crisis had devastating effects on the private sector and most especially on the urban informal food markets that are dominated by women and youth who largely deal in perishable food produce like fruits and vegetables with meagre daily incomes. These urban informal food markets play an important role in connecting rural farmers with urban markets, keeping the supply chain for agricultural produce active, and providing employment. According to the National Labour Force Survey (2016/17), the informal economy alone employs 84.9% of the population, 90% of whom are youth (10-30 years). The UN Socio-economic impact assessment of COVID-19 in Uganda has revealed that approximately 1.9 million people are estimated to have fallen into poverty as a result of the first eight weeks of lockdown alone. In addition, the size of the middle class could reduce by 5.2 percentage points, sending many of those households into the non-poor insecure; the increase in unemployment and loss of incomes could increase poverty among wage earners and casual labourers by 15.7 percentage points; the reduction in incomes of informal micro small and medium enterprises (MSMEs) has taken a heavy toll, with potential to push 46% of workers employed in informal businesses, 43% in hospitality industry and 41% in trading and services below the poverty line, with a disproportionate impact on women.

What are some of the digital & tech solutions needed to support relevant stakeholders in the food supply chain? In Uganda and Africa

Digital technologies are transforming our world today more than ever before. The physical world is being digitized rapidly to augment human capabilities. However, half the world today remains offline. These technologies and others offer new means of addressing complex global challenges. Keeping supply chains active for the informal segment of the business sector is an imperative to respond to COVID-19 and build forward better. Online platforms are a viable option to achieve business continuity for MSMEs at scale. E-commerce has emerged as the answer to sustaining supply chains. Digital solutions offer some of the most powerful avenues to address current supply chain and market challenges while boosting online trading, marketing, and giving the customers a fast, safe and convenient experience. E-commerce is also an opportunity to position MSMEs to quickly pivot and re-think their online strategies as well as re-purpose their assets and resources to take advantage of the technological dividends. The COVID-19 disruptions are unleashing the realization of the full
The United Nations Development Programme (UNDP) in partnership with Jumia Food Uganda recently launched an initiative that is using e-commerce to connect the informal sector including market vendors to potential consumers, what do you believe the social & economic impact will be on both the vendors and consumers?

The UNDP and Jumia initiative to connect the informal sector including market vendors to potential consumers through e-commerce is bringing vulnerable groups of people in the informal sector such as women, youth and persons with disabilities into the digital economy. On 8th of May 2020 when the initiative was launched, we started off with only 5 markets Nakasero, Nakawa, Wandegeya, Bugolobi and Kalerwe, but only 3 weeks into the partnership, 2 more markets Naalya and Kibuye applied to join the platform given the demand from the residents in those areas. All these seven markets are now online with over 1,500 vendors now registered and selling their assorted produce online. This has significantly helped to promote business continuity for small informal market vendors in the wake of the lockdown and social distancing measures introduced to curb the spread of COVID-19. The online platform is sustaining MSME’s. E-commerce presents numerous opportunities. It is strategic to empower vulnerable groups and those hardest hit in the informal sector connecting them with buyers. It also connects rural farmers with the urban markets, keeping the supply chain for agricultural produce active and providing employment and mitigate effects of the COVID-19 on the economy. The benefits are targeted to reach the vulnerable businesses through direct and indirect employment; creating opportunities for young innovators, creating jobs in transport and distribution systems for agricultural produce, connecting vendors and farmers to niche markets, promoting the trade and ICT industry, building smart cities and decongesting urban settings. And to the consumer it delivers innovative, convenient, and affordable online services while helping businesses to thrive. On the flip side of the customer, the e-commerce market is witnessing a huge upsurge in growth from buyers shifting to online shopping. Many digital platforms are experiencing accelerated activity including an upswing in consumer adoption. Consumers are quickly embracing technology, and the benefits of buying a massive range of goods from numerous categories both perishable and non-perishable, with a single click more easily and conveniently from their homes. Uganda has progressed well in building infrastructure for internet connectivity, with over 14 million users in a population of approximately 45 million people. The Government is prioritizing inclusive digital transformation processes, and we anticipate that the decrease in internet costs will create an enabling environment for businesses to thrive online. I am pleased to say that UNDP’s partnership with JUMIA is already informing collaboration between the government and private sector to shape the regulatory landscape for online markets in Uganda. The learnings gathered from this experiment will feed into the national strategy on e-commerce that is in the pipeline, pointing to a holistic approach for e-commerce and the trade sector development in the country.
ONLINE FOOD CONSUMERS TRENDS

JUMIA DATA*

MOST POPULAR CUISINES
1. BURGER
2. CHICKEN
3. PIZZA
4. AFRICAN
5. KEBAB

Deliveries from Quick Service Restaurant are the destination of choice for consumers in Africa due to affordable prices.

DAY OF DELIVERY

<table>
<thead>
<tr>
<th>Day</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>MONDAY</td>
<td>8%</td>
</tr>
<tr>
<td>TUESDAY</td>
<td>12%</td>
</tr>
<tr>
<td>WEDNESDAY</td>
<td>14%</td>
</tr>
<tr>
<td>THURSDAY</td>
<td>14%</td>
</tr>
<tr>
<td>FRIDAY</td>
<td>17%</td>
</tr>
<tr>
<td>SATURDAY</td>
<td>17%</td>
</tr>
<tr>
<td>SUNDAY</td>
<td>18%</td>
</tr>
</tbody>
</table>

With COVID-19, consumers are ordering more during the week, but week-ends remains the busiest.

CONSUMERS' AGE

<table>
<thead>
<tr>
<th>Age Range</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>18 - 24</td>
<td>28%</td>
</tr>
<tr>
<td>24 - 34</td>
<td>43%</td>
</tr>
<tr>
<td>34 - 44</td>
<td>18%</td>
</tr>
<tr>
<td>44 - 45</td>
<td>6%</td>
</tr>
<tr>
<td>55+</td>
<td>5%</td>
</tr>
</tbody>
</table>

Urban, young and tech savvy people under the age of 34 are the largest segment.

GROWING CUISINES
1. AFRICAN
2. ORGANIC SALADS
3. CHINESE
4. ITALIAN PASTA

African meals & organic food are growing fast due to new demand for local & healthy food.

TIME OF MEALS

<table>
<thead>
<tr>
<th>Time</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>BREAKFAST</td>
<td>3%</td>
</tr>
<tr>
<td>LUNCH</td>
<td>57%</td>
</tr>
<tr>
<td>DINNER</td>
<td>40%</td>
</tr>
</tbody>
</table>

Curfews & lockdowns have changed behaviors. Dinner orders increased but consumers orders more for lunch.

DELIVERY TIMINGS

ON AVERAGE IN FIVE MAIN CITIES

<table>
<thead>
<tr>
<th>City</th>
<th>Average Delivery Time (min)</th>
</tr>
</thead>
<tbody>
<tr>
<td>CASABLANCA</td>
<td>31</td>
</tr>
<tr>
<td>NAIROBI</td>
<td>37</td>
</tr>
<tr>
<td>KAMPALA</td>
<td>38</td>
</tr>
<tr>
<td>TUNIS</td>
<td>39</td>
</tr>
<tr>
<td>ALGIERS</td>
<td>39</td>
</tr>
<tr>
<td>ABIDJAN</td>
<td>41</td>
</tr>
</tbody>
</table>

Online restaurants delivery are faster in Africa than 45 min on average.

CONSUMERS % BY GENDER

<table>
<thead>
<tr>
<th>Gender</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>MALE</td>
<td>51%</td>
</tr>
<tr>
<td>FEMALE</td>
<td>49%</td>
</tr>
</tbody>
</table>

Online food delivery is gender friendly!

*Q1 & Q2 2020
How has your partnership with online platforms like Jumia Food supported the growth of your business in general and during COVID-19 pandemic?

As convenience is becoming more and more the norm in everyday life, delivery continues to be a key focus point for our business, today and in the future. Aggregator partnerships are key in developing this sales layer. In the world we live in today, we have also seen advertising shift from the usual print and OOH media. Even though these are still important for any business, digital advertising is becoming the main focus for many. Aggregators like Jumia, do provide a great platform to execute digital strategies in addition to doing home deliveries. I believe growth will continue to come from delivery in the future, as the aggregators will eventually start gaining from economies of scale as this layer grows and that commercials to the partners will improve, resulting in more vendors signing up to do home delivery. COVID-19 has been a very tough time for almost all businesses, but I do believe there are some positives that we can take forward from these unprecedented times. We as a company have been focusing on delivery for the last 6 years and this enabled us at the time when COVID-19 started, to immediately activate contactless delivery and comply to the statutory requirements at the time. It definitely softened the hard blow that the pandemic dealt us. Jumia specifically have been instrumental in dealing with the respective Government agencies during the lockdown period to enable us and other food vendors to continue to trade even though our sit-down areas were closed.

What are the new consumer trends within the Food industry in Africa?

I believe that COVID 19 has fast tracked convenience in the food sector as people were forced to order from home during these times. I think the #1 changing trend is that consumers have become more safety conscious than ever before, both from a food and service perspective. The consumer expectation has been raised and they simply will not accept anything that is not prepared or delivered in a safe way. These areas have always been a focus for us as a company and I believe that this continuous focus has now really paid off during the pandemic as we have built trust over a period of time with our customers. Simply put - If you do not provide safe food in a safe environment, your business will not make it going forward.

Which tech innovations do you think will impact the local African Food scene in the next 3-5 years?

From a delivery perspective I do believe there will be a place in Africa for curbside delivery in the near future. Another interesting space to watch is the subscription model and how we as food vendors, can partner up with existing subscription models like Jumia Prime. In my opinion, the main focus over the last couple of years from a tech perspective for delivery, has been consumer facing with different ordering platforms and making the order process quick and simple. I am personally looking forward to seeing what the future brings in terms of actually delivering the products to the consumer, and how the average of 40 minutes to receive your order can be reduced and consistently completed within 15 minutes. This will have a large positive impact on the quality of food you receive when your order is delivered.
TOP CITIES IN AFRICA

1. Nairobi
2. Lagos
3. Casablanca
4. Kampala
5. Abidjan
6. Accra
7. Rabat
8. Abuja
9. Tunis
10. Algiers

Nairobi & Lagos are the leading cities, the demand is growing in the cities impacted by the lockdown such as Casablanca.

FOOD CATEGORY INDEX

<table>
<thead>
<tr>
<th>Category</th>
<th>2019</th>
<th>2020</th>
</tr>
</thead>
<tbody>
<tr>
<td>Restaurant</td>
<td>9€</td>
<td>10€</td>
</tr>
<tr>
<td>Beverage</td>
<td>19€</td>
<td>21€</td>
</tr>
<tr>
<td>Pharmacy</td>
<td>-€</td>
<td>19€</td>
</tr>
<tr>
<td>Groceries</td>
<td>13€</td>
<td>15€</td>
</tr>
</tbody>
</table>

Consumers spend more on groceries for their daily needs due mostly to the contactless delivery.

MOST POPULAR LOCAL RESTAURANTS

- Pepper
- O'Takkos
- Honey Suckle
- Pizza Inn
- Mig’s

More than 95% of the restaurants on Jumia Food are local brands.

PRICE FOR ESSENTIALS ON JUMIA

<table>
<thead>
<tr>
<th>Country</th>
<th>Rice 1kg</th>
<th>Flour 1kg</th>
</tr>
</thead>
<tbody>
<tr>
<td>UG</td>
<td>6.5 UGX</td>
<td>6.2 UGX</td>
</tr>
<tr>
<td>KE</td>
<td>57 KES</td>
<td>56 KES</td>
</tr>
<tr>
<td>IC</td>
<td>610 FCFA</td>
<td>575 FCFA</td>
</tr>
<tr>
<td>MO</td>
<td>12 MAD</td>
<td>11.8 MAD</td>
</tr>
<tr>
<td>NG</td>
<td>800 NGN</td>
<td>800 NGN</td>
</tr>
<tr>
<td>GH</td>
<td>8 GHS</td>
<td>30 GHS</td>
</tr>
</tbody>
</table>

Average prices for Rice and Sugar are mostly below 1 € in most of the countries, essentials remain expensive for Nigeria & Ghana.

MOST POPULAR INTERNATIONAL BRANDS

1. KFC
2. McDonald’s
3. Carrefour
4. Burger King
5. Pizza Hut

Well known Fast Food brands are leading in Africa.

*Q1 & Q2 2020
Why are Lagos and Nairobi the most vibrant cities for online food delivery? How can you explain the trends for Fast-food from the consumers?

Indeed, Lagos and Nairobi are two vibrant cities in terms of online food delivery. Both cities have a high influx of commercial activities, as major hubs in East and West Africa. As a result, consumers there tend to have a wider disposable income, which leads them to prefer the convenience of online food services, not to mention the convenience of mobile money. At the same time, the internet access in Africa is booming, as well as the adoption of smartphones. On the vendors side, there’s a mix between good local restaurants and fast-food brands in those two markets. Fast-food is becoming a major trend in the online food delivery business due to two key aspects: practicality and affordability.

How has Jumia Food supported the growth of local business in general? and during COVID-19 pandemic?

This pandemic crisis showed the world that online food delivery can be not just a commodity, but a necessity. The food business adapted quickly to this so-called new normal, namely with the adoption of contactless deliveries, cashless deliveries using JumiaPay, and by obliging to very strict safety measures during the end-to-end delivering process, such as the usage of masks, gloves, and sanitizers at the same time, Jumia started to provide vendors and restaurants with commission rebates in some of our markets and participating in discussions with local governments to support big, medium, and small businesses during this difficult time. In the end, a lot of individuals that have never previously purchased a single item online in their whole lives started to order their meals through the Jumia App and, as a result, our consumer base registered an enormous growth. Now, consumers look at a Jumia as a reliable alternative to stay safe and save money at the same time. They are aware that it’s a win-win situation for them.

What sort of trends have you noticed in the new services (Jumia Party, Supermarket Pharmacy) and retail grocery supply chain during the COVID-19 pandemic?

One of the biggest trends that derived from this pandemic crisis was an acceleration of the Supermarket category, followed by Jumia Party. Our consumers quickly realized that it was a lot better to have their groceries being delivered at their doorstep instead of leaving the safety of their houses to search for essential products and, thus, being exposed to the virus. However, every government is dealing with COVID-19 in their own way, so there are many different contexts. For example, Morocco registered a strong growth during the lockdown, and, as supply chains remained strong, businesses focused a lot on improving their internal processes for when the lockdown measures were lifted.
INTERNET PENETRATION
39.3%
est. 2020
527 M internet users in Africa
+12% growth since 2000

MOBILE SUBSCRIPTIONS
80%
2019
Expected to grow 3.7% by 2025.
81% penetration +5.6 YoY growth

DIGITAL PAYMENT
JumiaPay has accelerated the
digital payment solutions.

TOP MOBILE INTERNET COUNTRIES
% PENETRATION (2019)

<table>
<thead>
<tr>
<th>Country</th>
<th>Penetration</th>
</tr>
</thead>
<tbody>
<tr>
<td>KENYA</td>
<td>87.2%</td>
</tr>
<tr>
<td>TUNISIA</td>
<td>66.8%</td>
</tr>
<tr>
<td>MOROCCO</td>
<td>64.3%</td>
</tr>
<tr>
<td>NIGERIA</td>
<td>61.1%</td>
</tr>
<tr>
<td>ALGERIA</td>
<td>58.2%</td>
</tr>
</tbody>
</table>

Kenyans are the most connected in Africa.

SMARTPHONE ADOPTION IN AFRICA
2019 40%
2025 67%
Smartphones are booming accelerating
the Digital shift in Africa.

JUMIA FOOD TRAFFIC SOURCE
1. MOBILE 86%
2. DESKTOP 12%
Consumers largely place orders on
Jumia Food via their smartphones.

APP VS. MOBILE SITE
JUMIA FOOD APP 65%
MOBILE SITE 35%
Mobile friendly, Jumia Food app is
the most used by the consumers.
HASSEN BEN TAARIT
CHIEF COMMERCIAL OFFICER / AL JAZIRA OLIVE OIL

How did you come up with the idea of digitizing oils, and why did you choose Jumia?

Although AL JAZIRA preserves the techniques and traditions that characterize its activity for several years, our factory is modern and equipped with cutting edge technology. In this sense, we were trying to adapt to new innovations, and when Jumia agreed to work with us and we immediately became partners. For a company seeking entry into the world of online sales, one cannot think twice when it comes to working with Jumia which is the leading e-Commerce platform in Tunisia and Africa at large.

In what way Jumia changed Al Jazira?

Thanks to Jumia, Al Jazira oils is now accessible to all Tunisians. We have created a line at the factory exclusive to Jumia. The 3 litre bottles of olive oil is a success on Jumia, despite a lack of awareness in the Tunisian Market, which shows the impact of e-commerce on consumer habits and serves as an inspiration to continue working with Jumia.

How are your consumers welcoming the digitalization of your activity?

Our product is now accessible countrywide. We are happy to see hundreds of positive feedbacks from our online presence on Jumia. Also, good to note, Al Jazira Oils has become the no.1 product on Jumia in terms of orders placed.

http://www.oliveoiltunisia.com/en/index/
How has Jumia Food supported the growth of local business in general and during COVID-19 pandemic?

COVID-19 pandemic made it clear that Jumia Food’s service was not just a convenience but an essential service that bridged the gap for consumers between getting hot meals & food delivered to their homes while still staying safe and limiting physical contact. It was also a critical lifeline for many restaurants that might have been forced to go out of business when they could no longer operate. Jumia Food made it possible for them to shut down physical restaurant space but keep their kitchen open and serve consumers who order through Jumia Food app. Restaurants are small businesses and thus extremely vulnerable to non-systemic shocks like lockdowns and curfews that severely impact their operations. A large part of MSMEs in Africa are in the Food and Beverage sector thus they are a very important segment of the African economy and we are proud that Jumia Food supported them to stay in business during the pandemic. Jumia Food also partnered with groceries and supermarkets to leverage its platform in reaching consumers and grow their businesses.

How distribution channels like Jumia can help by supporting the objective of improving Food security in Africa?

Jumia’s mission of connecting consumers and sellers is anchored on solving distribution in Africa. We enable transactions between consumers and sellers, we provide a logistics network for sellers to get products delivered to consumers and we enable payment on our platform. This addresses several inefficiencies that exist today in the food value chain. By driving efficiencies at the last mile we are creating a good ripple effect upstream in food consolidation, aggregation and all the way into agriculture. As Jumia Food onboards more restaurants, more groceries and more market fresh food vendors as we are doing in countries such as Uganda, the costs we drive flows back in better planning, better resource allocation along the food value chain and hopefully leads to more food for more people in Africa.
VIDEOS

UNPD SUPPORT THE MARKET VENDORS

COVID-19 SAFETY FIRST

SUPPORT RESTAURANTS

SAVE MORE WITH JUMIA
AFRICA FOOD INDEX 2020

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United Nations Development Programme
Jumia Data 2020 - Q1 & Q2
GSMA
The World Factbook - CIA
World Bank
FAO
BCG
McKinsey & Company
Internet World Stats
World Health Organization

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STAY SAFE

#AfricaFoodIndex20
#SupportRestaurants