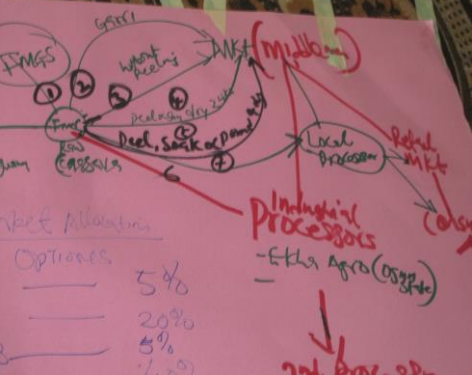
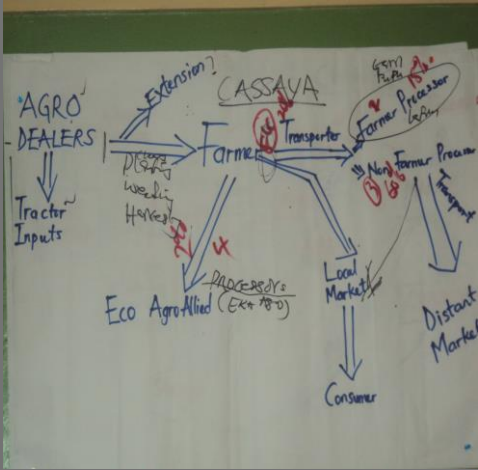
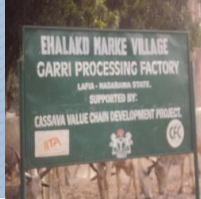


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Draft Report on Market Research and Private Sector Mapping

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1.0 EXECUTIVE SUMMARY

Africans depend on small-scale farming systems as the primary source of their livelihoods.

Yet they are marginalized and often do not produce enough to enable their families to have sufficient food to eat throughout the year. Smallholder farmers are also particularly vulnerable to climatic and economic shocks. Despite these challenges, the agriculture sector has been neglected by national governments and international donors over a sustained period. While development aid to Africa has increased by 250 per cent since the early 1980s, the allocation to agriculture has halved.

An international consensus has emerged that more and better aid and political support is needed to revitalize agricultural livelihoods in Africa; small-scale farming systems must be prioritised, along with smallholder farmers' ability to access local and international markets. In addition, there is a growing awareness that women smallholder farmers face particular constraints and need special support.

It is in realization of the above that, Oxfam GB, an international organisation which has been involved development programming in Nigeria for over a decade commissioned the study on "market research and private sector mapping". The main objective of the study was to identify gap, bottlenecks and opportunities associated with agricultural value chains in relation to small holder farmers. The outcome of the study will assist a key work streams within Oxfam GB's private sector and livelihood strategy to increase investments in sustainable smallholders agriculture particularly for women.

Our findings show that smallholder farmers are faced by various productions, marketing and processing challenges. Farmers and stakeholders reported the constraints of market access as a number one factor affecting production and marketing of cassava in the study states. Poor market access by smallholder farmers is caused by a combination of factors ranging from cost of transportation, poor road network, lack of market information, fluctuating prices, activity of middlemen, lack of standard measure, limited access to credit etc. The findings show a great similarity between production and marketing constraints affecting the two commodity crops- maize and cassava.

Some cassava- subsector findings includes: characteristically low yield the participating states. Processing is mostly at primary level- garri, lafun, chips and flour. Poor linkage to industrial processors. A decreasing number of cassava farmers due to past loss of revenue from glut and market failure, high cost of transportation inhibiting linkage to industrial processors etc.

In the maize subsector, yield were observed to be below the national average of 1.5ton/ha. The effect of poor/ ineffective extension services is visible as farmer's still use poor yielding variety and not aware of striga, stem borers and disease resistant varieties.

High cost of fertilizer has resulted in little or no use of fertilizers by farmers. There is no poor linkage to processors. Poor storage and inefficient marketing systems results in huge post harvest losses. At the yield rate of 1.5ton/ha and annual production of 8,000,000ton there is a supply deficit of 8,000,000 tons annually. This requires an increase of yield level of between 3 and 4 tons/ha to achieve.

Although, there is a general consensus that organizing small holders into effective groups is a major step to finding solution to the problem facing small holders; when viewed from the stand point that the more than a decade old glamour for group formation in much of sub Sahara Africa is yet to achieve its objective, it shows there is an urgent need to straighten the capacity of farmer groups, cooperatives and association to deliver if the level of competitiveness required in the agricultural sub sectors is to be achieved.

Processing has been identified as a major entry point for improving the livelihood of smallholder farmers especially women. This can be achieved by promoting primary and secondary processing across production cells through an effective partnership between farmers association, fabricators and processors in a platform to be driven by NGO

The contact between small holders and private sector key players was observed to be mostly indirect through middle men. This accounts for as high as 55%, whereas direct contacts accounts for only 20%. In the same vein, the private sector key players appear to have more business relationship with the large scale and medium scale farmers (70%) compare with 25% with small scale farmers. The study recommends strategy to promote partnership between private sector key players and the small holder farmers.

There is a space to improve small holder competitiveness by linking item with private sector key players economics of scale could be leveraged to straighten the production and organizational capabilities of small producers. The government can promote a positive environment for economic inclusion through specific policies.

1.1 INTRODUCTION

The agricultural sector provides employment for about 60 percent of the labour force and raw materials for industrial development. Its provision of food for the growing population and income for millions of smallholders is remarkable for the maintenance of peace in the country.

Nonetheless, the performance of the sector over the years is far below expectation because development efforts have failed to place it as the foundation for economic growth and development; thus it has not witnessed the desired transformation and the available resource endowment has been grossly underutilized. Its role in terms of foreign exchange and revenue generation that used to be prominent in the 1960s has been relegated to the background while attention is shifted to the development and export of crude oil. Up to the mid-1960s, Nigeria commanded a share in world agricultural exports of more than one percent and had a leading position for several of its export crops.

Nigeria supplied more than half of all traded palm kernel, more than a third of all groundnuts, and more than a fifth of all palm oil. As the country shifted towards petroleum exploitation and export agricultural exports declined and by the mid-1980s, Nigeria's world market share for agricultural products had dwindled to less than 0.1 percent. Today none of the country's export crops, with the exception of cocoa, commands any significant world market share. With the increasing need to eradicate poverty and put an end to hunger and malnutrition as enshrined in the MDG targets, Nigeria and indeed many African countries are returning to the agricultural sector for possible solution. In Nigeria, various development approaches have been adopted – the market has been relied upon, the government has been directly involved; yet there remains chronic under-investment in the sector and the efforts have not been able to fully unlock the available potentials.

Smallholder maize and cassava production in developing countries is stymied by technological, biophysical, and socioeconomic constraints. Future productivity growth to meet the growing demands for maize and cassava will require holistic approaches that address market, policy, and institutional constraints, near-term and longer-term food price development. Numerous socioeconomic factors impair smallholder farmer adoption of productivity-enhancing technologies, including limited access to information, seeds, other inputs, equipment, services, or markets for selling surplus produce (Pingali 2001; Morris et al. 2003; Langyintuo et al. 2010)

A key work stream within Oxfam GB's private sector and livelihoods strategies is to increase investments in sustainable smallholder agriculture, particularly for women. This initiative is meant to enhance value chain development of major crops towards improving the incomes of rural farmers and facilitating their contribution in modern supply chains.

It is In view of the above, that OGB commissioned a study on agricultural commodity value chains development in Nigeria. The aim of the study was to identify the gaps, bottlenecks and opportunities associated with agricultural value chains in relation to small holder farmers. The task also included a mapping of private sector main players that can potentially partner with small holder farmers' associations towards mutually beneficial agricultural value chain development. The objectives of the study were to:

- Provide exhaustive mapping of private sector players critical to agric value chain development for SHF
- Assess the opportunities & challenges confronting the private sector players in relating with small scale farm holders
- A critical examination of the agric value chain gaps, bottleneck and opportunities
- Identify and document challenges faced by small scale women farmers in accessing markets for their produce.
- Identifying of main 'entry points' for women farmers in modern agric value chain development
- Suggest business model(s) for SHF association / private sector player partnership

Data for the field the analysis came mainly from relevant literature and a 3 day rapid field appraisal of 4 participating states of Oyo, Nassarawa, Benue and Plateau. Stakeholders in the state during focused group discussion and interview sessions described the value chain of cassava and maize in relation to their individual states. Selected number of private sector key players for both commodity crops were visited as outcome of the private sector mapping in each state. This includes, input suppliers, processors and fabricators, bankers, transporters etc.

A few companies involved in industrial processing , transportation and agricultural financing were visited around Ogun State/ Lagos axis to gather useful information relating to partnership with small holders farmers.

1.2 STUDY OBJECTIVES

- To ascertain production and marketing pattern/trend of cassava in selected states
- Facilitate the mapping of private sector players critical to commodity value chain development
- Outline value chain gaps, bottleneck and opportunities
- To identify and document challenges faced by small scale women farmers in accessing markets.
- To assess the opportunities and challenges confronting the private sector players in relating with small scale farm holders
- Outline strategy for partnership between small holder farmers and private sector players.

1.3. STUDY METHODOLOGY

A cassava and maize sub-sector analyses was carried out through a review of existing documents and surveys. The survey, involved a multi-method rapid field assessment which was carried out for 3 days in each selected State. A sub-sector is understood as a vertical chain in the commodity flow from input supply through to consumption showing all stages and agents. It shows the links between producers and consumers through the processes of buying, storing, transporting, processing and selling the commodity. Sub-sector analysis was carried out to identify initial technical, institutional, socioeconomic and policy opportunities and constraints and to enable the introduction of technologies, which will improve cassava and maize production, processing and marketing.

The study addressed the structure, conduct and performance of the cassava and maize sub-sector. Data was collected in three stages: first, wherever available, published data was used to establish the structure, conduct and performance of the cassava and maize sub-sectors. Second, a rapid field appraisal survey was conducted using focused group interviews and key informants to obtain information on trading patterns, transportation facilities, processing and marketing systems in rural and urban areas.

Participants at the focused group discussion sessions were engaged in the private sector mapping process by listing private sector key players involved at different stages of cassava and maize chain. A selected list of major participants along the marketing channel and agro-business entrepreneurs were then visited.

Finally, the findings were presented and discussed with a group of stakeholders. During a 2 day workshop and their feedback was solicited.

1.4 STUDY AREA

The study was carried out in four states of the federation where maize and cassava are produced in large quantity. These states include: Oyo State, Nassarawa State, Benue State and Plateau State.

The choice of the state was purposive to building on existing synergies of past related projects/study conducted by Oxfam GB partners and network. In this regard, the consultant worked in close consultation with the following Oxfam GB partners across the study area.

Oyo State

- The Justice and Peace Development Commission (JDPC) Bashorun/Ibadan.

Nassarawa State

- Young Men Christian Association (YMCA) YMCA MADA HILLS-Lafia

Plateau State

- COCIN Community Development Project (CCDP), Panyam

Benue State

-
- Women in Agriculture Association

1.5 STUDY LIMITATIONS

Data for the analysis came mainly from relevant literature and a 3 day rapid field survey of stakeholders in the four Participating states which allowed only qualitative analysis of the value chain.

This study did not involve the economics of cassava and maize production, Processing Policy Structure (and profitability) of value adding enterprises, marketing system and prices in relation to domestic industrial utilization of maize and cassava and to exportation (including calculations of shipment values).

PIX

2.0 VALUE CHAIN ANALYSIS BASED ON FINDINGS

2.1. CASSAVA VALUE CHAIN

(A) Impediments to Growth in the Cassava Industry

There are production processing and marketing constraints in the cassava industry. The cost of hiring labor and the tedium encountered in manual cultivation particularly during land preparation with local implements seem to discourage investment in cassava production. With regard to processing, equipment are generally not easily available, and when available, they are usually inefficient, their parts wear down easily, while the public power supply is very unreliable forcing the processors to depend on the expensive alternative of using power generators in the face of ever escalating cost of fuel for the generators. As regards marketing, unattractive prices of products remain a serious problem. A situation where the cost of transportation due to poor state of the access roads, cost of fuel etc are added to the cost of production make the prices offered for the cassava tubers and processed products like garri and flour unattractive

(B) Cassava Production and Cropping System

Cassava production in Nigeria is largely in the hands of smallholders who operate about 87 percent of the total land area cultivated to the crop. The medium holding farms constitute about 10 percent, while the large-scale farms make up the remaining 3 percent. Cassava can be grown almost in all the states either as a sole crop or an intercrop with principal staples, such as maize, yam, cocoyam, sweet potato, rice, sorghum, millet; and subsidiary crops, such as beans, okro and leafy vegetables. Cassava can also be grown with oil palm, rubber, cashew and cocoa within the first few years of the permanent crop before the canopy covers. In most of the southern areas of Nigeria, farmers grow cassava in mixtures with maize, cocoyam, yam and vegetables but some grow it sole. In northern areas, sole cropping is more common (Unamma *et al.*, 1985, Okoli and Nnodu, 1996). A recent survey in the country indicates that on the average, for all the crops, about 25 percent of the fields are sole cropped and 75 percent are intercropped (RMDRC, 2004). Cassava is grown in areas where rainfall is greater than 100 mm, and accounts for over 70 percent of the total production of the tuber crop in West Africa.

Table 2.1 shows Cassava production across the six geopolitical zone of the country between 1999 and 2004. The figures shows a steady increase across the years particular in the southern zone where a lot of This achievement has been attributed to the improved high yielding, pest and disease resistant cassava varieties produced and released to farmers through research collaboration of IITA, Ibadan and the National Root Crops Research Institute (NRCRI), Umudike

Table 2.1 : Cassava production in Nigeria, 1999 – 2004

	1999	2000	2001	2002	2003	2004
NORTHWEST						
-Area ('000Ha)	211.54	209.734	211.61	215.80	21.69	217.05
-Output ('000MT)	1906.13	1865.46	1895.54	1990.00	1990.00	2004.95
-Share of Total (%)	6.65	7.08	6.89	7.13	7.84	7.06
-Yield (MT/Ha)	9.03	8.92	8.98	9.25	9.25	9.23
NORTHEAST						
-Area ('000Ha)	21.47	20.81	18.59	18.32	18.573	227.15
-Output ('000MT)	179.9	165.34	141.53	140.28	147.28	1929.57
-Share of Total (%)	0.63	0.63	0.51	0.50	0.58	6.80
-Yield (MT/Ha)	8.52	8.25	7.83	7.77	8.16	8.49
SOUTHWEST						
-Area ('000Ha)	442.82	382.54	421.19	444.3	449.4	456.41
-Output ('000MT)	5846.32	4993.38	5663.61	5883.81	6055.37	6356.58
-Share of Total (%)	20.39	18.95	20.59	21.07	23.86	22.40
-Yield (MT/Ha)	13.22	13.07	13.45	13.25	13.48	13.93
SOUTHEAST						
-Area ('000Ha)	471.94	432.51	448.61	456.04	468.74	499.89
-Output ('000MT)	5852.19	5384.13	5542.41	5846.31	6024.6	6317.11
-Share of Total (%)	20.41	20.43	20.14	20.93	23.74	22.26
-Yield (MT/Ha)	12.42	12.46	12.37	12.82	12.87	12.65
SOUTH SOUTH						
-Area ('000Ha)	607.98	605.804	609.75	600.23	603.54	587.29
-Output ('000MT)	6609.29	6268.11	6533.94	6321.67	3302.69	6430.44
-Share of Total (%)	23.05	23.78	23.75	22.64	13.01	22.66
-Yield (MT/Ha)	10.99	10.33	10.72	10.53	5.47	10.95
ALL ZONES						
-Area ('000Ha)	2420.90	2254.80	2285.70	2309.60	2336.10	2571.80
-Output ('000MT)	28679.10	26356.70	27512.80	27927.90	25381.80	28382.50

Source: Underlying data from the Project Coordinating Unit of the Federal Ministry of Agriculture and Rural Development, Abuja

Farmers across the states visited reported that 2004/2005 was a bad year(s) for cassava farmers as the huge increase in production in anticipation of the cassava chips and flour export ended as a national disaster. Farmers allegedly used tubers of cassava as fuel wood for months due to the glut. This singular experience is believed to have brought about a drastic reduction in total area under cultivation due to the refusal of farmers not to grow the crop again.

Cassava production is still faced with a number of constraints in all the states visited. Table 2.2 present a summary of constraints facing cassava production in the study area.

Table 2.2: Cassava Production Constraints

Production Constraints	RANK
Poor quality/quantity of cutting	4
Lack of market availability	1
Climate change	
Lack of credit facility	2
Lack of processing equipments	
Lack of storage facilities	
Flood	
Poor road network	
High cost of machines	
Lack of extension services	5
Animal destruction	
High cost of fertilizers	3
High cost of input	

The stakeholders made up mainly of small holder farmers in the study areas and selected NGOs participated in the FGD where the above constraints were listed. When asked to identify 5 most outstanding constraints from the list, market availability was mentioned as the number one problem facing cassava production. Market availability does not appear as a direct production concern, farmers explain that the mere thought of the possibility of not finding market for produce at the end of the production season is a concern that has led to decrease in area under cultivation and in some case a significant reduction in the number of farmers growing the crop.

The author observed a sharp drop of price per ton of cassava chips in plateau state during the study. A ton of chips which was sold for N30,000 dropped to N20,000 within a week. .

Cassava Farmers who come from far and near places including Nasarawa and Taraba States lamented their fate and counted their instant losses. Another related problem recounted by farmers was the rationale for issuance of 7 day LPO for which defaulters are penalised when payments for supply of chips is made minimum of one month after delivery. There was also a scene during the study of a woman - small scale farmer pleading for her cassava tubers to be bought by a large scale farmer/middleman to meet her pressing needs. This recurring issue poor market access and marketing related constraints' is depleting by the day the population of cassava growers across the states.

© Cassava Market Structure

Great imbalances continue to exist between the demand and supply of cassava in Nigeria. There is great demand for products from cassava processing. Such products apart from the traditional foods, include industrial raw materials like native and modified starches for the textile, food and beverages, pharmaceutical, pulp and paper industries etc, sweeteners e.g. glucose/dextrose, fructose, citric acid, for both the beverage and pharmaceutical industries, dextrans and other adhesives for packaging industries etc, ethanol for beverage, pharmaceutical, and cosmetic industries, as well as high quality unfermented cassava flour for bakery and confectionery industries.

It is roughly estimated that more than 40 million tonnes of cassava would be needed to satisfy the demand of the different industries for the aforementioned products. Demand will also increase as a result of some policy actions taken by the Federal Government including:

- (i) the setting up of a Presidential Committee on national cassava production and export in 2002,
- (ii) mandatory requirement since January 2005 that 10 percent cassava flour should be included in all composite formulations for the baking and confectionery industry and
- (iii) the introduction of gari in the National Strategic Food Reserve Programme which hitherto was limited to grains.

The supply for the cassava is at present, inadequate due mainly to some factors such as inadequate pricing for the tubers and processing centres among others. This does not however, imply that there is inadequate availability of cassava roots in the country. The problem of supply is mainly due to inadequate pricing. This is because a number of producers find it inexpedient to sell their roots at the price offered, thus leading to some of them leaving the roots in the farms; resulting into wastage in some cases. The suppliers of cassava roots are mainly the farmers. This is because cassava cannot be stored after harvest. The presence of middlemen in the supply chain of cassava is at present, very significant. These exist mainly when there are large-scale processors of the roots.

To get an update on marketing constraints facing farmers in the study area, selected cassava farmers in the participating states were engaged in a focused group discussion. The result which is presented in Table 2.3

Table2.3: Cassava Marketing Constraints

Marketing Constraints	RANK
Lack of market	1
Lack of stroage facilities	3
Lack of credit	2
Poor group formation	
Lack of information and awareness	4
High cost of transport	
Lack of processing equipments	5
Problem of middlemen	
Insecurity	
Lack of standard bags for sales	

Coincidentally, issue of market access- specifically market availability was ranked the as the number one constraint facing cassava farmers in relation to market. Further probing show that market access was a general problem which manifest in various forms such as: poor road network, high cost of transportation, activity of middle men, fluctuating prices, absence of standard measure, unfriendly taxes and revenue regimes, lack of market information etc. They

all sum up to constitute the problem of market access particularly to small holder farmers. The medium/large scale farmers also appears to know of the existence of more markets than the small holders whose produce are often bought at ridiculously low price to meet the demand of bigger and some time distant markets.

(D). Table 2.4 SWOT ANALYSIS ON CASSAVA CHAIN DEVELOPMENT

Strength	Weaknessess
<ul style="list-style-type: none"> • Available arable land area. • Available market, locally and internationally. • Adaptability of cassava to different soil conditions. • Conducive weather conditions for increased production. • Human resources • largely in the rural areas. • Available improved cultivars. • Viable and functional stakeholders' associations, . • Available labor for processing, especially among women 	<ul style="list-style-type: none"> • Problem of middlemen • Lack of access to distant markets • Transportation/bad road network • Lack of /high cost processing equipment • Poor storage • Cost of labour/input • High cost of tax/revenue • Lack standard packaging bags
Opportunity	Threats
<ul style="list-style-type: none"> • Developing human capital development by focusing on the youth who are presently restive. • Filling the demand gap for food and supplying food items to the subregion. • Exploring investment through public–private partnerships. • Availability of research institutes such as NCRI, 	<ul style="list-style-type: none"> • Lack of sufficient market • Inadequate capital • High cost of transportation • Poor govt policy • High cost of production • Poor road network • No insurance • Poor agricultural extension • Inadequate power supply • Fire disaster

<ul style="list-style-type: none"> • IITA, FIRRO, and RMRDC. • Availability of high-yielding cassava varieties. • Opportunities to export cassava and its products. • Available markets. • Industrial use as a cheap raw material • Easy linking of stakeholders in the value chain. • Efficient market information system. • Increased production. • • Availability of more cassava products. 	<ul style="list-style-type: none"> • Farm pest • Climate change • Financial involvement /Gender disparity
---	--

2.2 MAIZE VALUE CHAIN

(A) *Maize Production and Cropping System*

The cultivation of maize in Nigeria is performed in two major ways depending on the environment and customs of the people concerned. Sole cropping is seldom practiced; the great majority of the maize crop is grown as mixed crop with yam, cassava, guinea corn, rice, cowpea, groundnut, soybeans etc. Maize is typically intercropped with other food crops, with the predominant combinations varying by production zones. When grown in mixtures the maize is usually in low density mixed with one or more associated crops including cassava, sorghum, pumpkin, cowpea, groundnut, yam, sweet potato, rice, vegetables etc. Mixed cropping lowers maize yields, but it helps farmers increase the overall productivity of the resources invested in agriculture and reduces losses if any of the crops fails. However, some farmers grow a super imposed mixture of the maize with legumes particularly groundnut, soybean and cowpea. In the case of groundnut and soybean, the crops are intercropped at the onset of the season while cowpea is usually planted three to four weeks after the maize relay.

The population of the legume is usually lower and optimum population of the maize is maintained which results in higher yields. A common mixture is also that of maize with either millet or sorghum or all the three in few instances. All combinations with maize were found to yield better than the standard millet/sorghum mixture suggesting that inclusion of maize increase the total grain yield of the crops. Despite the fact that maize in the savanna regions is usually grown in mixed stands, monocropped maize is becoming prevalent for all categories of farmers (small, medium and large scale farmers).

As shown in Table 2.5 maize is produced in all the agro-ecological zones in the country. The trend of maize production does not show any significant improvement between 1999 and 2004. Clearly, it shows that the NC is the leading producer of maize in Nigeria. The contribution of this zone to total maize production averaged 34.13% during the period while the share of SE (8.11%) seems to be the least. The only zone where production followed an upward trend is Southwest (Fig. 3.7). Land area under maize cultivation trended upwards in SW and NE, virtually stagnated in SE and SS but followed a declining trend in NW and NC (Fig. 3.8). There is also no significant improvement in yield. On the average, the yield of maize ranges from 1.14mt/ha in NE to 1.9mt/ha in SE.

Table 2.5: Maize Production in Nigeria, 1999 – 2004

	1999	2000	2001	2002	2003	2004
NORTHWEST (NW)						
-Area ('000Ha)	752.56	642.116	735.94	727.72	616.93	647.92
-Output ('000MT)	1128.79	908.04	870.74	880.77	896.63	1001.22
-Share of Total (%)	22.55	20.50	20.07	20.01	20.10	20.67
-Yield (MT/Ha)	1.5	1.41	1.17	1.21	1.45	1.55
NORTHEAST (NE)						
-Area ('000Ha)	604.66	515.62	520.72	522.82	532.763	747.14
-Output ('000MT)	727.15	593.21	587.52	593.13	603.34	828.51
-Share of Total (%)	14.53	13.39	13.54	13.47	13.52	17.12
-Yield (MT/Ha)	1.20	1.15	1.13	1.14	1.133	1.11
NORTH CENTRAL						
-Area ('000Ha)	958.61	867.93	835.29	816.62	835.2	798.18
-Output ('000MT)	1556.06	1401.89	1270.05	1258.26	1287.01	1211.00
-Share of Total (%)	31.08	31.89	29.00	28.58	28.85	55.01
-Yield (MT/Ha)	1.62	1.62	1.52	1.54	1.541	1.51
SOUTHWEST (SW)						
-Area ('000Ha)	502.7	461.45	483.43	506.65	398.42	559.22
-Output ('000MT)	781.6	734.47	816.74	866.99	877.63	948.06
-Share of Total (%)	15.61	16.58	18.83	19.69	19.67	19.58
-Yield (MT/Ha)	1.55	1.59	1.69	1.71	2.20	1.70
SOUTHEAST (SE)						
-Area ('000Ha)	180.54	184.81	189.91	191.69	194.69	203.52
-Output ('000MT)	363.29	358.77	368.52	369.62	369.62	390.59
-Share of Total (%)	7.26	8.10	8.49	8.29	8.29	8.07

-Yield (MT/Ha)	2.01	1.95	1.74	1.942	1.90	1.92
SOUTH SOUTH (SS)						
-Area ('000Ha)	279.52	267.20	128.38	265.50	266.58	276.21
-Output ('000MT)	449.10	432.41	425.02	431.33	426.84	463.47
-Share of Total (%)	8.97	9.76	9.80	9.70	9.57	9.57
-Yield (MT/Ha)	1.61	1.62	1.59	1.63	1.60	1.68
ALL ZONES						
-Area ('000Ha)	3278.60	2939.70	2896.70	3030.60	2844.60	3232.20
-Output ('000MT)	5006.00	4428.80	4338.60	4402.30	4461.10	4842.80

Source: Underlying data from the Project Coordinating Unit of the Federal Ministry of Agriculture and Rural Development, Abuja

Maize production is still faced with a number of constraints in all the states visited. Table 2.6 present a summary of constraints facing cassava production in the study area.

Table2.6. Production Constraints

Constraints	Rank
▪ Lack of hybrid seed	5
▪ Problem of striga	1
▪ High cost of fertilizer	2
▪ Price fluctuation/inefficient market	3
▪ Incidences of pest and disease	4
▪ Lack of access to credit facilities	
▪ Land tenure system/women limited access to land by inheritance	
▪ High cost of labour	
▪ Lack of mechanized agricultural equipments	
▪ Cattle destruction	
▪ Late rain (climate change)	
▪ Insufficient extention agent	6
▪ Subsidized fertilizer does not get to real farmers	7
▪ Poor storage	

Source: Field data

When the listed constraints were ranked by the stakeholders, the high cost of fertilizer was noted as the number one constraints facing maize farmers. This was closely followed by issue of market access – specifically price fluctuation and inefficient market system. It was observed that more than 70% of the farmers interviewed reported they have either not used fertilizer in the last 2-3 years or used grossly inadequate quantity due to its cost of procurement. There is an urgent need to build the capacity of small holder farmers on input optimization if the administration Maize Green Revolution targeting annual production of 20,000,000 tons is to be realised.

(B) Maize Market Structure

There is still considerable gap in the demand and supply of maize in the country. The gap could be reduced through expansion of land for maize production, rotation, mixed cropping and production of the crop under irrigation where possible. Domestic demand for maize continues to be largely driven by the evolution of traditional markets (e.g. feed and food markets) as well as by industrial use and the development of alternative uses for maize. Maize demand in the country can be estimated to increase at an average of 3.2 percent per year. Traditionally considered a subsistence crop, maize is now transformed into a commercial crop owing to the demands of the feed and poultry industries. Maize producers have become more market oriented and open to the adoption of improved technologies.

In the next two decades, the composition of demand for maize will likely change, with feed use of maize increasing more rapidly than food use. As a result of projected faster growth in feed use, the market for yellow maize will expand relative to that for white maize. A lot of the maize produced in the guinea savanna zone of the country is transported to different parts of the country, north, west and east.

Despite the determination of the government to double the output of maize and promote export, it has not been possible to export maize in Nigeria and the country continue to rely on importation in an attempt to satisfy industrial demand. Due to foreign exchange limitations and competing import demand, however, maize import has declined considerably since 2002 . This has further reduced the supply of the commodity in the country.

Many factors account for the inability of the federal Government to double maize production. The outcome of interview and focused group discussion with maize farmers and relevant NGOs

on the challenges being faced by farmers shows that various factors affect the marketing of maize across the production clusters. Table 2.7 present a summary of this findings.

Table 2.7, Maize marketing constraints

Constraints	Rank
<ul style="list-style-type: none"> ▪ Low price of maize ▪ Middlemen determine market prices ▪ Lack of linkage to processor (industrial/wholesaler) ▪ High cost of transportation ▪ Lack of standard measure ▪ High cost of fertilizer compare to price of maize in the market ▪ Lack of government support ▪ Lack of unity and cooperation among farmers ▪ Delay in payment from local processor. ▪ Weevil infestation ▪ Revenue collection ▪ Selling in bits...not bags 	<p>1</p> <p>4</p> <p>3</p> <p>5</p> <p>2</p>

When asked which are the 5 most important constraints? Small holder market access issue of activities of middlemen – specifically in price determination was mentioned as the number one constraint. The discouraging activities of middlemen were discernible as a major concern to

maize farmers across the participating states. Respondents believe this will continue for a long time till maize farmers are able to cooperate and work in unity. This explains while lack of unity and cooperation among farmers was picked as next most significant constraints

(C) SWOT ANALYSIS ON MAIZE VALUE CHAIN DEVELOPMENT

Strength	weaknesses
<ul style="list-style-type: none"> • Food security • Market • Variety of products • Employment/source of income • Meet household need • Store for sometime • Level of processing by farmers • Land availability 	<ul style="list-style-type: none"> • Poverty • Use of manual labour • High cost of fertilizer • Limited inputs • Price fixing by bulk buyers • Lack of extension • Accessing distant markets • Inadequate storage facilities • Fluctuating prices • Lack of unity of Small Scale Farmers • Lack of direct access to processes • Cost of transportation • Access to subsidized fertilizer • Young people leaving the farms
Opportunities	Threats
<ul style="list-style-type: none"> • Increased production-accessing inputs • Expanding market for maize as raw material • Better market-linking SSF with major processors/supply chain/private sectors partnership • Increased access to credit 	<ul style="list-style-type: none"> • Poverty • Use of manual labour • High cost of fertilizer • Limited inputs • Price fixing by bulk buyers • Lack of extension • Accessing distant markets

<ul style="list-style-type: none"> • Better organisation of SSF • Use of modern equipment • Working directly with processor • Working in groups to tackle middlemen • Farmers fixing prices • Store till optimum price • Farmers-processor • export 	<ul style="list-style-type: none"> • Inadequate storage facilities • Fluctuating prices • Lack of unity of Small Scale Farmers • Lack of direct access to processes • Cost of transportation • Access to subsidized fertilizer • Young people leaving the farms
---	--

3. Problem Facing Small Holder Farmers

In order to design appropriate intervention to improve the competitiveness of small holder farmers, stakeholders were asked to present a detailed list of challenges facing small holder farmers in their state.

Below is a summary of problems facing small holder farmers. A participatory ranking of the problem revealed as to fertilizer, accessing credit and poor and fluctuating market prices as the 3 most important challenges facing small holder farmers in the participating states.

Challenges	RANK
Poor government policy	4
Accessing credit	2
Poverty	
Marketing- poor & fluctuating prices	3
Fertilizer	1
Land acquisition	
(Baranda) middlemen	
Poor soil	
High cost of transportation	
Bad roads	
Climate changes (poor rainfall)	6
Poor storage facilities	5
Poor or near absence of extension services	
Preservation	7
Poor soil fertility	
Unorganized farmers	
Cost of labour	
Absence of modern machinery	

Notwithstanding the ranking of the problem facing small farmers, an in-depth analysis with stakeholders shows group formation as a solution to most of the listed problems. Farmers observed in the course of the discussion that almost every one of them belong to a group and the issue was more than group formation but the quality of existing group.

It was unanimously agreed at this point to do a simple analysis on “why group fail.”

WHY GROUP FAILS

- Skeptism about group
- Bureaucratic registration process
- Leadership problem
- Mistrust and lack of unity among members
- Lack of regular meetings
- Lack of shared information
- Lack of common vision
- Lack of shared and understood objective
- Shared resources including monthly contribution
- Support to other members in need
- Bye laws and constitutional help
- Leadership must be democratic

4. PRIVATE SECTOR MAPPING & ANALYSIS

4.1 Private Sector Mapping Process

Stakeholders in each state (Study Areas) were engaged in focused group discussion (FGD) to map out the various private sectors key players involved in the cassava and maize value chain in their states.

The result of the exercise is presented in the tables below.

The finding during the exercise shows that:

- (a). The level of interaction between private sector key players and small holder's farmers is very low.
- (b). Of the 14 main stages/activities of the commodity value chain stake holders could not provide state factory information for about 50%.
- (c). Activities/presence of key players are increasing becoming insignificant.
- (d). The few big time farmers appears to know and interact more with the private sector key players than the small holder farmers especially the women .
- (e). Private sector key players face different level of challenges in working with small holders farmers
- (f). Private sector key players have more direct business relationship with large and medium scale farmers than small holders farmers (25%)

4.2 Category of Private Sector Key Players Interviewed

- Processors (individual/industrial)
- Produce marketers (middlemen)
- Finance Institutions (Private)
- Fabricators
- Transporters
- Wholesalers/input supplier

4.3 Relationship with maize/cassava growers

- | | |
|--|-----|
| ▪ Direct contact | 20% |
| ▪ Contact through contract | 20% |
| ▪ Indirect contact (through middlemen LPO) | 55% |
| ▪ None | 5% |

Business Relationship and type of farmers

- | | |
|------------------------|-----|
| • Large scale farmers | 30% |
| • Medium scale farmers | 40% |
| • Small scale farmers | 25% |
| • Not | 5% |

4.4 Challenges faced in working directly with small holder farmers

- Bargain too low
- Poverty
- High rate of default in loan repayment

-
- Difficulty in accessing credit at commercial rate
 - High level of illiteracy
 - Problem with office procedure
 - Have challenge with labour
 - Inability to cope with delayed payment
 - Have no collateral

4.5 Suggestions for overcoming challenges

- Government/Private institutions should fund banks to give interest free or single digit loans;
- Organize farmers into groups
- Re-establish commodity boards/grain reserves
- Empower fabricators to mass produce basic processing machines at subsidized rate
- Government and Private Institutions should give loans for production while processors guarantee purchase of products
- Private sector key players should work to make payment to farmers within 24 – 48 hours of receipt of produce (maize and cassava)
- Enlightenment and campaign/meeting of fabricators and farmers to find midway on low patronage by farmers.

4.6 BUSINESS MODEL FOR SMALL HOLDER FARMER PARTNERSHIP WITH PRIVATE SECTORS KEY PLAYER

Despite the numerous challenges faced by key sector players in relating with the Small Holder Farmer (SHF), private sector firms are aware of the potential of involving SHF into this business.

According to SNV (2008) several reasons exist for private sector partnership with SHF they include economic benefits, CSR policies part of firms' mission, risk minimization, government incentives, others etc.

STRATEGY FOR PATNERSHIP BETWEEN SHF AND PRIVATE SECTOR KEY PLAYER

1. Integrating SHF as part of firm's production process.

Industrial processors as part of business model to minimize risk associated with supply instability by integrating SHF as part of firms' raw materials production process.

In this partnership, the private sector is committed to building the capacity of SHF as well as strengthening their organisational ability to effectively respond to private sector and firms' demands.

In this model, the private sector also concentrate on strengthening links with SHF by promoting, vertical integration, creating mechanisms to incorporate agents involved in the production chain into the formal economy, and facilitating financing for them. Sometimes, key private sector players in this model establish external alliances to share or reduce cost and risks associated with vertical and horizontal integration.

2. Integrating SHF as final consumers.

In this model, key private sector player in the cassava and maize value chain such as fabricators, transporters, financial institutions etc. integrate SHF as final consumers. The most popular strategies in this model used by firms are the design of specific products and services, the development of appropriate distribution channels, pricing and market analysis. In addition, the private sector firms can use differentiated presentation of productions and services, along with technology development (processing machines) and other marketing strategy to reduce cost and develop products targeted at SHF. Including developing strategy to facilitate payment for products.

Government can promote a positive environment for economic inclusion through specific policies. These policies should take into account the incentive needed by the private sector key players in the maize and cassava value chain.

NASARAWA (cassava)

S/N	ACTIVITIES/STAGE	YES/NO	LIST OF PRIVATE SECTOR
1	Supply of seeds	YES	Cassava growers Association Uriah farms, doma AB Bellow- akurba, Lafia Nagari farms, keffi Maco farms, doma Sule musa nagago farms, nwaba Gunduna farms, karu Panda farms, karu
2	Supply of fertilizer	YES	Government
3	Equipment fabrication		NA
4	Processing	YES	micro farms akwanga Ungwar nnugu processing, lafia Sunday osakade obi Peter akubu agaza
5	Loans/credit		NA
6	Commodity storage	NA	usaini danladi at doma Peter akaba warehoue, lafia Yan dilai store, assakio
7	Extension services/ technical information	NA	
8	Distribution		Alhaji alkali kongo Mobil filling station, lafia Mohammed abdullai, Peter eze akwanga
9	Goods transportation	ANY VEHICLE	
10	Industrial processing	YES	
11	Professional Association		Cassava Growers Association

12	Research	NA	
13	Regional/ international markets		federation of agricultural commodity association of Nigeria FACA
14	Product Branding/ Packaging	NA	

NASARAWA (Maize)

S/N	ACTIVITIES/STAGE	YES/NO	LIST OF PRIVATE SECTOR
1	Supply of seeds	YES	Open market
2	Supply of fertilizer	YES	1. Sunday Joe-store in assakio stoer in ashige, 2. Alahaji danda in sabongida, others on road side in lafia
3	Equipment fabrication		NA
4	Processing	YES	Local Processors
5	Loans/credit		Project Agape, FAHCI
6	Commodity storage		1. Assakio produces association 2. Mall Inusa
7	Extension services/ technical information		1. NADP, YMCA, project agape
8	Distribution		1. there are distribution in sabon gida, lafia east and others in lafia town
9	Goods transportation	ANY VEHICLE	
10	Industrial processing	YES	
11	Professional Association	NA	
12	Research	NA	
13	Regional/ international markets	NA	
14	Product Branding/ Packaging	NA	

PLATEAU STATE (maize)

S/N	ACTIVITIES/STAGE	YES/NO	LIST OF PRIVATE SECTOR
1	Supply of seeds		WACOT SAVANA SEEDS- JOS VSO/CCDP, ASTC (agricultural services and Training Centre) Mangu
2	Supply of fertilizer		Open market
3	Equipment fabrication		
4	Processing		MANGU GINDIRI ROAD

5	Loans/credit		
6	Commodity storage		
7	Extension services/ technical information		CCDP
8	Distribution		
9	Goods transportation		Motor park
10	Industrial processing		grand cereal – jos south Nasco Foods – Jos, Ecwa Feedds- Jos Pioneer Milling ompany
11	Professional Association		
12	Research		IITA
13	Regional/ international markets		
14	Product Branding/ Packaging		

PLATEAU STATE (Cassava)

S/N	ACTIVITIES/STAGE	YES/NO	LIST OF PRIVATE SECTOR
1	Supply of seeds		Open market
2	Supply of fertilizer		Taimako sarki – shendam
3	Equipment fabrication		Sylvester titlong – yelina
4	Processing		Danjuma makama-shendam martins shaldas – shendam yusuf rammat – langtang Farmers cooperative – dungini – kalong Justice pius damulak – qpan Christian dodo – kalong Alh ibunu musa – namu/qpan Chanso Village
5	Loans/credit		Micro finance Bank- Mangu
6	Commodity storage	NA	
7	Extension services/ technical information		CCDP
8	Distribution	NA	
9	Goods transportation		Motor park
10	Industrial processing		grand cereal – jos south Nasco Foods – Jos, Ecwa Feedds- Jos Pioneer Milling ompany
11	Professional Association		CCDP
12	Research		IITA
13	Regional/ international markets		
14	Product Branding/ Packaging		

OYO State (maize & Cassava)

S/N	ACTIVITIES/STAGE	YES/NO	LIST OF PRIVATE SECTOR
1	Supply of seeds	YES	ALH ADEKOLA STORES,IWO ROAD
2	Supply of fertilizer	YES	OPEN MARKET, OGUNPA
3	Equipment fabrication	YES	EZEKIEL ENGINEERING COY,

			KENNETH ENGINEERING Nova Tech Ibadan, Fatoury Iwo Road
4	Processing	YES	OLANIYONU CASSAVA PROCESSING
5	Loans/credit		LAPO,SEAP, FADU
6	Commodity storage	NA	
7	Extension services/ technical information		JDPC, IITA
8	Distribution	NA	
9	Goods transportation	ANY VEHICLE	
10	Industrial processing	YES	ATMANCORP,FEEDMILLERS Ekha Agro Lagos –Ibadan Express ATMANCORP,FEEDMILLERS Sumal Foods Ltd. Ibadan Real Food and Allied industry Ltd. Ibadan Km 19,Ibadan-lfe Nigerian Eagle Flour Mills Ltd., Ibadan Lister Flour Mills (Nig.) Ltd Ib.
11	Professional Association	NA	
12	Research		IITA
13	Regional/ international markets	NA	
14	Product Branding/ Packaging		IITA

BENUE STATE (CASSAVA & Maize)

S/N	ACTIVITIES/STAGE	YES/NO	LIST OF PRIVATE SECTOR
1	Supply of seeds	YES	Open market
2	Supply of fertilizer	YES	1. Farmers friend near federal government girls college, vandeikpa, 2. wadata marketers
3	Equipment fabrication	YES	Zhomo and sons limited
4	Processing	YES	1. Processing into flour at konshisha 2. Industrial layout markurdi 3. Processing at rice mill at gboko local govt 4. Processing at tywanye in buruku local govt 5. Mighty Agro Mill enterprises
5	Loans/credit		1. Asset resort markurdi Widows foundation (in methodist church) 2. Gifortune emergency loan office
6	Commodity storage	NA	
7	Extension services/ technical information	NA	

8	Distribution		Transporters in Gboko
9	Goods transportation	ANY VEHICLE	
10	Industrial processing	YES	Apex Export Product(Ind)layout
11	Professional Association	NA	
12	Research	NA	
13	Regional/ international markets	NA	
14	Product Branding/ Packaging	NA	

5. RECOMMENDED INTERVENTION

5.1 CASSAVA SUB SECTOR

- Strengthening the capacity of farmers groups and association to deliver on goals and objectives through organizational diagnosis, mission statement refinement, leadership training, strategic management, growth and development planning etc so as achieve competitive advantage.
- Establishment of processing sheds in different production clusters where women can go and add value to commodity through processing.
- Organize farmers groups into Multipurpose Cooperative Society with the aim of investing in processing and breaking the monopoly of middlemen. The Cooperatives should be based on existing production cells and knowledge gained from successful farmers cooperative societies models in Nigeria.
- Facilitate mechanisms for the re-introduction of marketing board for the protection of farmers.
- Provision of adequate policy and infrastructure to support industrial development of cassava.
- Promote investment in primary, secondary and tertiary levels of processing.
- Form a coalition of NGO driven Private –Public Partnership for the development of domestic market. The private sector investing in market development and procuring needed machinery. The public sector to provide needed policy environment, improve competitive technology and physical infrastructure.

-
- Facilitate market diversification through strengthening of the weak links among industrial processors, fabricators, cassava product development in Nigeria.
 - Streamline the activities of the various cassava related private associations NGOs to be goal – focused. These associations includes:

Cassava Produce Promoters and Export Association of Nigeria (CASPEANS)

Cassava Equipment Fabricators of Nigeria

Cassava Processors Association of Nigeria

Cassava Growers Association of Nigeria

- NGO should facilitate the establishment/strengthening of viable market linkages through written supply agreement between processors and clustered cassava producers. (NGO NEGOTIATED MARKET CONTRACT) as solution to Access to market.
- Public –Private Investment (NGO –Driven) investment in transport/distribution services, Quality Infrastructure, market Information development and disseminations.
- Advocacy, campaign and dialogue with State and National Legislature for a protection of small scale farmers especially women through provision of enabling policy instruments including provision of interest free loan.

5.2 MAIZE SUB SECTOR

- Operationalization of private extension system to provide technical production and marketing information to farmers
- Training of farmers groups on farm input optimization for improve yield
- Organize farmers groups into Multipurpose Cooperative Society with the aim of investing in processing and breaking the monopoly of middlemen. Facilitate mechanisms for the re-introduction of marketing board for the protection of farmers.
- Provision of adequate policy and infrastructure to support maize supply to meet industrial needs
- Promote investment in primary, secondary and tertiary levels of processing.
- Form a coalition of NGO driven Private –Public Partnership for the development of domestic market. The private sector investing in market development and procuring needed machinery. The public sector to provide needed policy environment, improve competitive technology and physical infrastructure.

-
- Facilitate market diversification through strengthening of the weak links among industrial processors, fabricators, maize product development in Nigeria.
 - Advocacy, campaign and dialogue with State and National Legislature for a protection of small scale farmers especially women through provision of enabling policy instruments including provision of interest free loan.
 - NGO should facilitate the establishment/strengthening of viable market linkages through written supply agreement between processors and clustered maize producers. (NGO NEGOTIATED MARKET CONTRACT) as solution to Access to market.
 - Public –Private Investment (NGO –Driven) investment in transport/distribution services, Quality Infrastructure, market Information development and disseminations.

OXFAM GB NIGERIA:

Stakeholders Workshop on Market Research

&

Private Sector Mapping.

March 29-30 2012.



DAY 1

PRESENTATION OF KEY FINDINGS:

(1) CASSAVA MARKET RESEARCH AND PRIVATE SECTORS MAPPING.

(2) Discussion Groups

(a) Access to Farm Inputs

(b) Farmers Organisation

(c) Access to Credits

(d) Market Access

(e) Processors Group

ACCESS TO INPUTS

Critical Issues

- Seeds: High cost; where this is available, the cost is beyond the reach of SSF
- Diversion by powerful individuals/organisations for profit maximization
- Adulteration of farm inputs and sale of expired chemicals
- Unavailability of simple agro machineries, improved seedlings and herbicides
- Inadequate knowledge on how to use the inputs
- Conservatism by some farmers in adopting new technology and lack of technical knowhow.

Actions to be taken:

- Need to make farm inputs available to farmers through; farmer cooperative leaders, private sector and government should also provide the enabling environment
- To address high cost of inputs, farmers should buy in bulk through their cooperatives.
- Information should also be made available through farmer organisations and involve them in the distribution of inputs.
- Government and leaders of farmers organisations should be involved in the monitoring of the distribution of farm inputs to curb diversion
- There should be intense enlightenment of farmers through the media, farmers and relevant government agencies and a feedback medium established to tackle the issue of adulteration.
- Farmers can also go into seed multiplication with proper knowledge and practice.
- Encourage the establishment of demonstration farms using contact growers
- There should be regular capacity building by government, NGOs' CSOs' and farmers groups to improve technical knowledge of farmers.

FARMERS ORGANISATIONS

Critical Issues:

- Farmer groups/cooperatives are not monitored
- Problem of leadership; trust/competency – dedication/Accountability
- Poor communication: Communication gap exist within members, there is a need to share information to curb ignorance.
- No vision/focus; strategic plans are not in place for group development
- Unnecessary administrative bottle necks by financial institutions for groups to access credit.
- Political infiltration/influence; Politicians use the cooperatives for their political ambitions and impose leaders on groups.

Actions to be taken:

-
- Cooperative officers, Ministry of Commerce & Industry at state and local govt should do proper monitoring of groups.
 - Capacity building for leaders and members on regular basis on roles and responsibilities
 - Critical analysis of past profile of who will be leaders and election without bias
 - Farmers at rural level must be a member of a group to benefit from development activities
 - Information sharing and step down trainings and other critical issues affecting the group.
 - Adherence strictly to the bye law guiding the group/cooperative.
 - Equality of all members with no preferential treatment.
 - Members must be real and related to the purpose for which the group is formed to minimise political influence.
 - There must be good orientation before registration.

Who will help and how?

- Farmers: Join a cooperative that is duly registered. Should also change their value orientation
- Registered groups/cooperatives: Should take interest of members paramount and have a unity of purpose. They should also seek for capacity building. Transparency and accountability should be taken paramount. Exchange visits can also be organised for members for knowledge sharing.
- NGOs' & CSOs': Should provide capacity building to farmers and facilitate platform for advocacy
- Financial Institutions: Provide credit facilities and capacity building to farmers groups.
- Local, State and Fed govt: proper supervision and monitoring enact favourable policies and provide capacity building to farmers.

ACCESS TO CREDIT GROUP

Critical Challenges

- Unfavourable collateral from farmers
- High interest rate
- Poor attitude of farmers towards repayment
- Inappropriate time of disbursement of loan
- Misappropriation of loan by government

Actions to be taken:

- Formation of farmer groups between 10-15 members according to commodities whose activities will be regulated by an apex body at the centre
- Government should make a policy regulating all agricultural loans to a single digit interest rate.
- Proper and close monitoring and evaluation of benefiting farmers to ensure that credits are not diverted.
- Ensure timely disbursement of loans to farmers based on operational needs.

-
- Encouragement of savings and loans schemes among the groups.

-

Who can help us and how?

- Government should encourage the policy of PPP arrangement to facilitate the private sector in the implementation of agreed policies in the sector.

MARKETS ACCESS GROUP

Critical Issues

- Inadequate marketing information and lack of awareness. There is also a poor attitude towards disclosure of information among farmer groups themselves and a general lack of infrastructure e.g. IT, feeder roads etc.
- There is also difficulty in accessing the markets due to location, lack of information, poor road network and illiteracy.
- Small producers lack power in the market. It's a buyers' market and this creates room for rip off and discourages production.
- Poor/substandard packaging/quality of the product.
- Unstable/volatile food prices.
- Unfavourable market regulation practices
- Unconducive market environment
- Insufficient handling storage technology

Actions to be taken!

- Strengthen MIS for cassava farmers – effectiveness of producer groups.

Who can help us and how?

- Government should formulate and implement profitable agric policies and provide inputs at subsidized rate.
- NGOs' and Civil Societies: Through research, capacity building of farmers and processors, facilitation of stakeholders meetings and the provision of market information.
- Research Institutes: High yielding seeds/stems, farmers trainings and fabrication of machinery spare parts.

PROCESSORS GROUP

What are the critical Challenges?

- Price instability

-
- Lack of access to quality raw materials
 - Instability/high cost of power i.e fuel
 - Lack of access to local machinery parts
 - Policy inconsistency
 - Poor infrastructural development
 - Access to capital
 - High cost of transportation.

Actions to be taken!

- Price determination through direct consultation and negotiation between producers & processors
- Training of farmers on production of high quality and quantity of cassava
- Provision of stable public electricity
- Encourage local fabrication of spare parts and implementation of zero duty on agricultural machineries
- Formulation and implementation of favourable agricultural policies
- Provision of low interest policies to credible processors
- Regular consultations and dialogues among all stake holders including banks, NGOs, Transporters etc.

DAY 1 General Observation and Comments

- ✦ Apart from linking farmers to producers and suppliers, standards should be improved to ensure quality
- ✦ All improved varieties are less of sionite content and are safe to eat
- ✦ There should be regular training of farmers on quality assurance to meet standards of processors. This should be done alongside other stakeholders.
- ✦ Nigerian Government is developing 18 factories with capacity of processing 120 metric tons per day. This is expected sometime this year
- ✦ Value addition, farmers' coordination, regulating demand and supply can address price fluctuation.
- ✦ Value system is one of the major reasons why agriculture is failing in Nigeria. This is visible at many instances; loans, cooperatives, information sharing etc.
- ✦ Group strengthening should be a key intervention.
- ✦ Processing at village level should be discouraged due to quality standards at this level. If at all, there should be serious training and testing before going into processing to ensure it meets set standards of major processors.
- ✦ We always neglect state and local governments in policy influencing; serious attention should be given to them in this regard. The federal government should be concerned with providing the overall framework. There is a need for state and local governments to buy into policies coming from the federal government otherwise there will not be that ownership of it.
- ✦ Government cannot monitor itself. NGOs', farmer groups etc should be active in these areas. Farmers need to be galvanised to become a critical political force.
- ✦ Government alone cannot handle marketing boards. Farmers and stakeholders alike should come together to develop strategic marketing arrangements.
- ✦ Not everything applicable in other countries will be practicable in Nigeria. For instance, the Cocoa marketing board in Ghana is successful but cocoa farmers in Ghana are much poorer than the farmers in Nigeria.
- ✦ Micro finance is more by far better with less bureaucracy, collateral and interest rates requested by the Micro Finance Banks.
- ✦ It's essential to collaborate with Road Safety, VIO and other road regulator to ensure/enforce car maintenance to avoid car breakdown and avoid irrelevant arrests which make the transportation of produce very difficult and expensive
- ✦ Every LGA has a sticker contracted to a private individual that you are expected to buy as a form of revenue generation. This makes the amount paid on farm produce very high resulting in high food prices. There is a need to advocate for the reduction/regulation of such activities.
- ✦ Timely disbursement of loan to farmers will discourage diversion by farmers.

-
- ✚ Savings and loans initiatives should be encouraged among farmer groups. Even if they collect loans from finance institutions, they should encourage themselves to make weekly contributions during their meetings so as to ease burden at the time of repayment!
 - ✚ Both the farmers and the producers should negotiate risk mitigation/bearing so as to avoid one party having to bear all the loss.
 - ✚ A concern was raised on the issue of requesting for grants by the farmers. How realistic is this? If it is difficult to assess loans that will even be repaid, how much of something that is free.
 - ✚ “farmers blow your trumpet, tell us what you have” grand cereals
 - ✚ Farmers should use proper packaging for their produce; it should not weigh more than 100kg.
 - ✚ Safety should be a top priority in handling food items especially in the open market. This should be an advocacy issue with relevant government departments eg NAFDAC



DAY 2

PRESENTATION OF KEY FINDINGS:

(1) MAIZE MARKET RESEARCH AND PRIVATE SECTORS MAPPING.

(2) Discussion Groups

- (a) Transportation**
- (b) Government & Policies**
- (c) Extension Services**
- (d) Post Harvest Handling**
- (e) Farmers Group**

TRANSPORTATION

What are our most critical challenges?

- Poor road network
- High cost of transportation
- Too much road taxation
- Poor maintenance culture
- Poor access to means of transportation
- High cost of maintenance
- High cost of fuel

What actions can we take to address these issues?

- Construction of more roads and regular road maintenance
- Continues dialogue and meetings with NUTRW for fair transport fare
- Reviving the railway
- Advocate for the removal of unnecessary check points & revenue collections

-
- Advocacy visit to VIO, Road Safety and police to ensure only road worthy vehicles ply the road as well as stop unnecessary arrest of drivers transporting agricultural produce.
 - Advocate for subsidized vehicles to small scale farmers associations
 - Collaborate the National Directorate of Employment & other experts for vehicle maintenance
 - Stable government policy

Who can help us?

- Civil Society Organisations & NGO's through mobilization and facilitation of processes mentioned above
- Government & relevant agencies through legislation and policy formulation
- NURTW through continuous cautioning and sensitization of their members
- Leaders of organised farmers groups like ASSAPIN, AFAN through advocacy and mobilization of members to take actions
- Local and International NGOs through capacity building and funding of activities

GOVERNMENT & POLICIES

Critical issues

- Stakeholders are not involved in policy formulation; top-bottom approach leading to lack of ownership of policies
- Policies are not consistent and lacks continuity
- Policies are most of the times not implemented
- Financial policies do not favour SSF
- Most policies are not legislated

Actions to remedy issues

- Develop advocacy & lobby strategies to make sure policies are implemented eg the 30% usage of cassava flour in bread.
- Monitoring agencies should be put in place for compliance. Eg NAFDAC
- Involvement of SSF and other relevant stakeholders in policy formulation
- Advocate for support to ADPs for technical support to farmer
- Village level processing should be enhanced
- Simple mechanisation practices should be developed and enhanced
- Ensure policy consistency through advocacy
- Formulation of agricultural finance policies that favour SSF
- Reviving the marketing boards to ensure price stability

Who can help us and how?

- Local & International NGO's and CSO's: Support for capacity building on lobby and advocacy and providing linkages
- Government: Change of policies and practices as well as monitoring implementation
- Legislature: Monitor policy implementation and query budget allocation when necessary for favourable allocation to the agricultural sector

EXTENSION SERVICES

Critical Issues

- Lack of mobility; poor funding of extension officers
- Insufficient staff
- Low technical capacity of field officers; low motivation of field officers
- Lack of cooperation from farmers
- Insufficient/low women extension agents
- Lack of adequate orientation or interest of political office holders
- Lack of input to work with

What actions can we take to address issues?

- Increase funding of extension agents
- Government should either scrap out or restructure the ADPs since it is the rural development wing of the ministry of agriculture
- Enlighten the political office holders on the critical importance and benefit of having a strong extension service
- Conduct a critical needs assessment of the extension agents with the aim of strengthening their capacity
- Proper orientation and engagement with farmer groups
- Involve women in extension service delivery
- Recruitment of more professional extension officers

Who can help us and how?

- Farmer groups and CSO's: pay advocacy visit to the Local, state and federal government including the media to enlighten them
- Government: Through review of policies to strengthen the ADP's for greater productivity. Also to increase budget allocation and spending for recruitment, training & provision of other necessary incentives for extension officers.
- Extension officers: Development of a comprehensive data base of farmers by the extension officers

-
- Farmers: Should mobilize themselves into functional groups to access extension services

POST HARVEST HANDLING

Critical issues

- Inadequate storage facilities and other relevant infrastructures
- Inadequate knowledge in the application of pesticides
- Unfavourable market price
- High cost of transportation
- Lack of information
- Inadequate man-power and equipment

Actions to address issues

- Organisation of farmers to negotiate fair prices for their produce
- Provision of modern storage facilities
- Training of farmers on the application of pesticides and other chemicals
- Capacity building
- Group approach to market

Who can help and how?

- Farmer associations
- Provision of enabling environment by government, NGO's, donors and farmers.



FARMERS GROUP

What are our most critical issues?

- Low leadership capacity within the farmer groups
- To educate the farmer groups of high yield varieties of cassava stem and the introduction of mechanised farming
- Financial assistance to be given to groups and cooperatives.
- Inadequate supply of fertilizer
- Grant or loan to be given to farmers before land preparation.
- Amount for the registration of farmer cooperatives should be reduced and be made uniform throughout the country.
- Loans should be made accessible at a reduced rate without collateral.

Action to be taken!

- Capacity building of farmer groups on leadership skills, group formation, book keeping etc
- Provision of loan by government at subsidized rate.
- Fertilizer to be given directly to the farmers at a reduced or subsidized rate.
- Grant is to be more preferably given to farmers by the government.
- Certificates of cooperative societies to be given in states at a reduced rate.
- Grace period to be given to farmers who obtain loan.

Who can help us and how?

- Farmers themselves
- Government agencies
- Private sector



DAY 2 General Observation and Comments

- ✦ IITA should have a liaison in every region to allow easy access of information and latest technology. There are other research institutes in Zaria and Minna where farmers can also access information.
- ✦ One key challenge for research institutes is having to go through the bureaucracy of government. The policy says that for any improved seedling to reach the farmer, it has to go through agricultural research institutes which sometimes take years. Changes in climate sometimes make these findings irrelevant when they finally reach the farmers.
- ✦ VSO is hoping that it can work with Oxfam to review all agricultural policies with a view to reducing the bureaucracy involved and making them more efficient.
- ✦ ASTC model in Jos should be replicated in different states to empower and build farmers capacity.
- ✦ A GIS for farmers should be established to provide more credibility. Technology has been available for years in UI and ABU.
- ✦ Extension services functioned well during the World Bank funding. So it is imperative to look inwards to solutions that come from the communities that will be more sustainable. But NGOs' need to play a catalytic role.
- ✦ FACAN mentioned that the Poultry association of Nigeria requires about 2 million tons of maize annually. They are currently lobbying the federal government to get hold of the silos' in the country so they can buy and store maize and they are willing to buy directly from the farmers. So there is a need for the maize farmers need to get organised and negotiate with the poultry association while Oxfam and other NGOs' should support with capacity building.
- ✦ Land clearing is one major reason why young people are not interested in agriculture. Young people can only be involved in agriculture if it is made attractive. Lack of social infrastructure in the rural communities also encourages young people to move into the cities for better life, hence making these infrastructures available will discourage rural urban migration.

-
- ✦ It is very important for the various associations to look at what they can do for their members. In other countries, the people who need help are the ones who organise workshops
 - ✦ The need to train agric desk officers of the different banks to build their capacity on Agric lending to be able to establish basis for giving out loans to farmers.
 - ✦ Privatization of agric extension will further worsen the plight of farmers. SSF will not be able to access these services as in the case of accessing other inputs. Private businesses will always go to where they can maximise profit and certainly not the SSF.
 - ✦ FACAN has been given a window by the federal government in the on-going exercise of registering SSF to register as many farmers as possible. However, it was noted that the federal government should not have even concerned itself with this; it should have been the responsibility of the state and local governments.

Comments from group presentations:

- ✦ Farmer visits should be encouraged to promote knowledge and information sharing. With good coordination, farmers can arrange for research institutes to come and share latest technology with them.
- ✦ There is a need to select the right seed for the right climatic region. Early maturing variety will still be on the field while rain is falling.
- ✦ “if truly we are looking at farming as a business, farmers must begin to pay for services provided e.g extension services since they pay for the labour on their farms anyways. Such free services are not sustainable. We must first of all see what we can do before looking out. A good example is the community agric volunteers scheme”.

References

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CIMMYT, Mexico

Morris M, Melcuria M, and Gerpacio R. 2005. Impact of CIMMYT Maize breeding research.

Langyintuo, A. S., et al: Challenges of the Maize Seed Industry in Eastern and Southern Africa:
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500-Maize global alliance for improving food security and the livelihoods of the research poor.....
A Joint Proposal by CIMMYT & IITA (2011)

Olomola (2007) Competitive Commercial Agriculture in Africa: Nigeria Case Study. Nigerian Institute of Social and Economic Research (NISER) Ibadan.

Appendix 1

LIST OF PRIVATE SECTORS INVOLVED IN CASSAVA VALUE CHAIN

No	INDUSTRY	CONTACT
STARCH		
1	Nigerian Starch Mills Ltd. Ihiala, Anambra State	Stuthers Jeff, 0803359815 c/o Ajumogobia and Okeke, NAL Towers 2 nd Floor, 20 Marina Lagos
2	Real Food and Allied Industry Ltd. Ibadan	Km 19, Ibadan-Ife Expressway Olope Meji, Ibadan. Tel: 02-8101926, Mobile: 08023245024
3	MATNA Foods Company Ltd, Akure	J.J. Adewale, AGM Finance and Administration, N.I.B House, Owo Rd, P.O. Box 528 Akure, Tel 0803-3581071
4	Tygon Chemicals	Giwa Street (opposite Trade fair Complex (no Longer in operation)
5	Femtex Nig. Ltd. Lagos	R.A. Tella (production Manager) 1/7 Odutola Street, Gegento Bus-stop, Oko-Oba, Agege, Tel: 01-4925093
ETHANOL		
6	Allied-Atlantic Distilleries Ltd. Lagos.	A. Dhiman (Technical Manager), J. Owoeye (Commercial controller) KM 40, Abeokuta Expressway, Sango Otta, Ogun State. Tel: 01-7742172, Mobile: 08033216323
7	Nichben Group of Companies, Awo-omamma, Imo State.	Malachy Nkele Ike, Group Public Relations Manager, Km 25 Owerri Onitsha Road, Awo- Omamma, Imo State.
8	Jacobs Wines Ltd., Mgbidi, Imo state	Frank Jacobs (Chairman/CEO) 1 Frank Jacobs Avenue, Mgbidi, Imo State. Mobile: 08033329967
FLOUR		
9	Nigerian Eagle Flour Mills Ltd., Ibadan	Mario Chagoury (Head Miller) Eagle Flour Road, Toll point,

-
- | | | |
|------------------------------------|--|--|
| 10 | Lister Flour Mills (Nig) Ltd. | Ibadan / Lagos Expressway,
GSM: 08033239123, D/L (02) 2315874
Ismail Alao (General Manager)
Km 8-9 Old Lagos Road Podo Village, Ibadan,
Nigeria. Tel: 02-2316103,
Mobile 08023166772 |
| 11 | Alubo Processing Complex | Mrs. Rabi Umoru, President of Women's
Cooperative, Family Support Programme
(FSP), Lafia |
| DEXTRIN / ADHESIVES / PAPER | | |
| 12 | Tanu Group Ltd. Aba, Nigeria | Samuel E. Udoh (Factory Manager)
Kilo 1, Opobo Road, Aba, Abia State,
Nigeria. Tel: 082-226751, Mobile: 08035528636 |
| 13 | De-Ladder Establishments Ltd. Benin City,
Nigeria | Dr. R. E Ehigiamusoe (Executive Director)
No 10 Ogbegie street, Ugbowo, Benin.
Tel: 052-602034, 25447, Fax:234-052-602034
Or Jude Asemota: 08033840077 |
| 14 | Star Paper Mill Ltd. Aba, Nigeria | Robert Nnana-Kalu Esq. Executive Director,
114/116 Aba-Owerri Road, Umungasi Aba,
Abia State, Nigeria. |
| LIVESTOCK FEED | | |
| 15 | Livestock Feeds, Aba & Lagos Branches | 1. O.H Buharshak (Technical Manager)
12 Industrial Layout, Aba, Abia State.
Tel:082-220612 , Mobile:080-33214005
2. Mrs. Mope Omotoso (Quality Assurance
Manager)
1 Henry Carr street, Ikeja, Lagos
Tel: 4971819, Mobile:08023229239 |
| 16 | SEEPC (Nig) Ltd. SANDERS FEEDS,
Aba and Lagos Branches. | 1. Uwakwe, A.M. (Regional Manager)
Aba, Km 66 PH/ Enugu Expressway Aba,
Abia state. Tel:082-440258 , Mobile:
08034070778
2. Mrs C. A. Okonkwo (Quality Assurance
Manager)
Block D, Plot 4A, Wempco Road Ogba
Ind. Scheme, Ikeja, Lagos.
Tel: 4924438, Mobile: 08033247818 |
| 17 | Lady Ify-Ugo Feeds, Umuahia, Abia State | Ugobueze
Ohafia Street, opposite Ekesco Pharmacy,
Umuahia, Abia State. |
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FOOD

- 18 CRISPY (NIG) Ltd. Aba, Abia state Chief K. Ndukwe (Chairman / MD)
45 Milverton Avenue, Aba, Abia state,
Nigeria. Tel: 082-220088, Fax: 234-82-220909
- 19 IJEOMA BAKERY, Aba Mr. Emmanuel Akwue,
c/o CAPAN, Aba Technology Business
Incubation Centre, Industrial Layout Aba
- 20 Kaka Confectioneries Umuahia, Abia state. Mrs Amina Ekeledo (Manager)
Ossah Road, Umuahia, Abia State.
- 21 Sumal Foods Ltd. Ibadan V.P. Sudarsan (Managing Director)
Oluyole Ind. Estate, Ring Road, Ibadan,
Oyo State, Nigeria.
Tel: 02-2310739, 2310186
- 22 Nestle Nigeria Plc. L. A. Arhere, (Supply Manager)
Km 32, Lagos-Badagry Express Road,
Agbara Industrial Estate, Tel: 01-493413-5
Mobile: 08034020241
- 23 DE-UNITED Food Industries Ltd.(Indomie) Ayo Ogunlade (Head, Personnel and Admin)
Otta/Idiroko Road, Otta, Ogun State.
Tel: 039-722264-6, Fax: 039-722266
- 24 UNILEVER Nigeria Plc Tunde Latona, Coy Devt/QA Manager
Desmond Adeola (Marketing Manager)
1 Billingsway Oregun Ikeja Lagos.
Tel: 5803300-9, 1-7732951,
Mobile: 08034021374
- 25 Temitope Bakery And Catering Services Ltd. Elder A.O. Imonah (General Manager)
Sagamu/Benin Expressway, Sagamu,
Ogun State, Nigeria.
Tel.Fax:037-640433, 640044
Mobile: 08033076918.

TEXTILE

- 26 Afprint Nig Ltd. Lagos 1. Ninman John (General Manager
Marketing)
2. Jonarehanan (Technical Manager)
Oshodi Apapa Expressway, Lagos
Tel: 01-7756148
- 27 Nigeria Textile Mills Plc, Ikeja J. M. Alaba (Deputy General Manager)
3, Oba Akran Avenue, Ikeja, Lagos.
Tel: 4978850-4, 4962639

PHARMACEUTICAL

-
- | | | |
|----|---|---|
| 28 | SKG-Pharma Ltd. Ikeja, Lagos | Demola Kolade General Manager
(Technical Services)
Welcome House, Oba Akran Avenue, Ikeja,
Lagos. Tel: 4939069 (D/L) Mobile: 08033291730 |
| 29 | Nigerian-German Chemicals Plc (Hoehst)
Ikeja – Lagos | Chika E. Johnson,
Plot 144, Oba Akran Avenue, Ikeja
Lagos. Tel: 01-4068220-9 (D/L) Fax: 01-
4960482, GSM: 080-23300408 |

Source: IITA(2007) Opportunity in the Industrial Market in Nigeria

APPENDIX II

Focus Group Discussion guide with Maize farmers

1. Introduction of the project

- a. Brief introduction of the project
- b. Experience in maize production
- c. Major constraints of maize production
- d. Major constraints of maize production in the state.

2. Production

- a. Source of inputs (varieties, fertilizers, pesticides, insecticides)
- b. When did you plant this year?
- c. When did you harvest this year?
- d. Years of problem with production

3. Storage

- a. Where do you store maize
- b. How do you store (unshelled or shelled)
- c. Do you put maize in the bags? In barrels? No packaging?
- d. Do you use any other insecticides to store your maize

4. Commercialization of maize seed and products

- a. Do you sell all your maize production?
- b. Where do you sell your maize?
- c. When do you sell your maize?
- d. At what price do you sell your groundnut?
- e. To whom do you sell the products?
- f. Do you set the price you sell?
- g. What causes variation with you
- h. How do you grade your maize

5. Consumption

- a. What proportion of maize do you consume?
- b. What proportion do you keep as seed?
- c. How do you consume maize

6. Information on varieties, fertilizers, pesticides, extension advices

- a. Who is your major source of information regarding varieties?
- b. Who is your major source of information regarding fertilizer?
- c. Who is your major source of information regarding pesticides/ insecticides?
- d. Who is your major source of information regarding extension services?
- e. Who is your major source of information regarding price, supply, and demand?
- f. Etc.

7. Access to support

- a. Do you have access to funds? (Give details)
- b. What problems do small scale farmers face in accessing funds and assistance?

- c. You have an idea how this problem can be solved?

- d. Would you like to form small production cells, clusters and group with other farmers in order to get
 - a. Cheaper inputs
 - b. Lesser transportation of inputs
 - c. Access to improves storage
 - d. Better extension service
 - e. Cheaper farm equipment
 - f. Better prices for commodity etc.

- e. Group formations is not new to you. Why have past group efforts failed.

8. PRIVATE SECTOR MAPPING

In which of the following activities/stages of maize production/ marketing are private sectors involved. (List on card)

S/N	ACTIVITIES/STAGE	YES/NO	LIST OF PRIVATE SECTOR
1	Supply of seeds		
2	Supply of fertilizer		
3	Equipment fabrication		
4	Processing		
5	Loans/credit		
6	Commodity storage		
7	Extension services/ technical information		
8	Distribution		
9	Goods transportation		
10	Industrial processing		
11	Professional Association		
12	Research		
13	Regional/ international markets		
14	Product Branding/ Packaging		

APPENDIX III

INTERVIEW GUIDE (Women in Agriculture)

1. What are the main challenges faced by small scale women farmers in accessing market for their produce
2. What measures has WIA taking in the past to assist resource poor women farmers
3. Whereas many groups have been formed in the past to pool resources, they have not achieve the expected impact on small scale farmers especially women. Why?
4. The study looks at ways of facilitating a thriving partnership between private sector players and small scale farmers- especially the women. How can this be achieved?
5. Do you have genderized maize/ cassava production data in your state
6. What should be the entry point of women small scale into the Agric Value Chain Development
7. What do you consider the critical factors in forging a sustainable partnership between small scale women farmers and identified private sectors players in the maize/cassava value chain.

APPENDIX IV

Focus Group Discussion guide with Cassava farmers

1. Introduction of the project

- e. Brief introduction of the project
- f. Experience in maize production
- g. Major constraints of cassava production
- h. Major constraints of cassava marketing in the region.

2. Production

- e. Source of inputs (varieties, fertilizers, pesticides, insecticides)
- f. When did you plant this year?
- g. When did you harvest this year?
- h. Years of problem with production

3. Storage

- e. Where do you store cassava
- f. How do you store
- g. Do you put cassava in the bags? No packaging?
- h. Do you use any other insecticides to store your cassava

4. Commercialization of cassava and products

- i. Do you sell all your cassava production?
- j. Where do you sell your cassava?
- k. When do you sell your cassava?
- l. To whom do you sell the products?
- m. Do you set the price you sell?
- n. What causes variation with you
- o. How do you grade your cassava

5. Consumption

-
- d. What proportion of cassava do you consume?
 - e. What proportion do you keep as seed?
 - f. How do you consume cassava

6. Information on varieties, fertilizers, pesticides, extension advices

- g. Who is your major source of information regarding varieties?
- h. Who is your major source of information regarding fertilizer?
- i. Who is your major source of information regarding pesticides/ insecticides?
- j. Who is your major source of information regarding extension services?
- k. Who is your major source of information regarding price, supply, and demand?
- l. Etc.

7. Access to support

- f. Do you have access to funds? (Give details)
- g. What problem s do small scale farmers face in accessing funds and assistance?

- h. You have an idea how this problem can be solved?

- i. Would you like to form small production cells, clusters and group with our farmers in order to get;
 - g. Cheaper inputs
 - h. Lesser transportation of inputs
 - i. Access to improves storage
 - j. Better extension service
 - k. Cheaper farm equipment
 - l. Better prices for commodity etc.

- j. Group formations is not new to you. Why have past group efforts failed.

8. PRIVATE SECTOR MAPPING

In which of the following activities/stages of cassava production/ marketing are private sectors involved. (List on card)

S/N	ACTIVITIES/STAGE	YES/NO	LIST OF PRIVATE SECTOR
1	Supply of seeds		
2	Supply of fertilizer		
3	Equipment fabrication		
4	Processing		
5	Loans/credit		
6	Commodity storage		
7	Extension services/ technical information		
8	Distribution		
9	Goods transportation		
10	Industrial processing		
11	Professional Association		
12	Research		
13	Regional/ international markets		
14	Product Branding/ Packaging		

APPENDIX V

A SAMPLE QUESTIONNAIRE FOR PRIVATE SECTOR KEY PLAYERS

1. What is your role in the production to marketing/ export of maize and cassava commodities (tick as many)
 - Wholesaler
 - Inputs supply (seeds, chemical and fertilizers)
 - Equipment fabricator
 - Marketing
 - Processing
 - Credit/ Loan
 - Transporter
2. How long have you operated? _____
3. What are your major services/ product? _____

4. What relationship do you have with maize/ cassava growers ?
 - Direct
 - Contact
 - Intermediary
 - None
5. If in contact with Growers (Maize and Cassava. What category of growers do you do business with mostly).
 - Large scale farmers
 - Medium scale farmers

-
- Small scale farmers
 - Not sure

6. Suggest business strategy to improve the partnership between private sector players like you and small scale farmers _____

7. What percentage of the growers (Maize and Cassava) you relate with are women?

- Less than 10%
- Less than 20%
- Less than 30%
- Less than 40%
- Less than 50%

8. What can be done to increase the number of women growers you relate with?

9. What opportunities exist in doing business with small scale farmers directly?

10. What challenges do you have in working directly with small scale farmers?

11. How can these challenges be overcome?

APPENDIX VI
FGD ATTENDENCE

(BENUE STATE)

CROP: CASSAVA

VENUE : WIAA CONFERENCE HALL MAKUDI

DATE; 15-2-2012

S/N	NAME	ORGANISATION	PHONE/MAIL
1	HELEN UGANLEN	MBAYOAGO CASSAVA PRODUCE	08051440262
2	DORCAS AWA	MBAYOOUGE CASSAVA PRODUCE	07052360130
3	SAMUEL A. DODE	MBAYOUGA CASSAVA PRODUCE	08102470663
4	MHUNGUR ORKUMA	MBAYOUGA CASSAVA PRODUCE	07055666947
5	MOSES WASHAH	MBADUKU CASSAVA	07032481257
6	PHILOMINA ALPE	MBADUKU CASSAVAPRODUCE	08057383232
7	IKPANOR, P.M MRS	MBADUKU CASSAVA	08132792455
8	ORHENE FAVOUR SABINA	WIAA	08025831606,08162146940
9	AMINA EHOCHÉ	WIAA	08035290699
10	NGIZAN CHAHUL	WIAA	08069103018

(BENUE STATE)

CROP: MAIZE VENUE: WIAA CONFERENCE HALLMAKUDI

DATE: 16/02/2012

S/N	NAME	ORGANISATION	PHONE/EMAIL
1	CATHERINA SHIEKA	MBANYOUGA MAIZE PRODUCE	ASSOCIATION
2	HEMBADOON UDE	//	ASSOCIATION
3	GRACE AGENAWNA	//	08080755106
4	GRACE YONGA	//	0815504647
5	EMMAUNEL KILOKO	//	08055246915
6	STEPHEN BELIA	//	08096154101
7	CELINA TENDRO	//	
8	NGIZAN CHAHUL	WIAA	080691030118
9	AMINA EHOCHÉ	WIAA	08035290699
10	MR MSANDRO INYAGH	WIAA	08036274196
11	USOUGH TEMA .S.	WIAA	08189892468
12	ORHENA SABINA.F.	WIAA	08162146940

(OYO STATE)

CROP: MAIZE VENUE: AFAN SECRETARIATE

DATE: 08/ 02/2012

S/N	NAME	POSITION	PHONE/EMAIL
1	CHIFE MRS ARINOLA	WOMEN AGRIC	08126898318
2	AKINTUNDE SAMUEL	MEMBER	08101091677
3	MOSES BABATUNDE FANOSE	MEMBER	08054049868
4	MR ADESHINA ADIGU	SECRETARY	08079917091
5	MRS OLATUNDE OLATUNJI	P.R.O.	088090555558
6	IRIAKA OLAYINKA	MEMBER	08054277555
7	MR YEKEEN OYAMAKIN	MEMBER	08038036976
8	MR BOSE ONIFADE	MEMBER	081233756
9	MR ODEBOWALE MOSES	MEMBER	07068494907

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OYO STATE

Crop: CASSAVA

VENUE: OYO STATE AFAN

S/N	NAME	POSITION	PHONE/EMAIL
1	ENGR OLUMIDE AYINKA	AFAN CHAIRMAN	08026544985
2	MUMIRU OLAGUNJU	VICE CHAIRMAN OYO STATE	08038194355
3	FEMI AYENI	MEMBER	08054144421
4	TESLIM RASAK	MEMBER	0287222
5	ALHAJI F.A. ADEKUNLE	MEMBER	08185054766
6	GANIYAT BADMOS	MEMBER	08073384449
7	PST .A. OMO-OYE	MEMBER	08051948778
8	OYELADU OYEKOVA	MEMBER	08035427811

PLATEAU STATE

CROP: CASSAVA

VENUE: SHENDAM (PLATEAU STATE)

DATE;

S/N	NAME	ORGANISATION	PHONE/EMAIL
1	BAWA TSENLONG	NIG. CASSAVA GROWERS ASSOCIATTION	08031184177
2	PAULINA SHEKARAU	//	08036119194
3	ENGR EMME Y. KWAPNOE	//	08065474621
4	NAANMAN YOLA	//	080366045034
5	YUNUSAABDULLAH	//	08068064194
6	TAIMAKO SARKI	//	08069192326
7	TENGSHAP DONATUS	//	08060499441
8	KWALVE BUBA	//	07036918227
9	TOBIAG	//	

PLATEAU STATE

CROP: MAIZE

VENUE: SHENDAM [PLATEAU STATE]

S/N	NAME	ORGANISATION	PHONE/EMAIL
1	PAUL P. FOUTNAAN	MAIZE GROWERS	08033427045
2	KWAPZEM SULE	//	
3	SUNDAY JOHN	//	08068196103
4	ND KWAPMEN	//	07036969865
5	HELEN RICHARD	//	08133161717
6	HOONNKWAP TUAMLONG	//	08064746686
7	MARY HORLAT	//	08131881470
8	MRS RIFKATU GOTAR	//	07063523288
9	ADAMMU .G. NICODEMOS	//	08065747444
10	SULE SABO	//	07067616578

APPENDIX VII
OGB Nigeria:
Stakeholder Workshop on Market Research & Private Sector Mapping
Abuja March 29th – 30th, 2012

Thursday March 29 th		
Objectives:		
<ul style="list-style-type: none"> - To validate research finding and make inputs into report - Develop strategies for interventions that will ensure markets work for the poor - Create opportunities for dialogue and interactions between Small Scale Farmers and key actors within the agricultural value chains 		
TIME	SESSION	RESPONSIBLE
8.30-9.00	Arrivals & Registration	Boyowa/Agnes
9.00-9.20	Opening Session <ul style="list-style-type: none"> - Introductions - Welcoming remarks - Expectations and objectives - Goodwill messages 	Abdulazeez
9.20-9.45	Context Background <ul style="list-style-type: none"> - Oxfam’s Livelihood and Private Sector Work - Why Cassava & Maize - Gender 	Abdulazeez
9.45-10.15	The Cassava Potentials...	IFDC
10:15-10:45	Private Sector Engagement with SSF Case Study of Ekha Agro Processing LTD	David Okwor
10:45-11:15	TEA BREAK (Group photograph)	
11:15-12:00	Presentation of key findings – Cassava VC Questions and Answers	Dr. Tony Chowwen
12:00-13:00	Way forward: Developing Strategic Interventions <ul style="list-style-type: none"> - Farmer Groups - Marketers - Processors - Input dealers 	Abdulazeez

	<ul style="list-style-type: none"> - Government - Donors 	
13:00-14:00	LUNCH	
14:00-15:30	Group Presentations & Discussions	Dr. Tony Chovwen
15:30-16:00	Private Sector Engagement with SSF Case Study of Ekha Agro Processing LTD	David Okwor
16:00-16:30	Wrap-up for day 1 and Close	Tunde

OGB Nigeria
Stakeholder Workshop on Market Research & Private Sector Mapping
Abuja March 29th - 30th, 2012

Day 2 – Friday 30th		
TIME	SESSION	RESPONSIBLE
08:30-09:00	Recap of day 1	
09:30-10:30	Panel discussion- Market & Value Chain Development Approach	Jamilah
10:30-11:00	Tea Break	
11:00-12:00	Presentation of key findings – Maize VC Questions and Answers	Dr. Tony Chovwen
12:00-13:00	Way Forward: Developing Strategic Interventions <ul style="list-style-type: none"> - Farmer Groups - Marketers - Processors - Input dealers - Government - Donors 	Dr. Tony Chovwen
13:00-14:00	LUNCH	
14:00-15:30	Group presentations and discussions	Gloria
16:00-19:30	General Question & Answers	Abdulazeez
16:30-17:00	Wrap-up & Close	ACD
18:00	Group Dinner	Boyo & Agnes

APPENDIX VIII



For Immediate release:

INCREASED INVESTMENT IN AGRICULTURE AND RESTURCTURING OF STATE AGRIC DEVELOPMENT PROGRAMMES ARE CRITICAL IN IMPROVING FOOD PRODUCTIVITY

Abuja: Key stakeholders in the agricultural sector have urged the government and the private sector to increase public and private investment in agriculture including provision of infrastructure such as Feeder roads, storage facilities, water for rural irrigation so as to ensure Nigeria is food secure and farmers livelihoods is improved.

The key stakeholders, including farmers, processors, fabricators, wholesalers, civil society groups, donors and research institutions attending a 2-day workshop organised by Oxfam recently said most of these ADPs are inefficient and their services do not reach grass root farmers, as a result most of their productivity and income is low, forcing them to remain in poverty despite their hard work.

The workshop which brought together more than 65 stakeholders aimed at presenting research findings carried out in 4 states (Plateau, Nassarawa, Benue and Oyo) different options for adding value to cassava and maize crops. The forum also provided a unique opportunity for the different stakeholders to interact and understand the gaps, bottlenecks and opportunities associated with the agricultural value chains and come up with strategies and interventions that will promote food security and reduce poverty especially among small scale farmers.

At the end of the two day workshop, the participants observed that the production, processing and marketing of maize and cassava is being constrained with numerous challenges which includes:

- i. Inadequate access to inputs (credit, fertilizer, improved seedlings etc),
- ii. Limited information and access to markets
- iii. Lack of infrastructure
- iv. Limited and almost non existing extension services and,
- v. Climate change impacts amongst other environmental related induced impacts

The stakeholders further resolved that in order to resolve these challenges;

- i. The urgent need to reassess and reappraise ADPs, and if need be restructure the role of ADPs' and other similar government agencies in their role as facilitators of extension services at the grass root level.

- ii. In addition, the stakeholders agreed there is a need to enact policies that will encourage women small scale agricultural productivity. Women are pivotal to the rural economies of Nigeria, as food and agricultural producers, processors and traders but the sad reality is that they often operate on the margin of society, due to their low control of inputs and output. These policies will ensure, among other things that production inputs get to the real producers, many of whom are small scale women farmers.

- iii. They also resolved that it is time for the relevant Ministries especially Agriculture, to create more avenues for direct dialogue and inclusion of small scale farmers in its decision frameworks.

On their part, the key players in the agricultural sector committed to replicate learning, by creating a network of community based farmer volunteers where communities nominate farmers to be trained on basic farming and post harvest techniques and in turn, they train their cooperative members. In the addition, the stakeholder agreed to support farmers to organise themselves into a cohesive, purposeful cooperative groups that will give them a voice and platform for accessing inputs and markets came out strongly.

The workshop was organised as part of Oxfam's' strategy under its livelihood & Private Sector Programme to increase investments in sustainable small holder agriculture particularly for women. This is meant to enhance value chain development towards improving the livelihoods of rural farmers and facilitation of their contribution in modern supply chains and increase their access to markets.

Notes to the Editor:

About Oxfam

Oxfam is an international development, relief, and campaigning organisation that work with others to find lasting solutions to poverty and suffering around the world. The Nigeria country program was

established in December 2001 as Agriculture Support Programme (ASP), within the context of livelihoods, and with a focus on small small-scale farmers in particular

About VFS

Voices for Food Security-GROW campaign is a coalition of civil society organisations (CSOs) and small scale farmer associations across the country. The goal of the Campaign is to promote a fair and equitable food system for every Nigerian to have enough to eat at all times.

For more details please contact

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Abdulazeez Musa, Livelihoods & Private Sector Coordinator – amusa@oxfam.org.uk 08024697713

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