



# CASHEW MARKETING & CONSUMPTION IN WEST AFRICA

## PART 2. COUNTRY SUMMARIES: GUINEA-BISSAU

*West Africa Trade Hub Technical Report No. 22f*

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### **DISCLAIMER**

The author's views expressed in this publication do not necessarily reflect the views of the United States Agency for International Development or the United States Government.

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# ACRONYMS AND EQUIVALENCIES

<b>ACA</b>	African Cashew Alliance
<b>FCFA</b>	<i>Franc Communauté Financière Africaine</i> – currency used in 8 of the 10 countries studied
<b>g</b>	gram(s)
<b>GTZ</b>	<i>Deutsche Gesellschaft für Technische Zusammenarbeit</i> – a German development organization
<b>kg</b>	kilogram(s)
<b>MBA</b>	Masters of Business Administration
<b>MT</b>	metric ton
<b>NA</b>	not available
<b>NACC</b>	Nigerian American Chamber of Commerce
<b>NGO</b>	non-governmental organization
<b>PAMER</b>	<i>Projet d'Appui Aux Micro Entreprises Rurales</i> – a project funded by the International Fund for Agricultural Development
<b>PHCCIMA</b>	Port Harcourt Chamber of Commerce, Industry, Mines and Agriculture
<b>SNV</b>	<i>Stichting Nederlandse Vrijwilligers</i> – a Dutch development organization
<b>TIPCEE</b>	Trade and Investment Program for a Competitive Export Economy – a USAID/Ghana-funded project
<b>USAID</b>	United States Agency for International Development
<b>WA</b>	West Africa
<b>\$</b>	United States dollar

## Equivalencies:

1 kg = 2.2 pounds

1 MT = 1,000 kg

500 CFA = \$1.00 (U.S. dollar)

9,250 cedis = \$1.00 (U.S. dollar)

128 naira = \$1.00 (U.S. dollar)

# 1. STUDY OBJECTIVE AND METHODS

In addition to describing cashew kernel marketing and consumption in West Africa, this report aims to be a tool for cashew processors to increase their sales in the regional West African market. If international companies can sell their products on every street corner and realize substantial gains, African cashew processors should be able to do the same. Cashews are a healthy<sup>1</sup> and appreciated snack in the sub-region and can compete with other snacks such as potato chips or plantain chips.

Most cashew processors operating in West Africa target local markets. The international market is more demanding in terms of quality and shipment uniformity, and is subject to relatively larger price fluctuations.<sup>2</sup> Even as West African exports grow, the local market will remain an important outlet for export-oriented operations—especially for off-grade (broken) kernels—and a secure source of income.

To date, cashew consumption in local markets in West Africa has been marginal, especially compared to other cashew producing countries like India, where local markets played a critical role in the development of world-class, export-oriented sectors, even though India itself introduced cashews only 100 years ago (they are originally from Brazil). The 231.3 million West African consumers<sup>3</sup> can also become an important market for off-grades and secondary products, such as cashew cookies, other sweets, and cashew-based sauces.

The Trade Hub and the African Cashew Alliance (ACA) conducted this market study in 10 West African countries to assist processors in broadening cashew distribution, raising cashew awareness, and exploring regional opportunities. This study provides a snapshot of the current state of cashew processing, marketing, and consumption, highlighting best practices and opportunities for local processors in product development and market channels to increase sales.

The research resulted in the current summary document and ten individual country reports. **This individual country report should be read as an elaboration on the larger report.**

It is important to note that this study was done over a relatively short period (1-2 months) in multiple countries by different investigators, who were all trained to administer the same set of data collection instruments. We are confident that the study captured all of the formal cashew processors in each of the countries, as there are few of these and they are well-known. It did not likely capture all of the informal, small-scale cashew processors who shell and package cashew kernels for the domestic market of each country.

The period of the survey (hot season) may be one of lower cashew and nutmeat consumption, as salty snacks tend to induce thirst. Ideally, the survey would have been replicated once or twice during different periods of the year (rainy season, early dry season). The survey period was also well after the Muslim and Christian holiday periods of 2006.

Similarly, the consumer survey is limited in scope and sample size. As a purposive rather than random sample, it was designed to capture illustrative information about the cashew purchasing and consumption patterns of the types of consumers who frequent supermarkets and other formal retail establishments. These outlets were the focus of this study, because we believe that they have the greatest potential to increase sales in the region of West African cashews. These retail outlets are higher-volume sales points (rather than small kiosks or sellers) that are concentrated in larger cities, where there are more well-off consumers with higher disposable incomes, and where people are more likely to snack and eat food away

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<sup>1</sup> See the article at Newstarget “Cashews boost blood-pressure-regulating reflex.” (<http://www.newstarget.com/020005.html>)

<sup>2</sup> Cashew kernel prices can vary considerably from one year to another. The price of WW320s on April 1, 2005 was \$2.55, compared with \$1.98 on April 1, 2006. (Source: *Cashew Week*, March 24, 2007)

<sup>3</sup> Total population in the 10 researched countries according to the CIA World Fact Book. (<https://www.cia.gov/library/publications/the-world-factbook/>)

from home or on the run. As cashews are very expensive for West African consumers (at parity with cashews sold at retail in the U.S. or EU), they are a luxury good that tend to be bought by wealthier consumers or eaten in very small snack-size quantities

Given these methodological issues and caveats, we emphasize that the study results should be viewed as illustrative and representative, though not definitive or highly precise in any statistical sense. The authors believe that the results are robust-enough to draw programmatic conclusions about how to expand cashew consumption in the region. And the authors are convinced that expanding regional processing for the regional market is an important step toward improving quality and consistency that are required to compete effectively in the international marketplace. Furthermore, regionally based processors can use the domestic/regional market to build volume and scale, as well as find outlets for poorer grades and pieces of processed cashews. Building scale is critically important to becoming an exporter, where a minimum volume threshold must be attained to be viewed a credible supplier able to ship multiple containers per month.

We researched three levels of the cashew value chain, asking the following questions:

1. **Processors:** What is the processing capacity of each country? What kinds of cashews do local processors and roasters produce (which grades, which recipes)? Is the local production of processed cashews expected to increase or decrease?  
 Researchers interviewed local processors by phone and e-mail.
2. **Distribution channels:** Who buys, sells, or uses processed cashew nuts in West Africa? What kinds of products and packaging do they prefer? What are the various retail prices and margins of those distributors? What can be done to increase sales of processed cashew nuts?  
 In each country, field researchers used standardized questionnaires to interview 16–50 managers, shopkeepers, and food processors at supermarkets, hotels, gas stations, bakeries, and restaurants.
3. **Consumers:** Who consumes cashew nuts? What kinds of products are preferred by consumers? Where do people buy and eat cashew nuts? What can be done to increase their consumption?  
 In each country, field researchers interviewed people in supermarkets or hotel lobbies with standardized questionnaires and then gathered another 8–10 people to comment on various types of packaging and taste several types of cashew nuts to identify their preferences and perceptions in a consumer panel.  
 Note: The consumer study aims to give an indication of preferences, but does not necessarily give a representative view of common trends in the country due to the small number of people interviewed. Consumer preferences stated in this study should be interpreted in this context.

**Request questionnaires used in this study at [info@watradehub.com](mailto:info@watradehub.com).**

The following table summarizes the number of managers and consumers interviewed per country.

**Table 2. Retail market interviews held per country.**

	Benin	Burkina	Côte d'Ivoire	Gambia	Ghana	Guinea-Bissau	Mali	Nigeria	Senegal	Togo	Total
<b>Managers Interviewed</b>											
Supermarkets	14	9	7	4	8	3	9	10	8	6	<b>78</b>
Roadside shops	3	15	5	2	17	1	11	3	10	3	<b>70</b>
Airport shops	1				1	1	1	1	2		<b>7</b>
Airlines		3						2			<b>5</b>
Hotels	7	9	9	4	8	2	12	6	8	3	<b>68</b>
Restaurants	2	7	5	2	6	2	7	4	4		<b>39</b>
Service stations	1	5	3	2	10	1	4	2	4		<b>32</b>
Food processors & bakeries	5	8	11	3	2	2	7	4	5		<b>47</b>
Wholesalers				2							<b>2</b>
Pharmacies					1						<b>1</b>
<b>Consumers Interviewed</b>											
Surveyed*	22	30	26	44	44	25	28	50	25	20	<b>314</b>
Consumer panel	13	8	9		13	9	10	10	8		<b>80</b>
<b>Total Number of People Interviewed</b>											
Total Interviewed	68	94	75	63	110	46	89	92	74	32	<b>743</b>

\* in supermarkets & hotels

The Trade Hub and ACA coordinated the study in Accra. Partner organizations carried out field research, focusing on main consumption centers (main urban areas and expatriates/tourist destinations). Table 3 lists the location and dates of interviews and the partner organization facilitating the research.

**Table 3. Countries studied and field research information.**

Country	Places Visited	Study Facilitator	Dates of 2007 field research
<b>Benin</b>	Cotonou, Natitingou, Bohicon	Peace Corps Benin	March 8-20
<b>Burkina Faso</b>	Ouagadougou, Bobo Dioulasso	PAMER Project	March 25-April 12
<b>Côte d'Ivoire</b>	Abidjan	Olam with financing from GTZ and ACA	March 13-25
<b>The Gambia</b>	Banjul, Serrekunda	Comafrique	April 5-15
<b>Ghana</b>	Accra, Kumasi, Cape Coast	TIPCEE	March 1-25
<b>Guinea-Bissau</b>	Bissau	SNV	March 14-25
<b>Mali</b>	Bamako, Segou, Mopti	Projet Cadre Intégré	March 5-30
<b>Nigeria</b>	Port Harcourt, Lagos	PHCCIMA and NACC	Port Harcourt: Mar 12-30 Lagos: April 4-15
<b>Senegal</b>	Dakar, Saint Louis, Ziguinchor	West Africa Trade Hub/Dakar	March 3-25
<b>Togo</b>	Lomé	Peace Corps Benin	March 21-25

# GUINEA-BISSAU

## Explore Export Markets in The Gambia and North Africa

## 2. COUNTRY DESCRIPTION

- Total population: 1.4 million inhabitants
- GDP per capita: \$900
- Urban population: 35%
- Capital city: Bissau (population 200,000)
- Number of expatriates: 1,500–2,000
- Number of tourists/year: 5,725 in 2006
- Main tourist destinations:
  - Former combatants are now returning with friends and family to see old friends and places they used to live. They start in Bissau and then go to Gabu and Bafata (in the east) or to Buba (in the south).
  - The Bijagós Archipelago offers beautiful landscapes, diverse animals (marine hippopotamus, several species of turtles, crocodiles, birds, sharks, and dolphins), and deep-sea fishing.
  - Some tourists come to hunt: The Boé sector in the east, Buba in the south, and Uaque (20 km from Bissau) are the main spots for hunting wild pigs, gazelles, and many birds.



## 3. MARKET OVERVIEW

### 3.1 Local Processing Capacities

The Guinean cashew processing sector includes several medium-sized processing factories and a number of smaller units.

- AgriBissau (Bissau), with a capacity of **1,000 MT** of raw nuts, exports nearly all production but they are currently not in operation.
- B and B Caju (Bissau), with a capacity of **500 MT** of raw nuts, exports nearly all production.
- Djonde Lda. (Bissau), with a capacity of **250 MT** of raw nuts, produced 100 MT last year, 95% of which was sold on the local market. The remaining 5% was exported to Senegal and The Gambia. Djonde Lda produces salted, spicy (piri-piri), and plain kernels for the retail market.
- Enterprise Works/USAID is reported to have established a network of 21 small processing plants with a combined capacity of 780 MT of raw nuts a year, most of which is sold on the local market. It is unclear how many of these factories are currently operational.
- Licaju (Bissau), with a capacity of **1,000 MT** of raw nuts, exports nearly all production.
- Sicaju (Bissau), with a capacity of **1,000 MT** of raw nuts, exports nearly all production.
- **Estimated total capacity: 4,080 MT of raw cashew nuts per year.**

Actual production figures for 2006 and 2007 were not available, as only one plant could be contacted directly. Information on other plants came from a recent study by Guinea-Bissau's Ministry of the Economy.<sup>4</sup>

<sup>4</sup> *Ministerio da Economia Republica da Guine-Bissau, Guinea Bissau: Development of the Cashew Study, 2006*

## 3.2 Snack Market

Snack items commonly sold in Guinea-Bissau

	Average Price/kilo*	Common Items	Average Retail Price
<b>Cashews</b>	\$12.16	Plastic sachet (400 g) Plastic sachet (150 g)	\$3.00 \$2.00
<b>Peanuts</b>	Estimated to be 1/3 the price of cashews in periodic markets	Sold in supermarkets Sold in small sachets in the street	\$0.40-1.00
<b>Potato Chips</b>	\$20.58	Pringles tube (170 g)	\$3.50

\*For the purposes of this study, \$1.00 = 500 CFA.

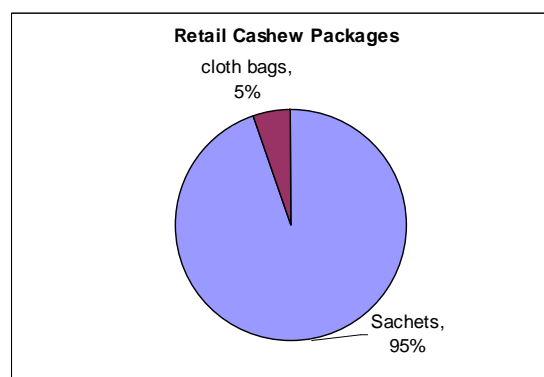
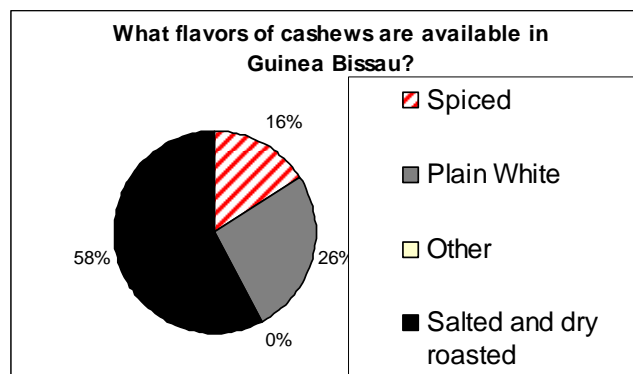
**Cashew nuts are a luxury snack food.** Their price compares favorably with another luxury snack food, imported potato chips. This is particularly true when one considers the low cost of cashews in traditional markets—as little as 1,000 CFA/kilo. But even so, cashews are still a luxury product, consumed in small quantities by the local population. Peanuts remain less than a third of the cost of cashews. Concrete information on comparative sales volumes was not available, as stores do not track this information.

**Snack Consumption.** Consumers interviewed during the survey reported having consumed the following snacks: mixed nuts (96%), potato chips (76%), and peanuts.

## 4. DISTRIBUTION ANALYSIS

### 4.1 General Overview

- Raw cashew nuts are Guinea-Bissau's largest export, and **low quality plain cashews are common and cheap in traditional markets: \$2/kilo.**
  - **The formal market for cashew products remains underdeveloped.**
  - Low incomes, price competition from traditional markets, and a lack of information on the health benefits of cashews limit expansion of higher value products.
  - Cashews are also **poorly distributed by local processors:** "few shops sell these products."
- ➔ **Packaging requires improvement: retailers request "more attractive/colorful and resistant plastic" packages.**
- ➔ Closer working relations with distributors will allow processors to improve mastery of the limited local market.



## 4.2 Supermarket Channel

Key Facts: Supermarkets (3 interviewed)	
Percent selling cashews	100%
Percent selling broken cashews	67%
Most common cashew products	Salted cashews (50%), plain cashews (50%)
Most common pack sizes	150 g (most common), 400 g
Average retail price per item	\$2.42
Average retail price per kg	\$10.84
Average retail margin	26%
Average monthly cashew sales	\$346.00

- **High-end supermarkets** in the capital are an important market for local processors.
- However, there are **problems with distribution**:
  - 67% percent of supermarket managers said they occasionally ran out of stock.
  - 33% said they occasionally returned products due to quality problems.
- **Limitations to increased market**:
  - Lack of advertising on health benefits of cashews (100%)
  - Poor packaging (67%)
  - High price (33%)
- **Terms of payment**:
  - Cash (40%)
  - Consignment (40%)
  - Credit (20%)
- **Main suppliers**:
  - Djonde lda (Sabor Tropical)
  - Other minor processors

➔ *Invest in improved packaging, such as plastic jars, to improve appearance and reduce breakage.*

➔ *Improve quality control in processing and check regularly if supermarkets need additional stock.*

## 4.3 Stands &amp; Small Shops

Key Facts – Stands and Small Shops	
Percent selling cashews	100% (of 2 shops visited)
Percent selling broken cashews	50%
Most common cashew products	Salted (50%), spiced (33%), plain (17%)
Most common pack sizes	150 g sachets (most common), 400 g sachets
Average retail price	\$2.26
Price per kg	\$13.25
Estimated monthly volume/establishment	\$505.50
Retail margins	26%

- Small shops and service stations targeting high income local consumers sell **large quantities of cashews**.
- 50% of shops occasionally run out of product.
- **Limitations to increased market**:
  - Mixed product quality
  - Fragile, unattractive packaging

- Price is not a problem for this channel even though prices are higher than at supermarket.
- Small market—only a few such shops in the entire country.

#### 4.4 Luxury Hotels

Hotels	
Percent using cashews	50%
Percent using broken cashews	50%
Estimated monthly volume/establishment	60 kg
Common packs	50 g sachets (for sale), 1 kg sachets (cooking and free snacks)
Preferred cashew products	Salted whole & broken kernels (67%), Plain broken kernels (33%)
Source	<b>Local processing companies</b>
Margins on sold cashews	50%

- Small but profitable market:
  - Small, high-quality packages are for sale in the mini-bars in guest rooms.
  - Low-cost broken kernels are used in cooking and at the bar.
- Limitations to expanded use:
  - Unappealing, fragile packages
  - High prices
- Small market—only a few such shops in the country

➔ *Opportunity: hotels expressed an interest in low-cost differentiated packages (with hotel name/logo) for sale in mini-bars.*

## 5. CONSUMER PREFERENCES & HABITS

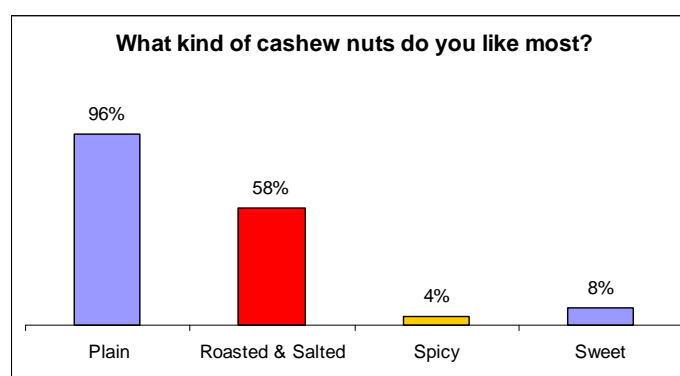
### 5.1 Consumption Habits

Every person interviewed knew what a cashew nut was, and 96% of them have eaten cashews.

- Cashew nuts are an established product in Guinea-Bissau, known and eaten by almost everybody.

Type of cashews most commonly consumed:

- Plain nuts are the most regularly consumed and liked by those who were interviewed.
- Secondary products:
  - 67% of people interviewed had eaten cashew cookies, and all liked them.
  - Very few people had eaten caramelized cashews, but those who had, liked them.
- Assorted nuts are also popular products.



- Almost all participants in the group interview said they would buy broken kernels if they were cheaper.

**Consumption frequency:**

- 88% of interviewees who had eaten cashews eat them **at least once a month**; 30% eat cashews **at least once a week**.

**Consumption settings:**

- Most interviewees eat cashews as a snack, mostly at home, as an “*aperitif*”.
- 67% of consumers interviewed eat cashew-based meals.
- **Transportation:** a large majority of people interviewed (75%) eat cashews while they are traveling.
- Among interviewees, none of them eats cashews in bars.

**Seasonal consumption:**

- Cashews are often consumed for special occasions: 46% of people interviewed eat cashews during **Ramadan**, 50% for **anniversaries**, 42% for **weddings**, and 33% during the **end-of-year holiday season**.

➔ *Develop more cashew-based products since they are appreciated by consumers (e.g., cashew cookies, caramelized cashews, etc.).*

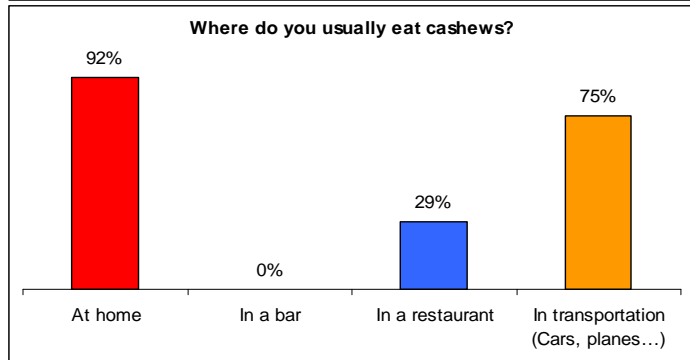
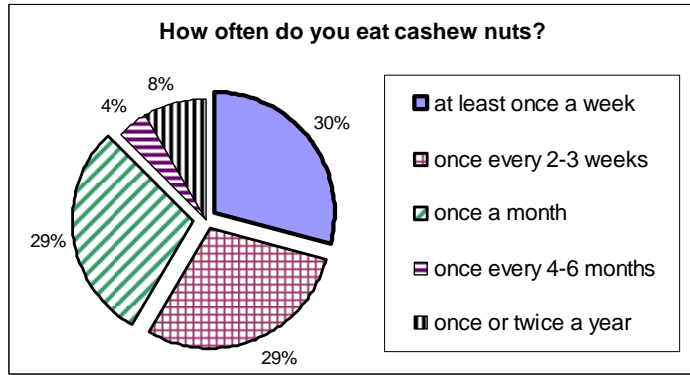
➔ *Explore new distribution channels, such as bars.*

➔ *Create special promotions for specific occasions, including adapted packaging for holidays, anniversaries, or weddings.*

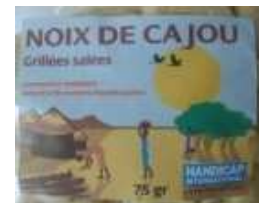
➔ *Sort off-grade nuts to sell high-quality packaged broken kernels.*

**Perception of the products:**

- All people interviewed knew where cashews are produced, and they all seem very sensitive to the **African origin of the products**.
- Cashews are most often described as **expensive** and **tasty**.
- Cashew nuts were seen as a healthy product by most of the participants in the group interview.



**There is little variety in retail packaging in Guinea-Bissau in spite of a broad range of cashew flavors.**

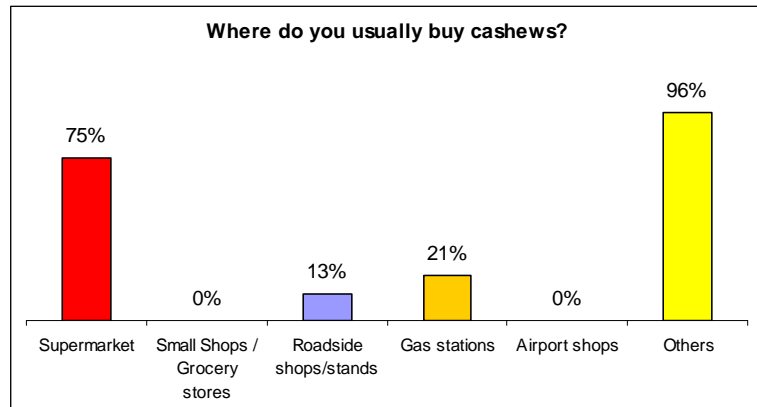


**Label with “African design”**

## 5.2 Purchase Habits

Where do people buy cashews?

- **Streets markets are the most common distribution channels in Bissau:** People buy unbranded nuts without added flavors, at an average price of 1,000 CFA/kg. This is represented in the “Others” column in the graph to the right.
- **Supermarkets** are the other major outlet for processed cashews.



## 5.3 Product Preferences

**Packaging:**

- **Transparent:** Consumers want to see the products.
- **Clean:** Material (especially plastic) must be chosen carefully, as consumers do not like to buy nuts that look dirty.
- **Attractive and colorful labels:** Well-designed labels will attract consumers. Lots of people interviewed were sensitive to the information on the packs: local origin, details about the products, etc...
- **Good conservation** is a key element, especially for bigger packs (preferably solid jars).



*Cashew nuts shelf in a Supermarket in Bissau*

➔ ***Packaging material must be clean and either fully or partly transparent.***

➔ ***Good conservation of nuts is key: packs (jars, sachets) should be resealable for the next use.***

➔ ***Labels should be colorful and indicate the African identity of the products.***

**Flavor:**

- Consumers in Bissau are not accustomed to eating a lot of different flavors of cashew nuts.
- **Roasted and salted cashews are the most favored.**
- **Openness to new flavors:** 6 of 9 participants in the group interview were positively surprised by peppered nuts and would be likely to buy them, while only 3 participants would buy the spicy nuts.

**Price:**

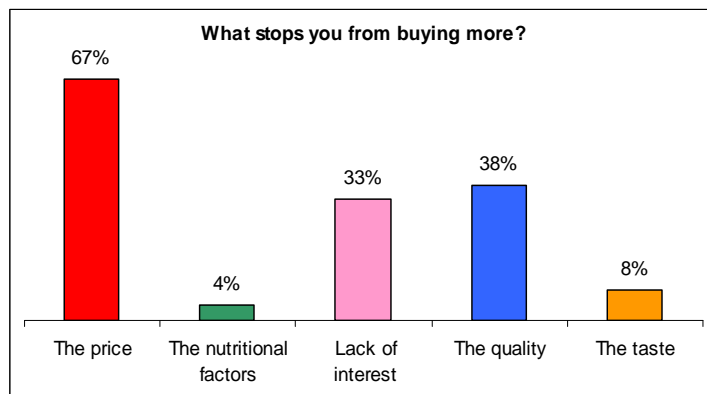
- Cashew nuts are perceived as expensive products relative to the low average income per capita. People interviewed said that they were likely to pay, on average, the following prices for cashews:
  - **\$8.92 per kg** (4,400 CFA) in plastic sachets (75 g)
  - **\$13.90 per kg** (6,850 CFA) in aluminum sachets (125 g)
  - **Up to \$15.08 per kg** (7,400 CFA) in plastic jars (210 g)

➔ ***Develop new flavors for cashew nuts, such as peppered nuts.***

- ➔ *Additional value can be created by improving the quality of the packs; strong and attractive aluminum sachets or plastic jars may appeal to high-end consumers.*

## 5.4 What Prevents People from Buying More?

- Price remains the main constraint to consumption.
- Quality is also an important issue: almost 40% of people interviewed would buy more cashews if the quality was better.
- Nobody in the group interviewed declared having difficulty finding cashews, but 88% of them would like to find cashews in places where they are not sold, including the airport, nightclubs, and more shops and supermarkets.



- ➔ *Improve quality of processed cashews.*
- ➔ *Explore new distribution channels such as nightclubs and airports.*

## 6. CROSS-REGIONAL OPPORTUNITIES

- Guinea-Bissau's informal cottage processors produce the cheapest cashews encountered in this study (\$2.00/kg). Numerous small-scale formal processors are also quite competitive.
- This may be a temporarily reduced price, linked to the low price of raw cashew nuts after the collapse of the export market in Guinea-Bissau in 2006: Last years' raw cashew nuts are currently trading at \$0.10/kilo.
- Guinea-Bissau is very competitive as a supplier of bulk white kernels to roasters in Senegal and The Gambia.
- Traders or an association able to collect the production of small-scale processors and assure stable quality—a problem in Guinea-Bissau—would be well-positioned to take advantage of this opportunity in the regional market.
- Retail packages of Guinean cashews, in spite of mixed quality and poor packaging, would also be competitive in The Gambia and Senegal due to low prices (supermarket retail prices 40% less than in Senegal).
- Guinea-Bissau is the only Portuguese-speaking country in the region. Bissau's harbor is difficult to access.



*Guinea-Bissau has the potential to export cashew kernels to the whole region (several processors, good quality, low prices) but transportation and language may be significant constraints.*

## 6. CONTACTS

GUINEA BISSAU - Directory: Firms that buy processed cashews in Guinea Bissau										
Name	Type of business	products needed	Contact's name	Position	Address	City	Country	Phone number	E-mail	Fax
<b>Bodem</b>	Supermarket	whole kernels, different flavours	Mamadou Darame	shop director	Rua Vitorino Costa (Prédio Ancor) c.p. 577	Bissau	Guinea Bissau	00 245 20 48 62	N/A	N/A
<b>Bissau Palace</b>	Hotel	personalized packing of whole kernels with different flavours	Orlandino Falcão	vice-director. Responsible for F&B	Av. 14 de Novembro c.p. 372 Plack	Bissau	Guinea Bissau	00 245 25 62 60	falcao@bissaupalacehotel.com	N/A
<b>Lenox</b>	gas station	whole and broken kernels, salted and spicy	Sergio Gomes	Manager	Airport road	Bissau	Guinea Bissau	00 245 723 11 22 / 00 245 661 30 00	N/A	N/A
<b>Nur dym</b>	small shop	whole and broken kernels, salted and spicy	Shek	manager	Esquina Rua Vitorino Costa com Estrada de Santa Luzia	Bissau	Guinea Bissau	00 245 20 68 87	N/A	N/A
<b>Bom bias</b>	airport shop	whole and broken kernels with different flavours and with luxury packaging	Maria do Rosário da Fátima Oliveira de Velho	Owner	airport	Bissau	Guinea Bissau	00 245 665 84 53	N/A	N/A
<b>Pensao Central</b>	Restaurant and motel	whole kernels with different flavours	Berta Bento	Owner	Av. Amilcar Cabral C.p. 213	Bissau	Guinea Bissau	00 245 21 32 60	N/A	N/A