



Market Access and Value Chain Analysis of Nigeria Ginger and Shea Butter as Potential Geographical Indication Products under the Zero-Oil Plan of the Federal Government of Nigeria.



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About the Funder

The Export Expansion Facility Programme (EEFP) is a scheme under the Nigerian Economic Sustainability Plan of the Federal Government of Nigeria and managed by the Nigerian Export Promotion Council (NEPC). The EEFP aims to protect export businesses from the effects of the COVID-19 pandemic, safeguard jobs, de-risk the economy from shocks from the COVID-19 pandemic and increase Nigeria's export capacity in the near term and its export volumes in the medium term.

The facility provided monetary stimulus packages to help revive not only the SMEs, but also big corporations in the non-oil export sector, which fall within the context of the Export Incentives and Miscellaneous provisions Act CAP E19 Laws of the Federation, 2004. The Act stipulates that the Funds, especially (Export Development Fund and Export Adjustment Scheme Fund), shall be used to provide financial assistance to exporting companies to cover their expenses in respect of export promotion activities.

The NEPC is the Federal Government of Nigeria's apex institution for promoting, developing and diversifying non-oil exports. NEPC has, over the years, worked to achieve its mandate by coordinating and harmonising non-oil export development and promotion activities in the country, taking the lead in all national non-oil export programs, and interfacing with international trade agencies on cooperation and capacity building.

The EEFP approved programmes in the Implementation Work plan are captured under five work streams: Capacity Building, Financing, Market Development, Infrastructure and Institutional Strengthening. In view of the NEPC and EEFP mandate, through this study, "Market Access and Value Chain Analysis of Nigeria Ginger and Shea Butter as potential Geographical Indication products (GIs) under the Zero-Oil Plan of the Federal Government of Nigeria.", the NEPC/EEFP is poised to support an institutional framework for promoting and protecting potential GIs in Nigeria as non-oil export.

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Foreword

This study on "Market Access Analysis of Nigerian Ginger and Shea butter as potential Geographical Indications (GIs) Products under the Zero oil plan of the Federal Government of Nigeria" presents a compendium on the perspectives of buyers and sellers of both products. It also brings to the fore the inherent qualities of the two products, which are unique to Nigeria environment and therefore qualify them as products of Geographical Indications (GIs). The African International Trade and Commerce Research (AITCR), has therefore succeeded in opening the eyes of stakeholders in the Ginger and Shea-butter value chain on the benefits of premium pricing accruable to these products, which possess all the unique features for registration as Geographical Indications. The significance of this proposition is that export of GIs-certified products can generate much more income than generic commodity export. Therefore, the long term benefits to the individual, community and the nation at large cannot be over-emphasized.

In addition to this, the research lays bare the inadequacy of legal regimes regulating Trademarks to protect GI products given their special economic, international trade and investment characteristics, thus making it necessary to have a dedicated legal regime for GIs in Nigeria. The research, therefore, posited that Geographical Indications stretches beyond Trademarks as it is more useful in indicating the geographical origin of the product it protects. Thus with an Act protecting GIs, it will curb or eliminate the current trend where Benue yam in Nigeria is transported to Ghana, labelled as Ghana yam and then exported to the International market.

The need for a law protecting GI in Nigeria can, therefore, not be overemphasised. This explains why the Nigerian Export Promotion Council supported AITCR through its Export Expansion Facility Grant to conduct this study.

It is, however pertinent to note that Geographical Indications(GIs) is not limited to products but also extend to ancient sites and monuments which are found in many states in Nigeria.

This study is, therefore, a wake up call for us to catalogue our Products, Sites and Monuments and then take the appropriate steps required to register them under an accredited GI system acceptable for international trade and investment. To achieve this, all hands must be on deck.

While the NEPC is willing and ready to take the lead, an inter-agency collaboration is germane to ensuring the protection of GIs in Nigeria. The time to act is now.



Dr Ezra Yakusak

Executive Director/Chief Executive Officer
Nigerian Export Promotion Council

Table of Contents

Disclaimer	i	5.2.1 Productive uniqueness based on longevity of existence	14
About the Funder	i	5.2.2 Generic property of the product	14
Acknowledgement	ii	5.3 Experience of the value chain players	15
Foreword	iii	5.3.1 Product planting and gestational cycle	16
Executive Summary	ix	5.3.2 Distribution based on the gestation period of the product	16
1.0 Introduction: Shea Butter and Ginger Value-Chain as Potential Geographical Indications for Nigeria	1	5.3.3 Distribution based on harvest period of the Product	17
2.0 Rationale of the Study	4	5.3.4 Product Average shelf life	18
3.0 Objectives of the Study	6	5.3.5 Analysis of respondents' production capacity	18
4.0 Methodology	6	5.4 Analysis of product Demand in local and International Market	19
4.1 Quantitative and Qualitative Research	6	5.4.1 Distribution based on number of regular customers/buyers	20
4.2 Desk Review	6	5.4.2 Distribution based on highest one-time quantity sold	21
4.3 Structured Surveys	7	5.4.3 Distribution of comparative demand of unique product compared to close substitute	22
4.4 Sample frame/size	7	5.4.4 Analysis of period with the highest demand	22
4.5 Data Analysis and Reporting	7	5.4.5 Analysis of Annual Sales volume of Ginger and Shea butter	23
5.0 Data Analysis & Interpretation	8	5.4.6 Analysis of the rate of the demand for your product locally	23
5.1 Respondents' Background Information	8	5.4.7 Analysis of the demand for Ginger and Shea butter internationally	24
5.1.1 Product Line Distribution	8	5.4.8 Analysis of Nigeria Ginger and Shea butter uses	25
5.1.2 Product Categorisation	8	5.4.9 Analysis of major buyers of Nigeria Ginger and Shea butter by rank	26
5.1.3 Role in relation to the Product	9		
5.1.4 Respondent Gender Distribution	10		
5.1.5 Percentage Distribution by Respondents' Employees	11		
5.1.6 Percentage Distribution by Respondents' Business Registration Status	13		
5.2 Descriptive Analysis of the product Uniqueness	14		

5.5 Descriptive Analysis of Nigeria Ginger and Shea butter value chains	27	5.9.3 Analysis of export earnings increment over time	42
5.5.1 Process involved in the production of the product	27	5.9.4 Analysis of export earnings increment over time	44
5.5.1a Ginger Production Process	27	5.9.5 Opportunity to export the product to the International Market	45
5.5.1b Shea-butter Processing chain	28	5.9.6 Analysis of Export Challenges	45
5.5.2 Distribution based on the locality of preservation	31	5.9.7 Analysis of Shea Butter competition	46
5.5.3 Longevity of the traditional process of production.	33	5.9.8 Shea butter Mandatory Conformity Assessment Programme (MANCAP) Analysis of Shea Butter competition	47
5.5.4 Conformity with international best practices.	33	5.9.9 Analysis of Ginger Competition	48
5.6 Descriptive Analysis of Market and Pricing strategy	34	5.9.10 Analysis of Ginger Conformity with Standards	48
5.6.1 Analysis of period with highest Sales.	34	5.10 Analysis of ginger and shea butter Customer Behaviour	49
5.7 Distribution-based association related to your product	35	5.10.1 Analysis based on Consumption Level	49
5.7.1 Distribution based on mode of transportation	35	5.10.2 Analysis of Customer Level of Appeal	50
5.7.2 Distribution based on challenges during transportation	36	5.10.3 Analysis of the Determinant of Customers Patronage	50
5.7.3 Distribution of form of support for your business	36	5.10.4 Analysis of Customers based on readiness for Premium Pricing	50
5.7.4 Distribution of based on nature of Support received	37	6.0 Conclusion & Recommendations	52
5.8 Presentation of Profitability Analysis of Ginger and Shea Butter	37	Endnotes	55
5.8.1 Distribution based on the period of highest profitable	38	Appendices	58
5.8.2 Analysis of most profitable customers	39	List of Figures	
5.8.3 Margin is your Cost of Production less than or greater than your Revenue	39	Figure 1: Respondents' Distribution by Product Line	8
5.9 Analysis of Exporters' performance	41	Figure 2: Distribution by Product Description	9
5.9.1 Analysis of Export Frequency	41	Figure 3: Distribution based on respondent role in relation to the product	9
5.9.2 Analysis of existing regular market for Ginger and Shea butter	42	Figure 4: Graphical Distribution of Respondents by Gender	10

Figure 5: Graphical Distribution of Respondents Highest Education Qualification	11	Figure 25: Representation traditional knowledge involved in the production	28
Figure 6: Percentage Distribution by respondents' employees	12	Figure 26: Source: AITCR 2022 Adapted from Ginger value-chain based on field study	29
Figure 7: Percentage Distribution by respondents' business registration status	13	Figure 27: Source: AITCR 2022 Adapted from Shea butter value chain based on field study	30
Figure 8: Distribution based on Productive uniqueness based on longevity of existence	14	Figure 28: Graphical illustration based on locality of preservation	31
Figure 9: Distribution based on geographically linked differences	15	Figure 29: Representation of longevity of traditional knowledge.	33
Figure 10: Distribution-based best period for planting the product	16	Figure 30: Graphical illustration of conformity Level with international best practices.	33
Figure 11: Distribution based on the gestation period of the product in weeks	16	Figure 31: Graphical illustration of period respondents make highest sales	34
Figure 12: Distribution based on harvest period of the Product.	17	Figure 32: Graphic distribution of membership of the association	35
Figure 13: Distribution based on average shelf life of the product	18	Figure 33: Graph of mode of transportation for the product	35
Figure 14: Distribution by respondents' scale of production	19	Figure 34: Distribution based on challenges during transportation.	36
Figure 15: Distribution based on number of regular customers/buyers	20	Figure 35: Graphic Representation of distribution form of support for your business	36
Figure 16: Distribution based on highest one-time quantity sold	20	Figure 36: Graphical Representation of distribution form of support for your business	37
Figure 17: Graphical Distribution of comparative demand of unique product compared to close substitute.	21	Figure 37: Distribution based on a respondent most profitable period(s) of the year to sell your product	38
Figure 18: Graphical Analysis of the period with the highest demand.	22	Figure 38: Analysis of most profitable customers	39
Figure 19: Graphical Analysis of Annual Sales volume of Ginger and Shea butter	23	Figure 39: Margin on cost of production less than or greater than revenue	40
Figure 20: Graphical Analysis of rate of the demand for your product locally	24	Figure 40: Distribution of export capacity	41
Figure 21: Graphical representation of rate the demand of Ginger and Shea butter internationally	24	Figure 41: Distribution of export frequency	42
Figure 22: Graphical representation of respondents' assertion of product use	25	Figure 42: Graphical Distribution of respondents based on the existence of a regular market for the unique product	42
Figure 23: Graphical represent major buyers of Ginger and Shea-butter by rank	26	Figure 43: Have export earnings increased in recent times?	44
Figure 24: Shea Butter stages of production	28		

Figure 44: Graphic Distribution opportunity of export to the International market	45
Figure 45: Percentage distribution based on export challenges	46
Figure 46: Graphic Distribution based on shea butter competition in the international market.	46
Figure 47: Percentage distribution of MANCAP	47
Figure 48: Percentage distribution certified organic for its premium quality and grade.	48
Figure 49: Percentage distribution based on competition	48
Figure 50: Percentage distribution-based Ginger conformity with standard.	48
Figure 51: Percentage distribution based on respondent awareness of certifications for the Agricultural Sector.	49
Figure 52: Distribution based on frequency of consumption	49
Figure 53: Distribution based on customer product preferred state for consumption	50
Figure 54: Graphic Distribution of respondents based on patronage drivers	50
Figure 55: Premium price due to the uniqueness of the product.	51

Acronyms and Abbreviations

AfCFTA	African Continental Free Trade Area
AITCR	Africa International Trade and Commerce Research
GIs	Geographical Indications
IP or IPR	Intellectual Property (Rights)
ISO	International Organization for Standardization
NEPC	Nigeria Export Promotion Council
OECD	Organisation for Economic Co-operation and Development
PDO	Protected Designation of Origin (EU)
PGI	Protected Geographical Indication (EU)
TRIPS	Trade-Related Aspects of Intellectual Property Rights
WIPO	World Intellectual Property Organization
WTO	World Trade Organization

Glossary of Terms

AO – Appellations of origin

The Lisbon Agreement for the Protection of Appellations of Origin and their International Registration 1958, as amended in 1979 (Lisbon Agreement), in article 2(1), defines Appellations of Origin as “the geographical denomination of a country, region, or locality, which serves to designate a product originating therein, the quality or characteristics of which are due exclusively or essentially to the geographical environment, including natural and human factors”.

Certification mark

A certification mark is any word, name, symbol, or device that signals the registered certification of a product’s quality characteristics, which may include the geographical origin. It conforms to specifications laid out by the owner, which can apply to the place of origin and/or methods of production. Use of the mark requires some verification by the owner that prescribed attributes have been met or are presented. Unlike trademarks, certification marks are source-identifying in that they identify the goods’ nature and quality and affirm that they have met certain defined standards.

Collective mark

Collective marks are used only by the members of a cooperative, association or other group to identify their goods or services as having a connection to the collective and its standards. The collective mark may or may not have a geographic identity, and may advertise or promote goods produced by its members, but does not sell its own goods.

GI – Geographical Indication

The World Trade Organization’s Agreement on Trade-Related Aspects of Intellectual Property Rights (TRIPS Agreement), in article 22(1) defines Geographical Indications as “indications which a good as originating in the territory of a Member, or a region or locality in that territory, where a given quality, reputation or other characteristic of the good is, essentially, attributable to its geographical origin”.

IPR – Intellectual Property Rights

Intellectual property rights are intangible or incorporeal rights conferred by law on human innovators and creators, and even entrepreneurs to protect the fruits or products of their intellect, innovative and creative efforts, commercial reputation, and goodwill. The rights are conferred by law in order to promote creativity, innovation and societal good. Intellectual property rights include rights relating to literary, artistic, scientific works, performances of performing artists, phonograms and broadcasts (copyright and related rights), inventions in all fields of human endeavours and scientific discoveries (patent, plant and animal breeders’ rights), industrial design, trademarks, service marks, commercial names, designations of origin (appellations of origin and geographical indications), protection against unfair competition, among others.

Terroir

This is a delimited geographical area where a human community has developed, over the course of history, a collective production method and expertise. A terroir is based on a system of interactions between the physical and biological environment (milieu) and a set of human factors involved to convey originality, confer typicality and engender a reputation for a product.

Executive Summary

Nigeria exports different goods considered as distinct traditional goods as raw materials, with the price set by the equilibrium price on the global market, including shea butter and ginger. Despite the fact that they support local socioeconomic dynamics by generating jobs, household income, and production, potential GI goods exist in Nigeria but have not been categorised or officially acknowledged. According to literature, protecting products under GI systems leads to larger economic rewards for producers, quality production, and more equitable distribution of revenues. The Africa International Trade and Commerce Research (AITCR), with a grant from Export Expansion Facility Programme (EEFP), conducted a market access and value chain analysis study for ginger and shea butter as potential GI products under the Zero Oil Plan policy framework.

The study used both quantitative and qualitative research methods. Insights from shea butter and ginger producers and consumers were the main focus of the quantitative approach. The semi-structured qualitative interviews explored historical perspectives, barriers to market, opportunities and challenges, and the distinctive qualities of shea butter and ginger to gain a deeper understanding of the producers, exporters, and domestic consumers of shea butter and ginger as potential GI products. Data from the desk review provided the necessary perceptions to design the fieldwork instrument, theoretical framework, and specific literature relating to the export of GI products. The data was disaggregated by location, product type, and profile. The study raises awareness and provides information about the GI potential of Nigerian shea butter and ginger. Additionally, the report offers recommendations based on actual data demonstrating the viability of shea butter and ginger exports.

GINGER VALUE CHAIN

Key findings



- Respondents dealing in Class 1 ginger represented 61 percent of the total ginger respondents, while 25 percent dealt in Class 2 ginger. Only 14 percent of ginger respondents are involved in the extra class.
- The largest percentage of respondents in the ginger value chain are farmers, accounting for 48 percent of the total respondents.
- 94 percent of respondents said the average shelf life for Nigerian ginger is 2 years.
- The vast majority of ginger respondents (48 percent) have between 11 to 20 major buyers.
- 61 percent of ginger respondents across the value-chain affirmed that it has very high demand compared with close substitutes.
- 90 percent of ginger producers' annual sales volume exceeds 500kg.
- In the domestic market, 44 percent of ginger respondents said demand was reasonably high.
- Conformity with global standards was rated as very high by 44 percent of ginger producers.
- 66 percent of ginger respondents said their location was very accessible.
- 72 percent of ginger respondents are not members of any association
- 93 percent of ginger respondents asserted never to have received assistance from any organization.
- Based on the volume of purchases reported by 50 percent of ginger respondents, large processors were the most profitable consumers of ginger.
- The study found that 56 percent of exporters export between 101 and 500 tons of ginger per annum.

- 93 percent of ginger respondents asserted never to have received assistance from any organization.
- Based on the volume of purchases reported by 50 percent of ginger respondents, large processors were the most profitable consumers of ginger.
- The study found that 56 percent of exporters export between 101 and 500 tons of ginger per annum.
- 80 percent of respondents in the ginger value chain indicated that they needed financial support to improve their business.
- According to 94 percent of ginger exporters, there is a high market demand for the product.
- 69 percent of ginger exporters found out about the opportunity through family or friends.
- 56 percent of ginger exporters asserted that cumbersome export procedures were the most difficult challenge, limiting their ability to export.
- 58 percent of ginger consumers preferred the products in their traditional processed form.

SHEA BUTTER VALUE CHAIN

Key findings



- Across all respondent categories, 66 percent of Shea butter respondents sell unrefined shea butter.
- The largest percentage of the shea butter value chain respondents are farmers, accounting for 39 percent.
- 75 percent of respondents affirmed that the average shelf life of shea butter is two years.
- The majority of shea butter respondents, which represent 31 percent, have between 11 and 20 major buyers
- 23 percent of shea butter respondents across the value-chain affirmed that it is in high demand compared with a close substitute in the international market.
- 67 percent of shea butter producers' sales volume exceeds 500kg.
- Domestic demand for shea butter was rated as high by 52 percent of shea butter respondents. Local marketers were ranked as the top major buyer by 27% of shea butter producers..
- 40 percent of shea butter producers ranked conformity with global standards as average conformity.
- 49 percent of shea butter producers and marketers affirmed that their location was highly accessible to the physical market.
- 69 percent of shea butter producers and marketers are unaffiliated.
- 87 percent of shea butter respondents asserted that they have never received assistance from any organization.
- Big processors were the most profitable shea butter consumers,, accounting for 39 percent of shea butter respondents.
- The largest proportion of shea butter exporters accounted for 33 percent of annual exports of 1 to 10 tons.
- 85 percent of shea butter respondents said they need financial assistance to grow their business.
- 84 percent of shea butter exporters confirmed that there is an existing regular market for the product.
- 74 percent of shea butter exporters claimed to have increased their export earnings in recent times.
- 25 percent of shea butter exporters representing the dominating proportion, learnt about the opportunity to export to overseas markets through business associates.
- Packaging, branding, and labeling issues were reported by 37 percent of shea butter exporters as the most difficult challenges, among others.
- 68 percent of shea butter consumers preferred the product in its traditional form.

1.0 Introduction: Shea Butter and Ginger Value-Chain as Potential Geographical Indications for Nigeria

A geographical indication (GI) is a sign used on products with a specific geographical origin and possess qualities or a reputation due to that origin within the framework of Intellectual Property Rights (IPRs). Due to their territorial reliability and source of origin, GIs have been historically recognised and used to secure the link between quality, the name of a geographical area, and the preservation of local cultural practices and traditional knowledge in the production value chain of non-oil goods. The number of products bearing a GI has increased steadily in recent years. The European Union (EU) Commission considers GIs a useful tool for fostering high-quality food production and rural development in less-favoured regions.¹ In order to function as a GI, a sign must identify a product as originating in a given place. A GI product provides revenue and pride to millions of producers and MSMEs worldwide. These products play a vital role in the sustainable development of local communities.

Historically, appellation of origin was the earliest form of GI, and it was first mentioned in article 1(2) of the Paris Convention for the Protection of Industrial Property (1883), as amended in 1979 (Paris Convention). This was complemented by the Madrid Agreement for the Repression of False or Deceptive Indications of Source of Goods (1891), which required the seizure of imported goods bearing false or deceptive indications of origin among member states. The Parties to the Lisbon Agreement for the Protection of Appellations of Origin and their International Registration in 1958, as amended in 1979 (Lisbon Agreement), were the first to formally agree to create a single international registration system for Appellations of Origin. The Lisbon Agreement was revised by the Geneva Act of the Lisbon Agreement on Appellations of Origin and Geographical Indications of 2015 (Geneva Act). The Geneva Act extends the Lisbon Agreement to all forms of GI to better cater for all existing regional and national mechanisms for the protection and exploitation of products whose qualities are linked to their origins or geographical area. The World Trade Organization's (WTO) Agreement on Trade-Related Aspects of Intellectual Property Rights (1994) (TRIPS Agreement), a comprehensive IPR treaty, introduced the protection of GIs within the context of international trade. Nigeria is a party to and has ratified the Paris Convention and the TRIPS Agreement.





There is currently no international legal instrument for the protection of GIs under the framework of the African Union. However, plans are underway to develop a continent-wide legal instrument to protect GI: This is gleaned from the Continental Strategy for GIs in Africa, which “provides the roadmap for the African Union Commission (AUC) and provides a collaborative opportunity with the African Intellectual Property Organization (OAPI), the African Regional Intellectual Property Organization (ARIPO), RECs, member states, and key stakeholders of the strategy, to facilitate the development, promotion, and protection of GIs in Africa”. The Continental Strategy for GIs in Africa “will be completed by the African GI Action Plan that will define further activities and products and establish the final logical framework with a timeline, priorities and resources”.³

There is also no current legal framework for the protection of GIs in Nigeria. There are, however, arguments that GIs can be protected as certification marks under the Trademarks Act, Cap T13, Laws of the Federation of Nigeria, 2004. Nonetheless, the strength of the certification mark framework under the Trademarks Act to protect GIs, given their special economic and international trade and investment characteristics, makes it a national imperative to have a dedicated legal regime for GIs in Nigeria. Moreover, a further challenge concerning the use of certification marks to protect GI in Nigeria is that descriptive marks (as to the nature or geographical origin) of goods are generally prohibited from registration under the Trademarks Act. On the contrary, GIs are useful for indicating the geographical origin of the goods it protects.⁴ These challenges with the use of the Trademark system is what informs ongoing work to develop a dedicated legal regime for GI protection in Nigeria with support from the EU.

Interestingly, Nigeria is rich in traditional and cultural heritage products that are geographically linked with genetic resources that can derive many benefits and gain from the protection of GIs. It has been argued that Nigeria has thousands of potential GI products, but some of them have been misappropriated to have come from other regions due to a lack of adequate protection. For instance, Benue-yam (which is misappropriated and rebranded as Ghana yam in overseas markets) and Sokoto red goatskin (misappropriated as Morocco leather).

The Nigerian Export Promotion Council (NEPC) has highlighted in the "Zero Oil Plan" agenda the targets of boosting non-oil exports and earning \$150 billion from this source over the next 10 years by generating 500,000 jobs annually and lifting at least 20 million Nigerians out of poverty through increased production and export activities. Market access is key to achieving the "Zero Oil" Agenda, and GI protection will be a crucial driver of the entire value chain for unique tradable goods that derive their unique reputation and characteristics based on the soil, climate, local know-how and traditional heritage. GI protection will cover production, culture, associated services, including standards and conformity/compliance, and the market, including market entry rules.

The past few years have witnessed an increased interest in products classified as GI, and most of the 22 Zero Oil plan products are potential GIs products. Many of the communities involved in the products' production processes and practices have claimed ownership of what they consider to be the quality and reputation of the product, which is commonly ascribed to the community of origin. Despite the reputation and quality of these products, the lack of support kept denying the Nigerian economy benefits that should have accrued from the products because of their unique characteristics. The economic benefit of these products to Nigeria cannot be over-emphasised if they are prioritised. The GI approach will benefit the government in terms of revenue because Nigeria will control the global market price of these products, and it will directly impact the livelihood of local producers.

Furthermore, research findings reveal that most developed and developing countries have designed frameworks to protect GIs products.⁵ For example, the European Union possesses the most extensive and most diverse portfolio of GIs. Most European countries grant at least symbolic protection to GIs, and these protection systems remain relatively new in many countries around the world. The EU

Commission study published in 2019 revealed that the value of GIs from agriculture, food and drink alone, whose names are already protected in the EU, was worth 74.8 billion euros in 2017,⁹ and almost one-fifth of that amount was generated from exports outside the European Union. The study further establishes that the sales value of products associated with GIs is, on average, double that of similar products without a GI certification.



Source: AITCR Survey 2022

2.0 Rationale of the Study

Commercially successful GI products do not just emerge; they are the outcome of a thorough, deliberate, and strategic process. The export of GI products can generate more income than generic commodity exports. In most jurisdictions, government institutions take full responsibility for assessing and supporting the regulatory framework for GI. For example, Kampot pepper in Cambodia had huge growth and became a premium commodity due to its GI protection status. Within a decade, the demand and price of the Kampot pepper grew by over 800%.¹⁰

Literature shows that the protection of products under the GI protection systems results in higher economic gains for producers, fostering quality production and a better distribution of profits.¹¹ GI protection has wider positive benefits for the local communities. If a GI product is rightly protected, it will benefit the local communities, and most of the time, it will also benefit from international protection in other countries. The outcome of related studies reveals that the sales value of a product with a protected name is, on average, double that of a similar product without a protected name.¹²

Nigeria is known to export most of its unique traditional products, such as shea butter and ginger, as raw commodities, whose prices are determined by the international market commodity prices. Potential GI products, such as ginger and shea butter, already exist in Nigeria, which is rooted in particular territories. They have not been scientifically identified or officially recognized, even though they contribute to local socio-economic dynamics, creating local jobs and household income and promoting the diversity of production. Moreover, the concept of GI, as well as its potential to enhance the import values of products such as Nigerian ginger and shea butter, is little known to national and sub-national governments (Ministries of Finance, Planning, Agriculture, Trade, etc.) It is even less known to local producers and professional agricultural organizations or associations. In Nigeria, efforts at developing GI protection systems are just at the embryonic stage, and government officials in relevant institutions in the past have had limited knowledge about GIs or how to protect foreign ones.

It is worth noting that Shea butter and ginger production are carried out in different locations across Nigeria. Niger State is considered the largest producer of Shea Butter in Nigeria.¹³ Shea is a very important cash crop for rural women in many local communities. According to the United Nations Industrial Development Organization (UNIDO), about 3 million women are involved in one way or another in the shea butter value chain. The practice and knowledge of the products have become a tradition for many localities, contributing to the quality and reputation of the product in the international market. There is an increasing demand for shea butter in the European cosmetics market. Shea butter is a versatile ingredient with many applications in the cosmetics industry. The main driver is the increasing demand for natural and organic cosmetics in the European market. It is expected that the demand for shea butter will continue to rise in Europe.¹⁴ According to the Food and Agriculture Organization's (FAO) statistics, Nigeria was the largest producer of shea nuts in 2018. Most of the shea butter produced in Nigeria is for domestic consumption.¹⁵ There is also an undocumented trade in shea nuts across Nigeria's borders with Benin, Togo and Ghana. This study also verified this claim as most of the shea butter producers claimed not to be exporting the product but rather selling it to buyers in different parts of the country that use the land border to transport the product to neighbouring countries. Europe is the main export destination for Nigeria's shea products. It is estimated that around 250,000 tons of shea products are exported to Europe annually. Finished cosmetic products with shea butter content are also exported from Europe to Africa. The Nigerian Shea butter sector has the potential to generate wealth and employment for a large number of people at the same time.

Through the Nigerian Export Promotion Council (NEPC), the Federal Government has trained 200 women entrepreneurs from across the country on the shea-butter value chain.¹⁶ Even though we consider this effort encouraging, it is expected that more technical and financial intervention should be channeled to the shea butter sector to create an enabling environment to industrialize the industry.

Furthermore, Nigeria has a 14% share in the global production of ginger and is projected to grow at 6% per annum, and the value chains are underdeveloped. In addition, Nigerian ginger has unique strengths and is considered among the best globally. With over 523,000 metric tons produced annually, Nigeria is among the world's largest producers of ginger.¹⁷ Around 90% of ginger production is exported as raw or semi-raw material. Nigerian ginger stands out because of its pungency and high level of oleoresin oil, the active ingredient most people look for in ginger. Its uniqueness makes it a sustainable GI candidate that will benefit producers and Nigeria in the international market. This study is timely and strategic because of the numerous socioeconomic benefits the rural communities, non-oil export sub-sector, and Nigeria will derive from its implementation.

Against the foregoing backdrop, and the plethora of potential benefits and opportunities available for the protection of GI in Nigeria and the need to help establish an enabling environment for the formulation of extant laws relating to the protection of GI in Nigeria while also bridging the obvious gaps in the literature on GI development in Nigeria, the Nigerian Export Promotion Council (NEPC) has commissioned the Africa International Trade and Commerce Research (AITCR) to conduct market access and value chain analysis for ginger and shea butter as potential GI products under the Zero Oil Plan policy framework. Accordingly, the main rationale for this study is to record the uniqueness of Shea Butter and Ginger from producers' and consumers' perspectives. Secondly, the study creates awareness and knowledge about the GIs potential of Shea butter and Ginger from Nigeria. Thirdly, the study presents the authenticity of the export of Shea butter and Ginger.



Source: AITCR Survey 2022

3.0 Objectives of the Study

The primary objectives of this study are to provide an overview of the importance of GI to traditional products in Nigeria, with a specific focus on Nigerian Shea butter and Ginger, as well as to raise public awareness about the importance of GI to sustainable national economic development and the empowerment of rural communities, particularly those involved in the production of shea butter and ginger in Nigeria. In particular, the study aims to:

1. Identify and evaluate the unique qualities/characteristics of Shea butter and Ginger as GI products in Nigeria.
2. Identify and examine the value chains of Shea butter and Ginger as potential GI products in Nigeria,
3. Analyze and understand the economic status of the Shea butter and Ginger value chains under the NEPC Zero-Oil Plan.

4.0 Methodology

4.1 Quantitative and Qualitative Research

Quantitative and qualitative research techniques were adopted for this study. The quantitative approach focuses on drawing insights from producers and off-takers of Shea butter and Ginger under the Zero Oil Plan. The structured questionnaire for the quantitative technique was designed to capture and document participating producers and off-takers' experience, support system, unique characteristics, reputation, support mechanism, standard and certification requirements, geographical location, and other pertinent issues that either encourage or discourage market access. The qualitative interviews were semi-structured and probed the historical understanding, market access challenges and opportunities, and the unique characteristics of shea butter and ginger for a deeper descriptive view of producers, exporters, and domestic consumers of shea butter and ginger as potential GI products.

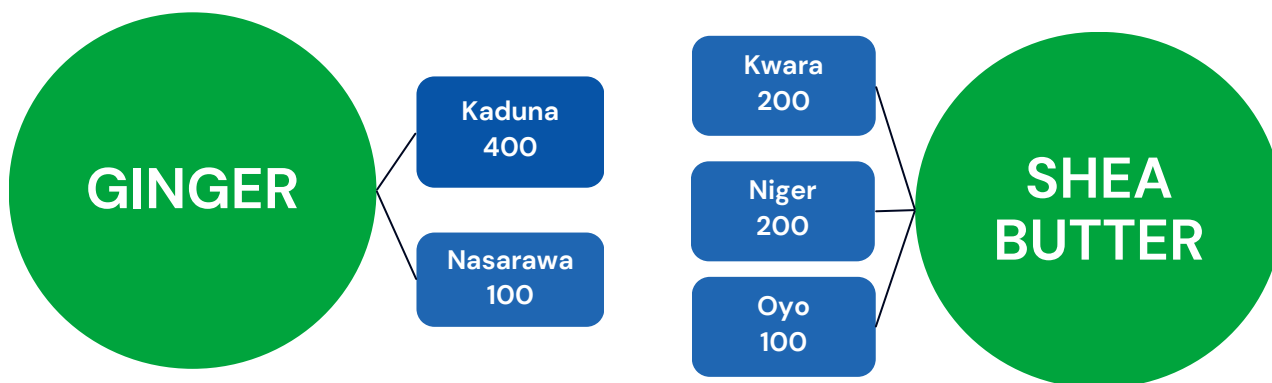
4.2 Desk Review

In order to complement the data gathered from the field research, in-depth desk research was conducted on existing publications, articles, and policy briefs on GIs. Data from the desk review provided the necessary insights to design the instrument for the fieldwork, theoretical framework, and specific literature relating to the export of GI products globally. The desk review relied on credible data and information from online publications; the government published data; as well as existing data from studies from other jurisdictions.

4.3 Structured Surveys

The survey assessed their knowledge of a typical product, historical understanding, and their interest in such a product identified and linked to the geographical origin, including the potential for the development of the GI and market access.

4.4 Sample frame/size



4.5 Data Analysis and Reporting

Responses from the field were analysed and reported using a combination of descriptive and non-descriptive methods such as counts, means, and percentages, and cross-tabulation of key metrics using EXCEL and the Statistical Package for the Social Sciences (SPSS). The data presentation contained in this report was disaggregated by location, product type, and profile. Qualitative data were collated and analysed using a deductive approach.

5.0 Data Analysis & Interpretation

This section of the report employs descriptive statistics and trend analysis to give meaning to the data collected from the respondents. The findings from the survey capture the qualitative and quantitative answers in order to obtain inclusive insights for recommendations.

5.1 Respondents' Background Information

5.1.1 Product Line Distribution

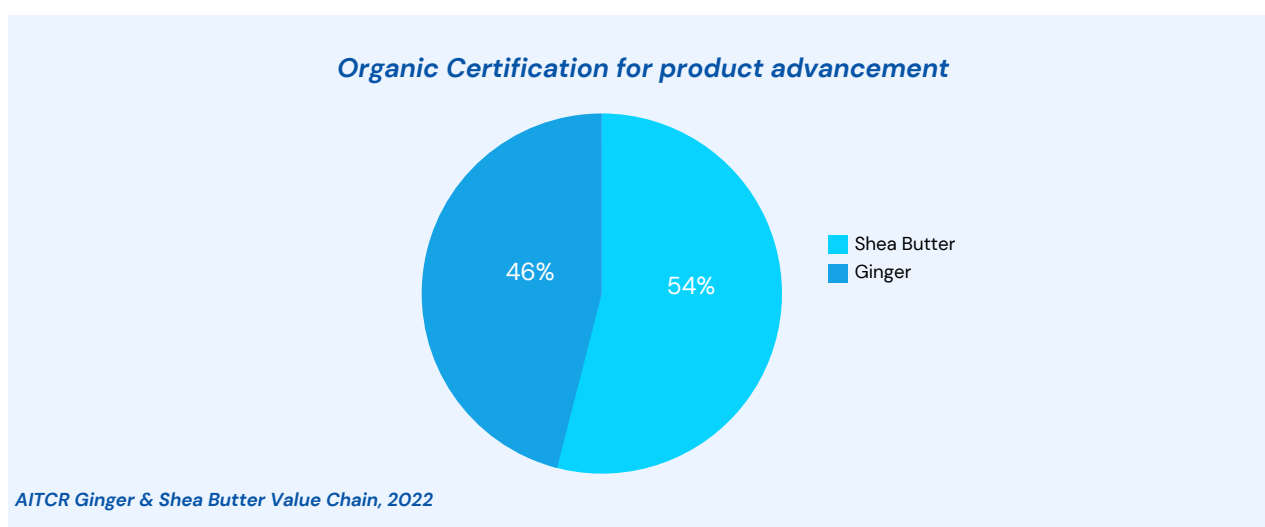


Figure 1: Respondents' Distribution by Product Line

The data distribution represented in figure 1 reveals that 54 percent of the respondents were cut across the Shea butter value chains, while 46 percent of the respondents cut across the Ginger value chains. This outcome was based on the number of locations covered during the study. For Shea butter, the following states were the participating states: Oyo, Niger, and Kwara states, while for ginger, data gathering was from Kaduna, and Nassarawa. These were the valid responses obtained from the field after necessary data cleaning.

5.1.2 Product Categorisation

Shea butter is an ivory-coloured fat extracted from the nut of the African shea tree, which comes in 3 major forms; namely refined, unrefined, and ultra-refined Shea butter. They vary in colour and scent, with different health and nutritional benefits.⁸ Ginger comes in 3 major classes. There is the "Extra" Class which is the ginger of superior quality. This class of Ginger is typified by clean roots, well-shaped and free from defects, except for very slight superficial imperfections, provided this does not affect the general appearance of the produce, the quality, the preservation quality, and package presentation. Class 1, which is the second category, is of good quality, characterized by firm roots without evidence of shriveling or dehydration and without evidence of sprouting. Although slightly defective, it must not affect the general appearance of the product quality, the preserved quality, and the presentation in the package. Class 2 is of the lowest quality compared with the first two classes but satisfies the minimum required standards ranging from wholeness, firmness, soundness, free from visible foreign matter, and practically free from damage and pest attacks. The distribution of respondents based on the description would determine the extent of the commercial viability of the product in the international market.

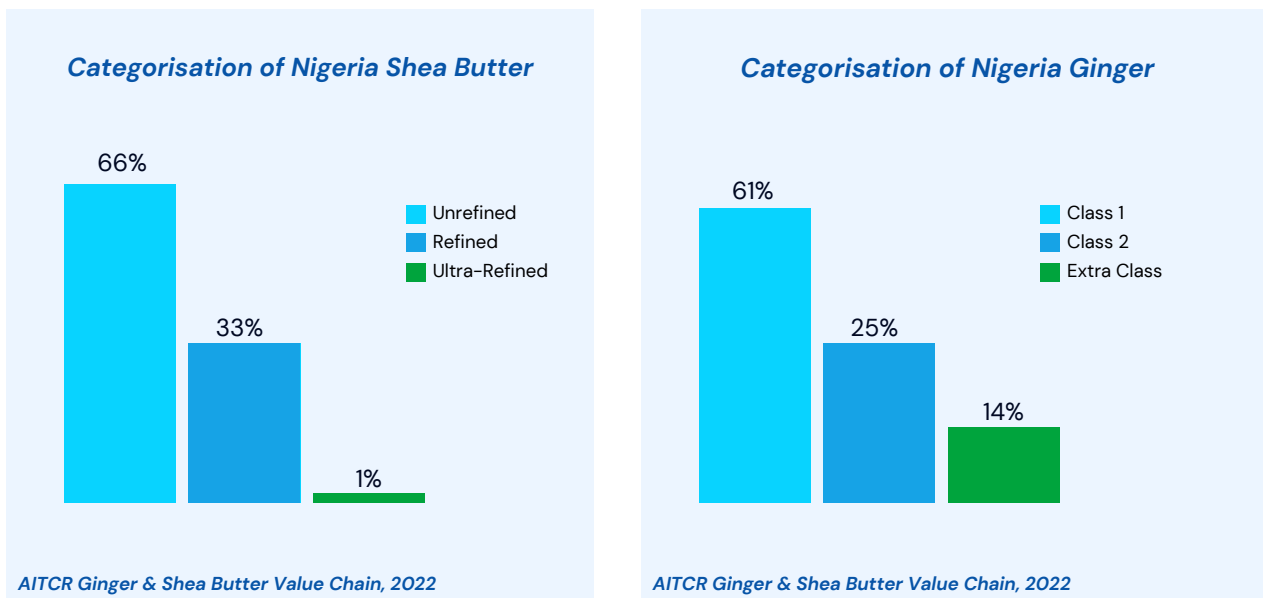


Figure 2: Distribution by Product Description

From figure 2, 66 percent of Shea butter respondents deal with unrefined shea butter across all respondent categories. 33 percent deals on refined shea butter, while only one percent deals in ultra-refined shea butter. This is noteworthy as unrefined Shea Butter is typically processed using the traditional handcrafted method, with researchers observing the process in most sampled states. Only a few processing centres have ultramodern processing plants installed. The research outcome revealed that in terms of potential benefits, yellow-coloured shea butter is the preferred unrefined category because it retains the essential vitamins, which must have been lost during the thorough refining process that the shea butter must have been subjected to. Respondents dealing in Class 1 ginger accounted for 61 percent of the entire ginger population, while 25 percent dealt in Class 2 ginger. Only 14 percent of the ginger respondents dealt in extra class. With the majority of ginger respondents dealing in Class 2 ginger, it thus reveals that the quantity of ginger produced in Nigeria is of high quality, which is a positive indicator for GI classification.

5.1.3 Role in relation to the Product

The shea butter and ginger value chain comprises the following key actors: farmers, marketers, exporters, and consumers that participated in the study.

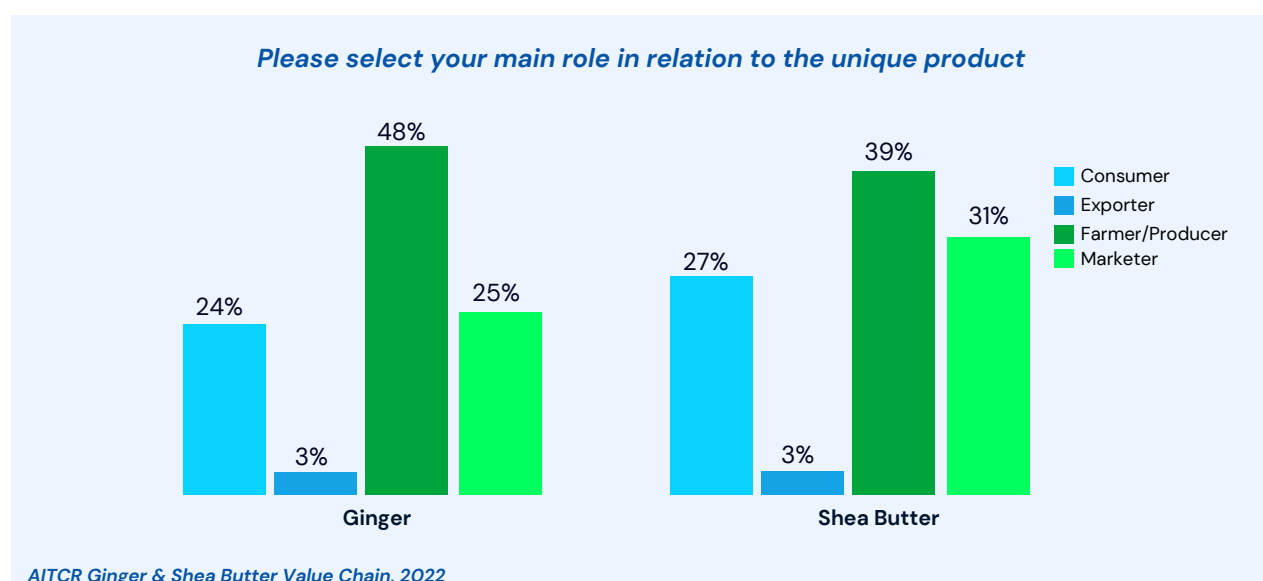


Figure 3: Distribution based on respondent role in relation to the product

The largest percentage of the respondents across both products are farmers and producers, accounting for 48 percent and 39 percent for ginger and shea butter, respectively. Marketers followed this, which represented 25 percent of ginger respondents and 31 percent of shea butter respondents. In the case of ginger, consumers accounted for 24 percent of the respondents, while Shea butter had 27 percent of the respondents. The exporters' category was quite low, accounting for just 3 percent of the respondents in both products. Evidence from the survey revealed that most exporters are involved in informal trade and are not residents of the state of production. The study found that most of the ginger and shea butter exporters are based in Lagos, Kano, and Abuja.

5.1.4 Respondent Gender Distribution

Advocacy for gender equality in almost all human endeavours has been a headline issue due to the perception of women's contribution to the development of any economy. Indeed, studies are beginning to explore the use of GI as a tool for women's economic empowerment through the recognition of women-led products such as shea butter.²¹

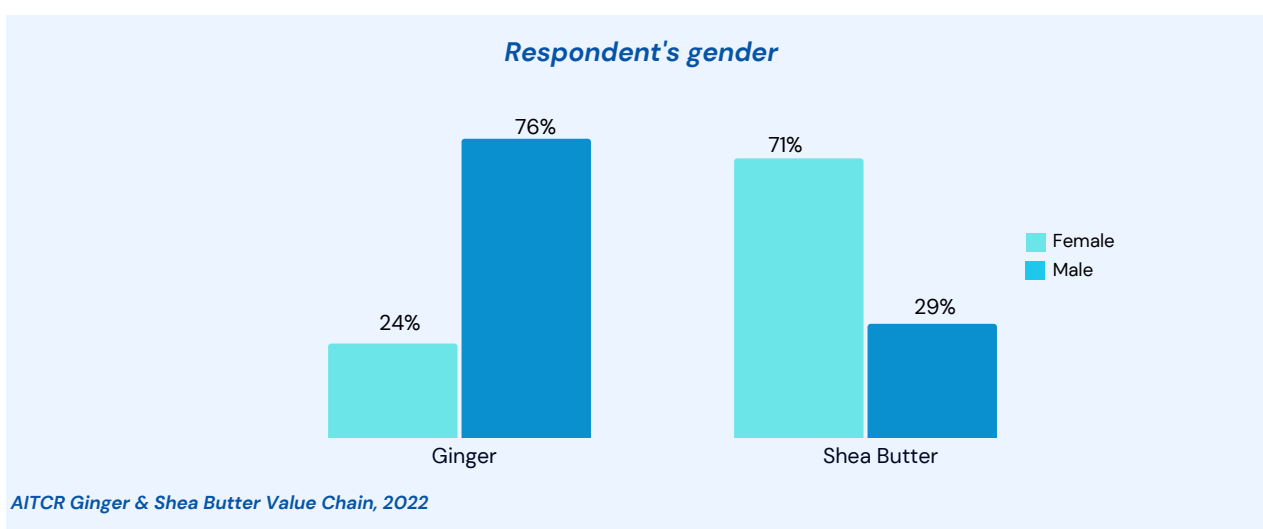


Figure 4: Graphical Distribution of Respondents by Gender

The graphical illustration in figure 4 reveals the dominance of women in the shea butter sector, accounting for 71 percent of the respondents in the shea butter category. Only 29 percent of those polled were male. The statistics indicate that the shea butter value chain is a typical women-dominated industry. The shea butter value chain is dominated by women, from picking shea nuts to processing them into commodities for a growing global market. This finding will be a veritable area that can be given all the necessary support to consolidate global efforts aimed at integrating women into the value chain.

However, the case of ginger appears to be the direct opposite of the situation in the shea butter industry, with males accounting for 76 percent of the total respondents, while females represented 24 percent of the total respondents. However, evidence from the data collected from the field reveals that women's involvement in ginger production is limited to primary processing, which involves cleaning, cutting, and drying, while further along the value chain, where more profits are made with less risk, women tend to acquire fewer benefits.²²

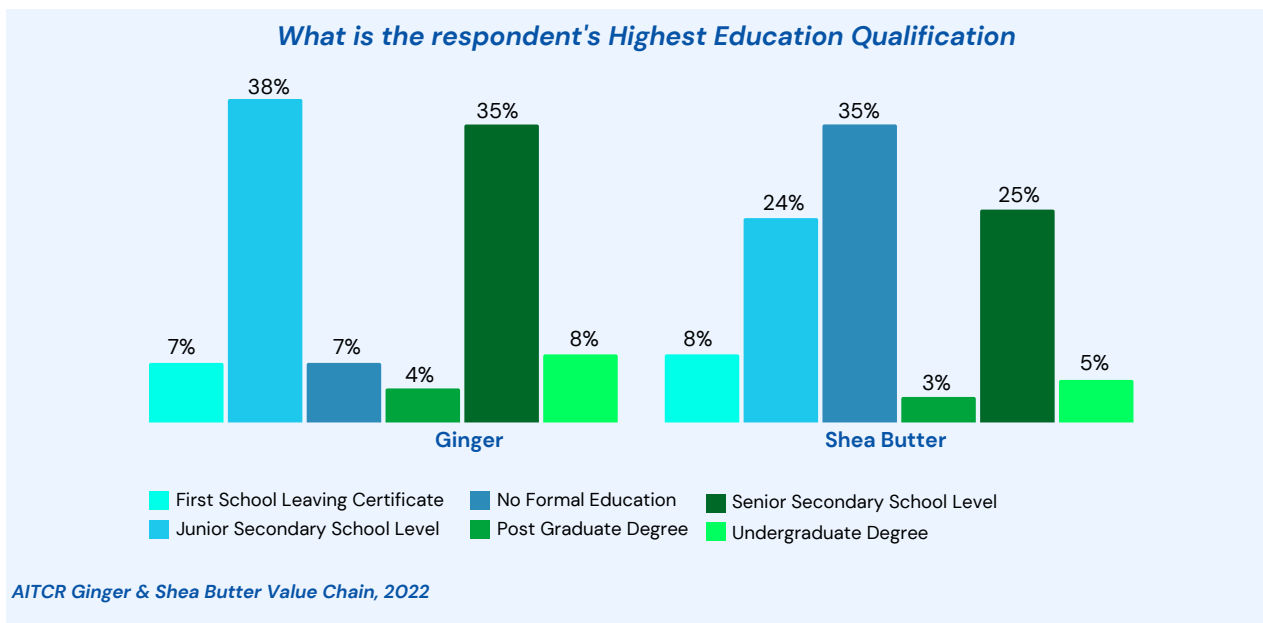


Figure 5: Graphical Distribution of Respondents Highest Education Qualification

Figure 5 depicts a graphical representation of the educational qualifications of respondents who produce ginger and shea butter. In the ginger and shea butter categories, those holding a First School Leaving Certificate were 7% and 8%, respectively. Ginger had 38% of the Junior Secondary School Level, while shea butter had 24%. Those with No Formal Education made up 7% of the ginger population but 35% of the shea butter population. The proportion of those who completed Senior Secondary School was 35% for Ginger and 25% for Shea Butter. Those with an Undergraduate Degree were 8% and 5% of the ginger and shea butter market, respectively. Finally, people with a Post Graduate Degree accounted for 4% of the ginger market and 3% of the shea butter market.

5.1.5 Percentage Distribution by Respondents' Employees

This statistical indicator measures the number of employees in each sector of the unique product. The employees' capacity defines the category the majority of the value chain actors fall into. Enterprises can be classified into different categories according to their size; for this purpose, different criteria may be used, but the most common is the number of people employed. Small and medium-sized enterprises (SMEs) employ fewer than 250 people. SMEs are further subdivided into micro-enterprises (fewer than 10 employees), small enterprises (10 to 49 employees), and medium-sized enterprises (50 to 249 employees). Large enterprises employ 250 or more people.

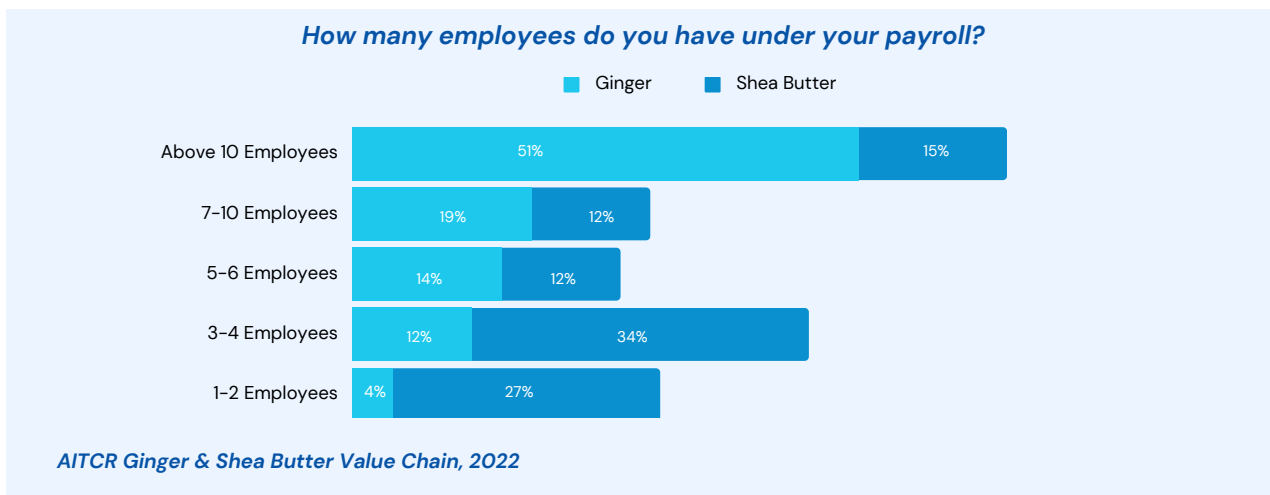


Figure 6: Percentage Distribution by respondents' employees

According to Figure 6, 27 percent of the respondents in the shea butter category have 1 to 2 employees. 34 percent have an employee size of 3 to 4, which appears to be dominant among other categories. Those between 5 and 6 accounted for 12 percent of the shea butter respondents. Another 12 percent have between 7 to 10 employees, while 15 percent have over 10 employees. It should be noted that only 45 percent of the respondents in the shea butter category have employees, indicating that most shea butter value chain actors operate as sole proprietors or, at most, on a micro-business scale. This graph is contained in the appendix.

In the ginger sector, 57 percent of the respondents engaged an employee's labour. Among them, 4 percent employ between 1 to 2 employees, 12 percent employ between 3 to 4 employees, 14 percent employ between 5 to 6 employees, and 19 percent have between 7 to 10 employees. 51 percent of survey respondents who employ workers have more than 10 employees. The ginger sector, by this standard, appears to have a better capacity than shea butter, which succinctly aligns with further evidence in the field, which clearly reveals that ginger production in Kaduna State, which is the epicenter of production, is done on a large scale and, as such, engages a large number of the labour force in the cleaning and packaging for exports.

5.1.6 Percentage Distribution by Respondents' Business Registration Status

From context observation, the informal sector in Nigeria is bigger than the formal sector in terms of employment and output year on year. Findings from the field, as graphically represented below attest to this fact.

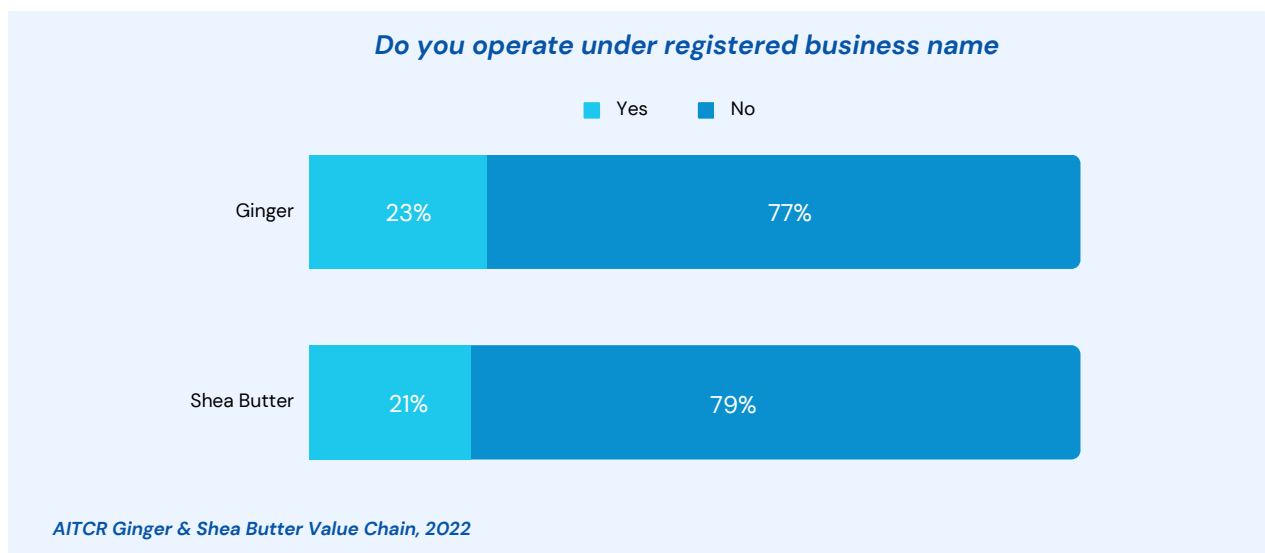


Figure 7: Percentage Distribution by respondents' business registration status

From Figure 7 above, 77 percent of the respondents in the ginger sector across the sample states do not operate under any registered business name, compared to 23 percent with a business name. This is a typical characteristic of informal businesses. Several respondents are without a registered business name, revealing the industry's height of informality. In the shea butter industry, the level appears to be higher, with 79 percent of the respondents across the sample states not registered. Only 21 percent of those polled have a business name. This statistic indicates that the preservation of the product's uniqueness and promotion for global recognition must consider the issue of informality.

5.2 Descriptive Analysis of the product Uniqueness

5.2.1 Productive uniqueness based on longevity of existence

The qualification of ginger and shea butter as unique products protectable under a GI framework lies in the age-long distinctive sign used to identify these products based on their quality, reputation or other characteristics related to their geographical origin. Hence, consideration is hereby given to the years of their existence.

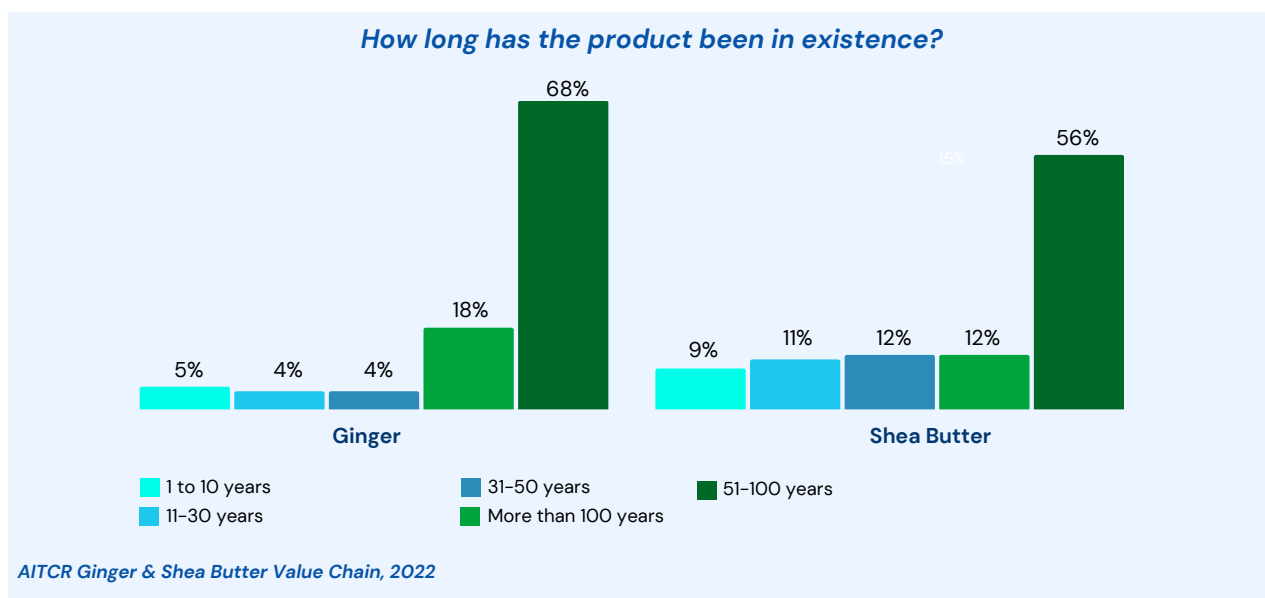


Figure 8: Distribution based on Productive uniqueness based on longevity of existence

Figure 8 reveals that most ginger and shea butter value chain respondents claimed that the products have existed for over a century, with 68 percent and 56 percent, respectively, attesting to this fact. Followed by these are those that claim the products have been in existence for between 51 and 100 years. For example, 18 percent of ginger respondents asserted that the product has been in existence for between 51 and 100 years, while 12 percent of shea butter respondents attested that the product has been in existence for the same number of years. Those who were of the opinion that ginger has only been in existence for 31 to 50 years represented 4 percent of ginger respondents, while those that were of the opinion that shea butter has been in existence for the same period represented 12 percent. 11 percent of shea butter respondents opined that the product has been in existence for 11 to 30 years, while only 9 percent claimed that the product has been in existence for only 1 to 10 years. The cultural linkage associated with ginger and shea butter closely follows the longevity qualification as unique products. While cultural heritage is a contested analytical category, its social and economic resonance is undeniable as a resource. Its contemporary prominence within the GI discourse has been associated with the potential for GIs to act as a fortification and promote the continuing significance of place-based communities.

5.2.2 Generic property of the product

The possibility of activating the origin-linked quality virtuous circle depends on the presence of certain pre-requisites, which are grounded in their specific characteristics, the result of a unique combination of natural resources (climatic conditions, soil characteristics, local plant varieties, breeds, etc.), local skills and historical and cultural practices, as well as traditional knowledge in producing and processing the products.²⁵ Beyond this, the concept of unique products, which has been developed over the years in line with actors along the value chain, is well-linked with sensory or organoleptic properties, which contribute to the uniqueness of a product.

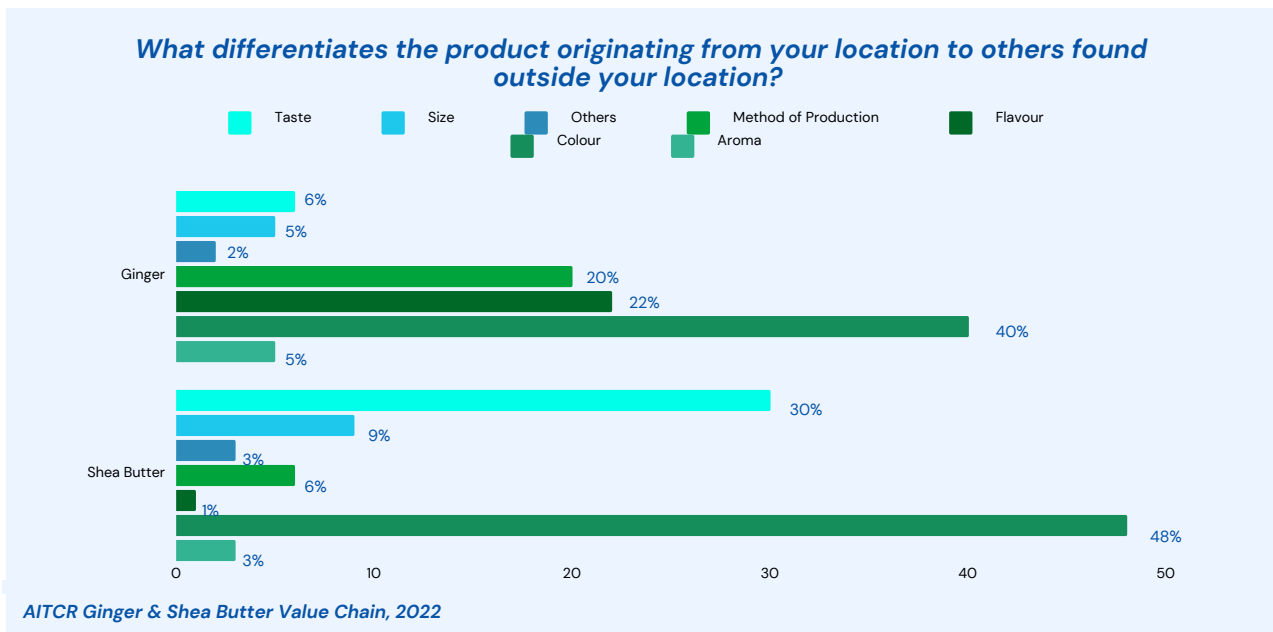


Figure 9: Distribution based on geographically linked differences

Figure 9 presents representations of a multiple-choice selection of ginger and shea butter's unique properties. Respondents who asserted that the colour of the product contributes to the development of the uniqueness of the identified product dominate the other features, accounting for 48 and 40 percent of ginger and shea butter respondents, respectively. For ginger, this is closely followed by 30 percent who claim that the taste contributes to the product's uniqueness and distinguishes it from ginger in other locations. Far below these percentages are the 9 percent of respondents who believe that the size of ginger distinguishes their product from others found outside their location. While 6 percent of ginger respondents opined that the method of producing ginger is the major distinguishing characteristic, only 3 percent were of the opinion that the aroma constitutes a significant difference. Other properties such as uniqueness of flavor and distinctive pepperiness, which has to do with pungency, were cited by 3% as making a significant difference. Further evidence from the field shows that the uniqueness of Kaduna ginger lies in its pungent nature.

On the other hand, 22 percent of shea butter respondents asserted that the flavour is what distinguishes the product from those from other locations. In comparison, 20 percent indicated that the method of production was basically the major characteristic that distinguishes it from those from other locations. 6 and 5 percent asserted that the taste and size of shea nuts, as well as the flavor of shea butter, distinguishes those from other locations. Experts say Nigerian ginger is highly regarded in the international market for its quality and high medicinal value. Specifically, its aroma, pungency, and high oil and Oleoresin content are other distinct features of ginger products from Nigeria.²⁶

5.3 Experience of the value chain players

Despite the potential of ginger and shea butter, the activities within the value chains and the actors' contributions have not been adequately captured and documented. However, previous studies on the ginger and shea butter value chains only focused on areas dealing with the challenges of post-harvest loss. Against this background, this study traced the linkages and profit shares among actors and identified the constraints in the shea butter and ginger value chains. This section contains the analysis of structured questions relating to the operations of the value chain actor with respect to the practice from planting to storage, marketing, and sales of the products

5.3.1 Product planting and gestational cycle

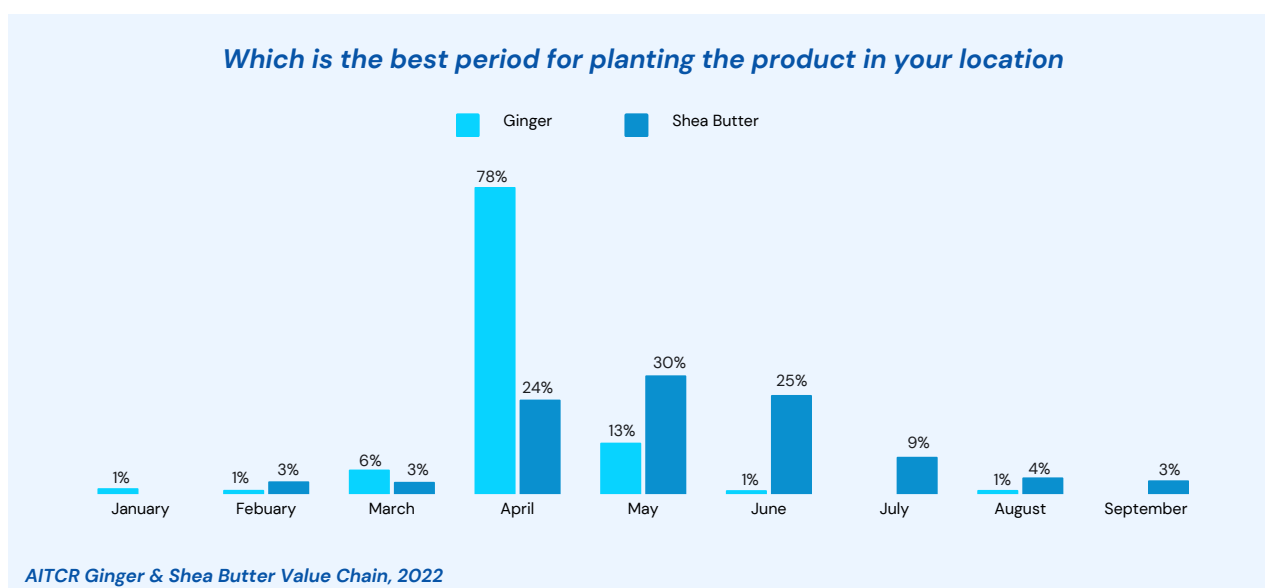


Figure 10: Distribution-based best period for planting the product

Figure 10 presents the bar chart distribution based on the best period for planting the product. The figure shows that the best planting period for Shea trees is April, with 78 percent of the Shea butter respondents accounting for this, while 13 percent indicated the month of May as the best planting period for Shea trees. According to the distribution, the best time to plant ginger is between April and July, with May being the most popular month, according to 30% of ginger respondents.. 24 percent of the ginger respondents asserted that April was the best planting period, while 25 percent of the respondents went for June. Only 9 percent of respondents said July was the best month for planting. Most of the respondents for the two products indicated that the chosen period, the rainy season, is best suited for planting the products.

5.3.2 Distribution based on the gestation period of the product

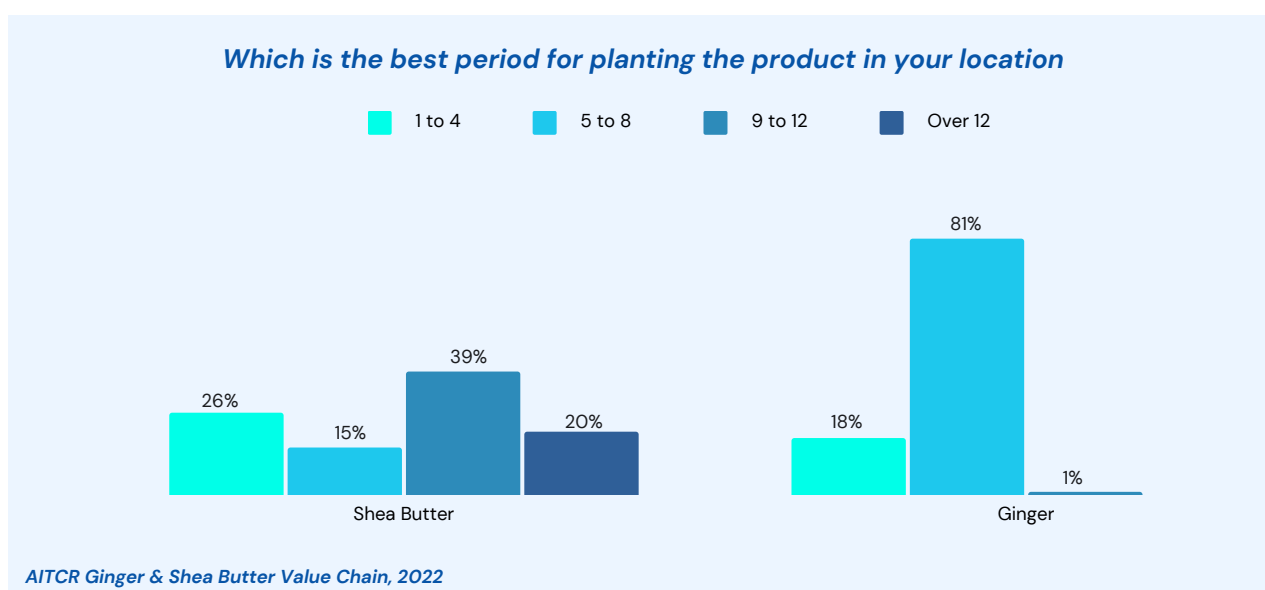


Figure 11: Distribution based on the gestation period of the product in weeks

From Figure 11, the majority of the ginger respondents representing 81 percent of the total ginger respondents, asserted that it takes 5 to 8 months for the product to mature, while the majority of the Shea butter respondents averred that it takes 9 to 12 months for the shea nuts to mature. 18 percent of the ginger respondents indicated that the product gestation period lasts between 1 to 4 months. On the other hand, 26 percent of shea butter respondents indicated that it matures between 1 to 4 months. At the same time, 20 and 15 percent of the respondents asserted that the product matured after 12 Months and 5 to 8 months, respectively. The median score for the ginger result consolidated findings from other research outcomes. As compared to other legumes and tuber crops, ginger has a higher and longer growth and gestation period of 8 months.²⁷ Some others revealed that ginger takes around 8 to 10 months to grow if the right steps are followed.²⁸

According to the Nigerian Institute for Oil Palm Research (NIFOR), the Shea Butter Research Center, Bida, is researching how they can domesticate the shea tree by reducing the gestation period. Shea trees can take up to 15 to 30 years before they start fruiting. However, NIFOR Shea Butter Research Center is currently conducting a series of studies to see if the gestation period can be reduced to seven or even five years.²⁹

Evidence from the field shows that the National Association of Shea Product of Nigeria (NASPAN) is setting up park lands in Niger State to increase the production of shea butter and other derivatives of shea nuts. Further evidence also shows that, there is a bill before the National Assembly for the establishment of a national shea development council.³⁰ Also, there is a bill aimed at establishing an institute for shea products in Nigeria.³¹ This move will increase and encourage research and development in the product value chain and further reduce the gestation period of shea trees.

5.3.3 Distribution based on harvest period of the Product

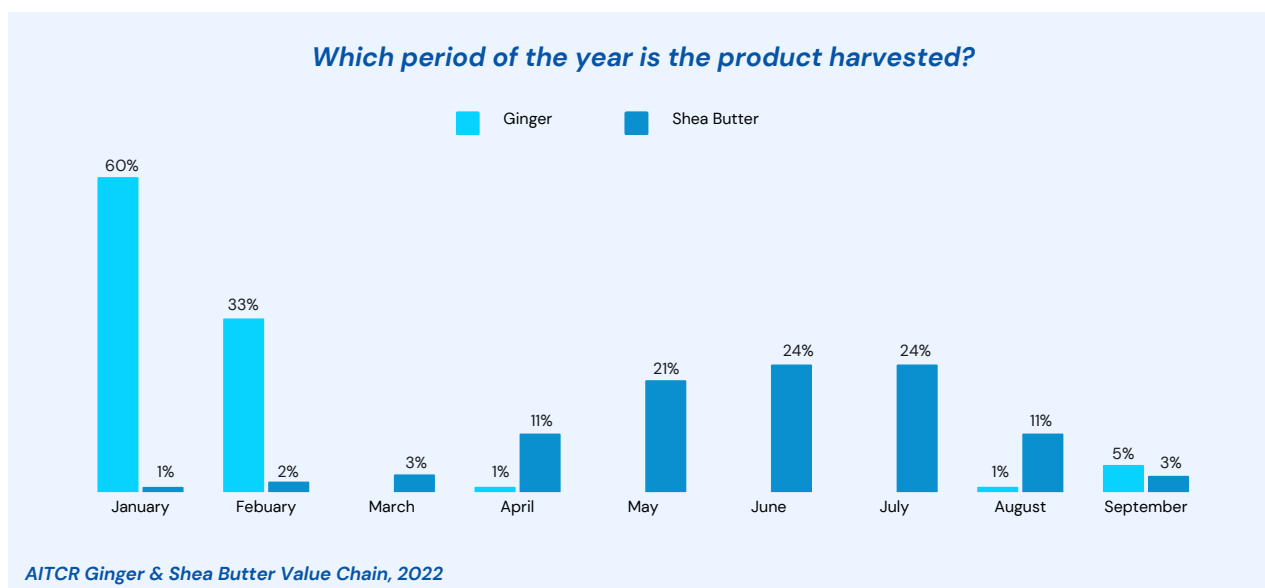


Figure 12: Distribution based on harvest period of the Product.

According to the distribution in figure 12, most ginger respondents, accounting for 60 percent, asserted that ginger is harvested in January, while 33 percent stated that the product is best harvested in February. A little variance emerged in other studies, revealing that ginger planting season starts in March and April during the rainy season. The harvesting season is from October to November, but can be kept for 2 years.³² The harvesting of shea butter is carried out through shea nut picking. From Figure 15, Shea nut picking (harvesting) typically starts from April to August, with a peak in June and July. These two peak periods outnumber all others, accounting for 24 percent in June and July, respectively. 21 percent of the respondents chose the month of May as the harvest period. These

findings corroborated other findings, which asserted that Shea fruits and nuts, which are “non-timber forest products” (NTFP), are gathered annually during the shea tree fruiting season that extends from May to September.³³

5.3.4 Product Average shelf life

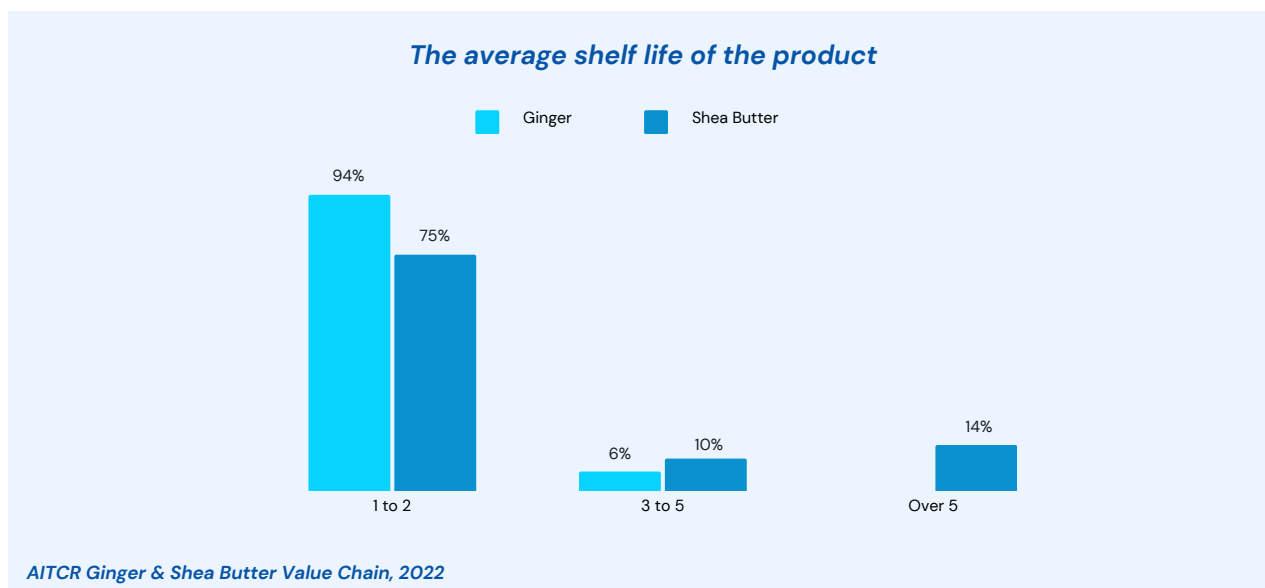


Figure 13: Distribution based on average shelf life of the product

The graphical illustration in figure 13 revealed the dominance of 1 to 2 years average shelf life of both ginger and shea butter, assented to by 75% of shea butter producers and 94 percent of ginger farmers. 14 percent of the shea butter producers asserted that shea butter has an average shelf life of over 5 years, while only 10 percent indicated that shea butter has an average shelf life of 3 to 5 years. Other findings also revealed that high-quality shea butter can be stored at a normal room temperature and has a long shelf-life of 12 – 18 months. The best way to store shea butter is in an airtight container, away from sunlight, heat, and water. Shea butter will have a lower quality shelf life, as low as 6 months, due to heavy metals, mold, and high moisture content contamination. A properly stored, ground ginger will generally stay at its best quality for about 3 to 4 years. It should be stored in containers with tight-fitting lids to maximize the shelf life of ground ginger purchased in bulk, and to retain flavour and potency.

5.3.5 Analysis of respondents' production capacity

According to FAOSTAT, Nigeria is the third-largest producer of ginger in the world, with a production average of more than 300,000 tonnes during the five years (2014–2018) period. Its global market share is about 11 per cent, trailing only India (35%) and China (18%). Similarly, Nigeria, the leading producer of Shea butter in the world with a production capacity of about 500,000 metric tons per year produced mainly from the use of crude implements, is yet to fully realize her potential in the processing and export of Shea butter owing to several reasons. The analysis of ginger and shea butter production capacity positively impacts the potential for the domestic and export market and possible areas of support.

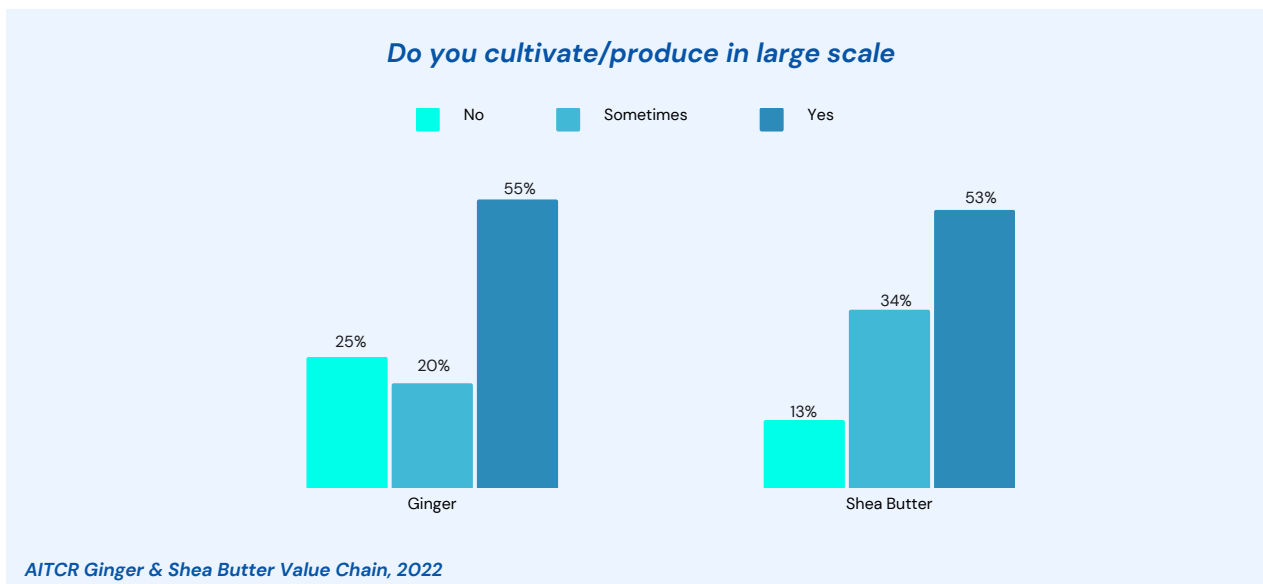


Figure 14: Distribution by respondents' scale of production

The graph above on respondents' scale of production reveals that the largest percentages, 55 percent and 53 percent, of ginger and shea butter, respectively, are produced on a large scale, dominating every other category. 20 percent of ginger producers confirmed that they only produce on a large scale on occasion, while 25 percent do not produce on a large scale at all. On the other hand, 34 percent of shea butter producers only produce sometimes on a large scale, while 13 percent do not produce on a large scale at all. This statistic placed critical importance on the analysis of annual production capacity in the subsequent analysis, as it provides an accurate picture of Nigeria's production capacity in ginger and shea butter. This statistic indicates that stakeholders need to shore up support for ginger and shea butter production in the country, especially with expert findings revealing that the average yield per hectare in Nigeria is about 13–27 metric tonnes compared to the global average of about 35–40 metric tonnes.³⁶ Our findings also revealed that large-scale farmers had devised a means of storage for their products. One instance cited by one of the respondents: **"clean the ginger, slice it, dry it for about 10 -14 days, then bag it, store in a well dry and cool place"**. This explains the method of preservation used by the majority of ginger producers. Many of the shea butter producers explained that the shea butter kernel should be kept away from moisture, keeping the butter away from heat.

5.4 Analysis of product Demand in local and International Market

This section of the report contains a descriptive analysis which provides a clear view of the component of product demand from farmers' and marketers' perspectives. Currently, Nigeria's ginger production is at 31 million metric tonnes (MT), while demand is at 65 million MT, leaving a supply-demand gap of 34 million MT, according to data from the Federal Ministry of Agriculture and Rural Development. Also, Nigeria ranked first in terms of the percentage of total hectares used for ginger cultivation, but her contribution to the entire world output is low compared to other countries.³⁷ Nigeria currently earns over \$5 million yearly from shea butter exports. The country, however, is targeting about \$100 million in annual earnings from the commodity. This section will provide a broad overview of the potential that lies in these unique products.

5.4.1 Distribution based on number of regular customers/buyers

The chart below analyses the number of buyers and consumers of ginger and shea butter

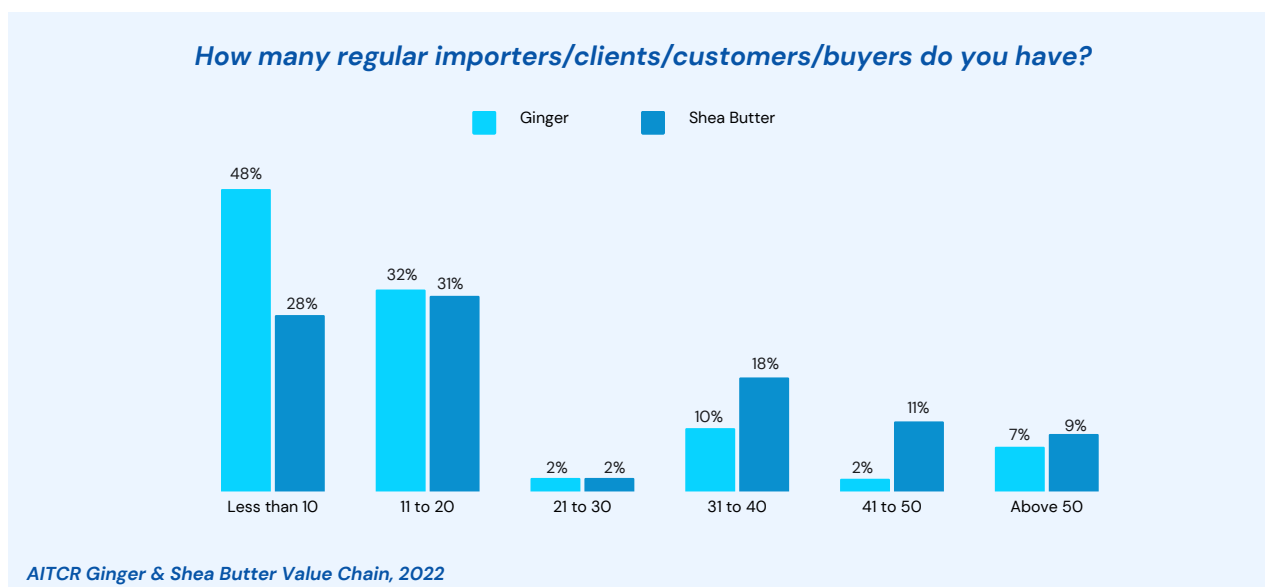


Figure 15: Distribution based on number of regular customers/buyers

Figure 15 above, the greatest proportion of ginger respondents have less than 10 buyers. This category accounted for 48 percent of the farmers and marketers of ginger captured by the survey. 32 percent have between 11 and 20 buyers. 10 percent have between 31 and 40 buyers, while only 7 percent of the ginger respondents have over 50 buyers. In the case of shea butter, the greatest proportion of respondents have 11 to 20 buyers representing 31 percent of the entire shea butter producers and marketers. 28 percent have less than 10 buyers. 18 percent have 31 to 40 buyers, while only 9 percent of the shea butter respondents have over 50 buyers.

5.4.2 Distribution based on highest one-time quantity sold

The distribution provides a more profound insight into the capacity of the producers and marketers of ginger and shea butter.

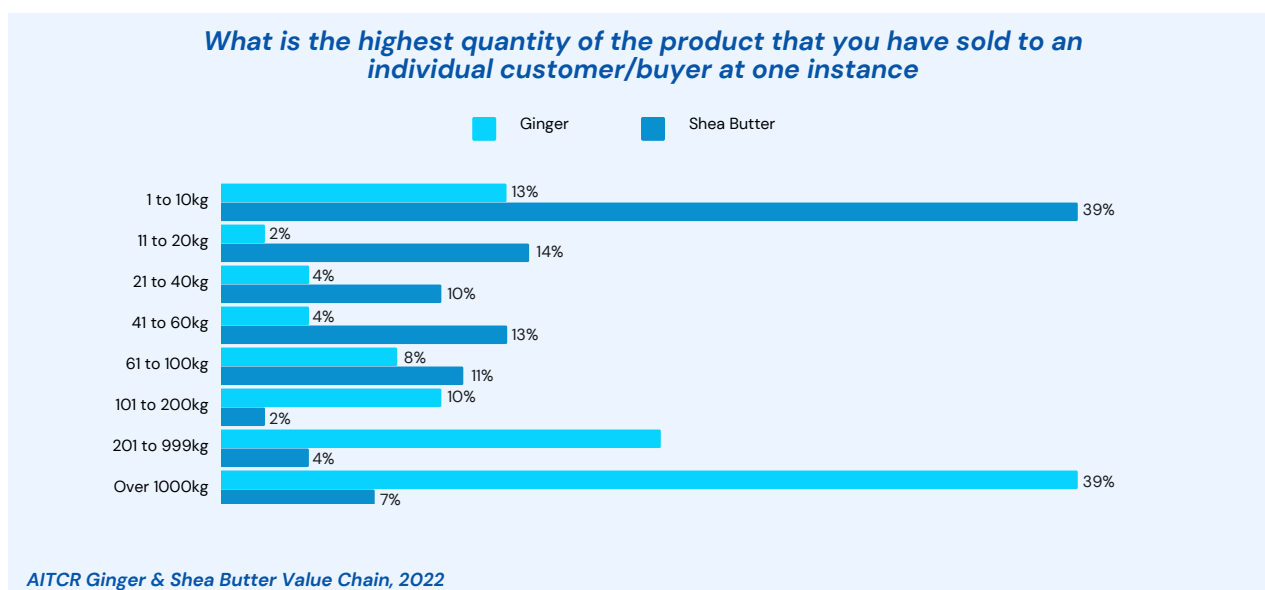


Figure 16: Distribution based on highest one-time quantity sold

According to Figure 17, the highest percentage representing 39 percent of the shea butter respondents, sold 1 to 10kg as the highest quantity ever sold to a single individual in a purchase. This was followed by 14 percent of the respondent who claimed that the highest they have ever sold to a single buyer in a single sales deal was between 11 to 20kg while those that sold between 41kg to 60kg in a single sale to a buyer accounted for 13 percent of the shea butter respondents. Only 7 percent of the shea butter respondents have ever sold more than a ton or 1000kg to a single buyer in a single sale transaction. Similarly, on ginger, the greatest percentage, representing 39 percent of the ginger respondents, sold over 1000kg as the highest quantity ever sold to a single individual in a purchase. This was followed by 20 percent of the respondents who asserted that the highest they have ever sold to a single buyer in a single sales deal was between 201 and 999 kg while those that sold between 1kg and 10kg in a single sale to a buyer accounted for 13 percent of the ginger respondents. Only 2 percent of the ginger respondents sold between 11 and 20kg to a single buyer in a single sale transaction.

5.4.3 Distribution of comparative demand of unique product compared to close substitute

By their very nature and uniqueness, unique products have higher comparative demand than similar products. The benefit of the unique products lies in their ability to significantly attract high demand, which leads to the ability to offer such products at a premium. The graphical illustration below compares the demand for ginger and shea butter with close substitutes utilised for similar purposes. The analysis gives much insight into the market advantage of the producers of close substitutes. It also shows the extent of the product price elasticity.

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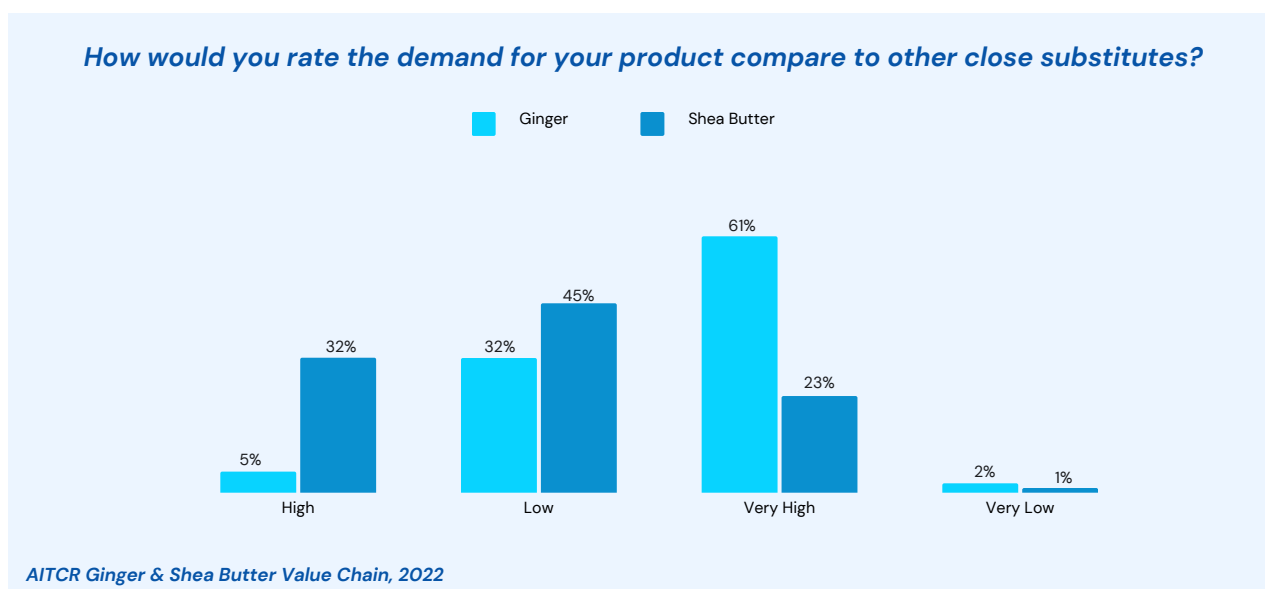


Figure 17: Graphical Distribution of comparative demand of unique product compared to close substitute.

From figure 17, a very positive outcome can be seen in the case of ginger, where it commands a very high demand compared with a close substitute, as accounted for by 61 percent of the producers, marketers, and exporters of the product. This corroborates assertions from some of the respondents

that *“Kaduna ginger is one of the best in the world due to its unique pungent characteristics. It is in high demand, especially in middle east countries and Europe”*. This strongly indicates low-price elasticity and possibly premium pricing since the majority of the buyers prefer it over other close substitutes. Other respondents claimed that when combined with other spices such as turmeric and clove, it becomes indispensable in a recipe. Furthermore, because of the shortage of nuts for production, demand appears to outweigh supply. According to 32 percent of respondents, demand for ginger is moderate when compared to close substitutes. 5 percent asserted that the demand is low compared with close substitutes. Only two percent claimed that the demand for ginger is very low compared with close substitutes. On the other hand, 45 percent of shea butter respondents affirmed that the demand for shea butter is moderate compared with close substitutes. As attested to by some respondents, the demand level is driven by the medicinal usage of shea butter. The statement below from a shea butter producer reveals one of the reasons for its high demand.

“I used shea-butter to make local soap that is mostly used and common among our people. My own soap, which I made with shea butter, lasted longer than other marketers' and sellers' products. [...] this makes the patronage for my product to be very high”. 32 percent of shea butter producers and marketers asserted that shea butter demand is low compared with other close substitutes, while 23 percent asserted a high demand over close substitutes.

5.4.4 Analysis of period with the highest demand

The period of highest demand gives further insight into comparative demand with close substitutes

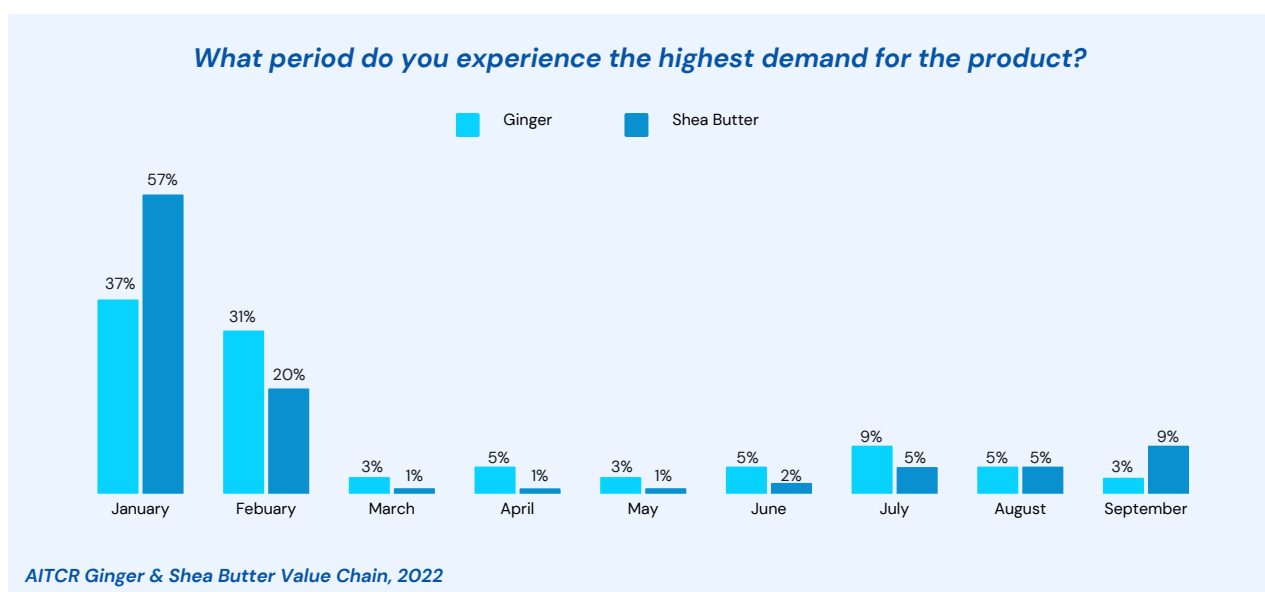


Figure 18: Graphical Analysis of the period with the highest demand.

Generally, from figure 18 above, January and February appear to be the months with the highest demand for both ginger and shea butter, accounting for more than 50 percent of respondents' agreement. 57 and 20 percent of shea butter respondents asserted that they had their highest demand in January and February, respectively, while 37 and 31 percent of ginger farmers claimed to have their highest demand in January and February, respectively. In these two months, demand for ginger and shea butter surpasses other months significantly. Further research outcomes revealed that the global ginger market witnessed a Compound Annual Growth Rate of around 4.8% during 2017 – 2021. The market is currently being driven by population growth, changing demographics, increasing health consciousness, and busy lifestyles across the globe.³⁸

5.4.5 Analysis of Annual Sales volume of Ginger and Shea butter

According to the Food and Agricultural Organisation (FAO), Nigeria was the world's largest producer of shea butter, producing 361,017 MT. As of 2018, the average price of a metric ton of shea butter produced at the cluster was sold for as low as N350,000 owing to quality issues. But premium grades, sought by traders, sold for an average of N750,000 the same year.³⁹As of 2020, the amount of ginger produced in Nigeria reached over 734,000 metric tons. The preceding year produced around 647,000 metric tons of the flowering plant. Considering the period under study, the peak of ginger production in Nigeria was achieved in 2017, with 834,600 metric tons. The graphical analysis of the sales of ginger and shea butter volume further explains the current sales volume under the period of study.

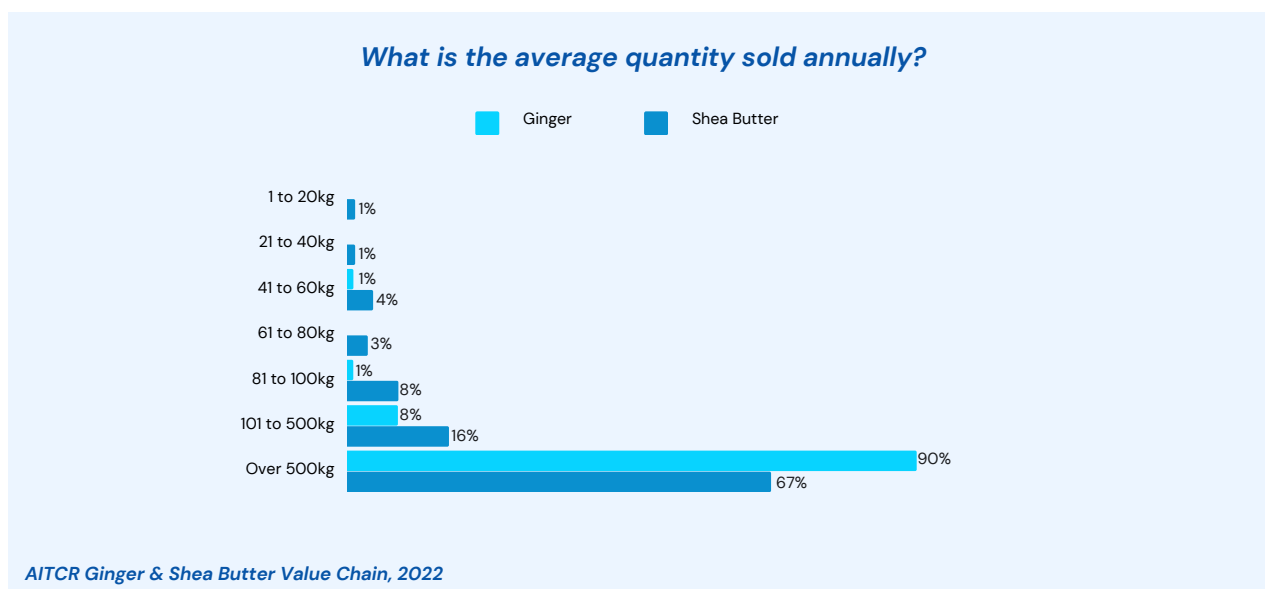


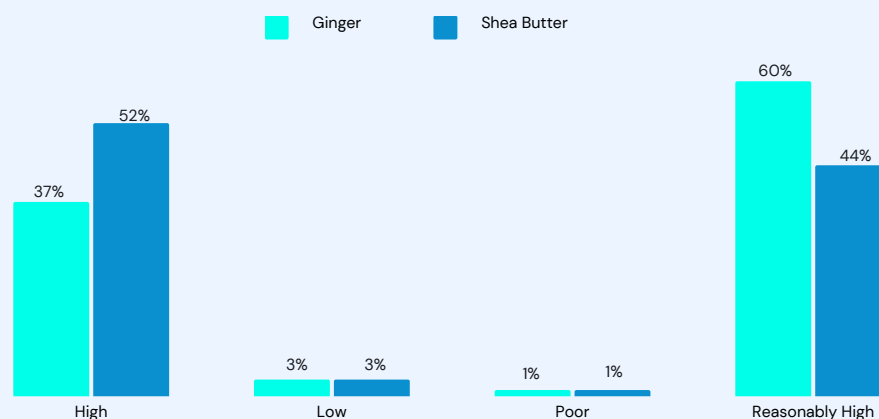
Figure 19: Graphical Analysis of Annual Sales volume of Ginger and Shea butter

From the illustration in figure 19 above, the annual sales volume corresponds with what is obtainable in the period's findings on annual sales volume. 90 percent of ginger producers, marketers, and exporters reported annual sales exceeding 500kg, while 67 percent of shea butter respondents (all categories except consumers) reported annual sales exceeding 500kg. This percentage of the respondents dominates other categories that sell below 500kg annually for ginger and shea butter.

5.4.6 Analysis of the rate of the demand for your product locally

The rising demand for traditional convenience food products is boosting the use of ginger in the food and beverage industry, which is augmenting the industry's growth. Ginger is also used in the baking industry in the production of tremendously popular products such as gingerbread and ginger cookies, consequently fueling the growth of the ginger industry. Demand for these have been estimated to have risen significantly locally. There is a substantial local⁴⁰ demand for shea nuts and butter, despite more involving processing in the shea butter supply chain. There is more current or expected demand in urban areas or for export than in rural areas; thus, enhancements in urban processing are warranted. The graphical illustration below further analyses ginger and shea butter demand.

The local demand for Nigeria Ginger and Shea butter



AITCR Ginger & Shea Butter Value Chain, 2022

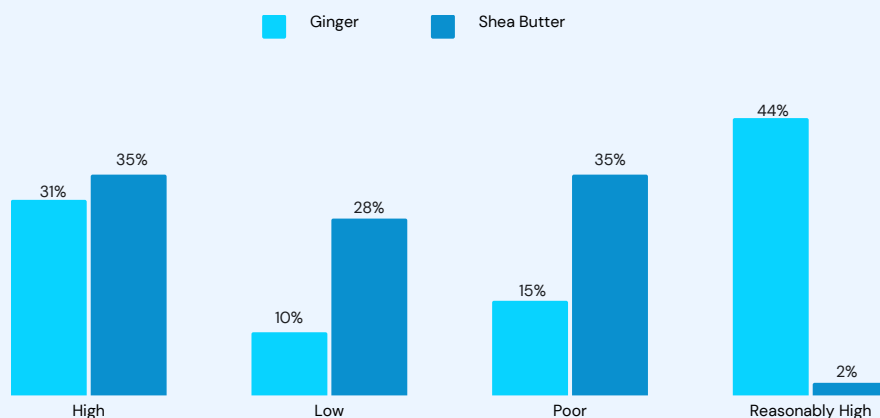
Figure 20: Graphical Analysis of rate of the demand for your product locally

From figure 20 most of the respondents for both products ranked the local demand as either high or reasonably high. 60 percent of ginger respondents rated the demand locally as reasonably high, while 37 percent rated the demand for ginger as high locally. Only 3 percent and 1 percent of the respondents rated the demand for ginger locally as low and poor, respectively. On the other hand, 52 percent of shea butter respondents rated the demand for shea butter in the locality as high, while 44 percent rated the demand as reasonably high. The percentage of shea butter respondents who rated demand as low or poor were 3 and 1 percent, respectively. This outcome corroborated other market findings that reveal that Shea butter is currently in high demand both locally and internationally.

5.4.7 Analysis of the demand for Ginger and Shea butter internationally

According to the Nigerian Export Promotion Council (NEPC), global demand for shea butter is estimated at \$10 billion and is projected to surpass \$ 30 billion by 2020.⁴¹ According to data from the Nigerian Federal Ministry of Agriculture and Rural Development, the country exports most of its ginger, making Nigeria the third highest exporter of the crop globally, confirming the level of demand for Nigeria's ginger in the international market.⁴² The graph below presents a detailed analysis of the international market demand for Nigerian ginger and shea butter from the respondent's perspectives.

The demand for Nigeria Ginger and Shea butter internationally



AITCR Ginger & Shea Butter Value Chain, 2022

Figure 21: Graphical representation of rate the demand of Ginger and Shea butter internationally

According to Figure 21, international demand for ginger is rated significantly high, as 44 percent of the ginger respondents rated the demand as reasonably high. This percentage is closely followed by the 31 percent that asserted that the international demand for ginger was high. 10 percent claimed that demand from the international market was low, while 15 percent considered the demand poor. While on the other hand, only 2 percent of shea butter respondents ranked the demand for Nigeria’s shea butter as reasonably high, 35 percent rated the demand as high. The increase in domestic consumption and export of Shea nuts worldwide is occasioned by the ever-growing demand for Shea butter for chocolate, confectioneries, pharmaceuticals, and personal care industries in Europe and the United States. Nigeria is regarded as the largest producer of Shea nuts in Africa, with a production capacity of about 370,000 metric tons, which is about 53 percent of the total world output; the country only ranks fourth in terms of export among the African Shea butter exporting countries, because most of Nigeria’s shea butter is exported informally to neighbouring countries, from where it is repackaged and officially exported to other international markets. In addition, obtaining contrary results of 35 percent and 28 percent indicated that international demand is either poor or low due to low market access, low level of refinement, or poorly rated international standards because of the crude method of production.

5.4.8 Analysis of Nigeria Ginger and Shea butter uses

The major demand driver of Nigeria Ginger and Shea butter in the domestic and international market can be linked to a plethora of uses of the product across a number of industries, ranging from pharmaceuticals, cosmetics, and confectionary industries.

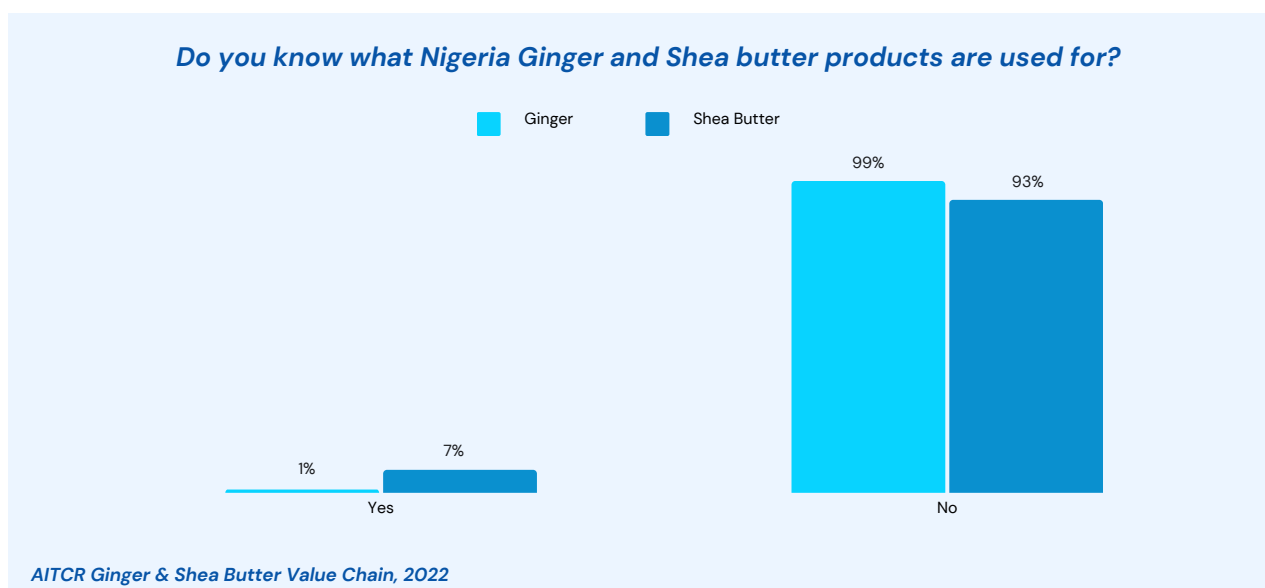


Figure 22: Graphical representation of respondents’ assertion of product use

From the figure above, nearly 100 percent of the respondents in both product categories asserted that they understand what their products are used for. Based on the responses from shea butter producers, the uses cut across the following:

- Hair treatment products
- Anti-ageing and anti-wrinkle creams
- Body and face moisturizing creams
- Sun protection products
- Hair treatments for a dry scalp
- Used by the food industry

Nigeria's shea butter is used to moisturize and has anti-inflammatory properties. While ginger respondents asserted and identified that most gingers are used for species as medicinal plants, food flavourings, and dietary supplements. Products from ginger, including oil and fresh and dried rhizomes, can be used to treat malaria, asthma, and headaches and act as anti-inflammatory and anti-microbial agents. Further evidence from the field shows that ginger extracts include ginger drink and ginger powder used for spicing and acts as anti-inflammatory and anti-microbial agents. According to one of the respondents, *"Nigeria has one of the best gingers in the world, and its medicinal value cannot be overemphasized; that is why the product is sought after internationally"*.

5.4.9 Analysis of major buyers of Nigeria Ginger and Shea butter by rank

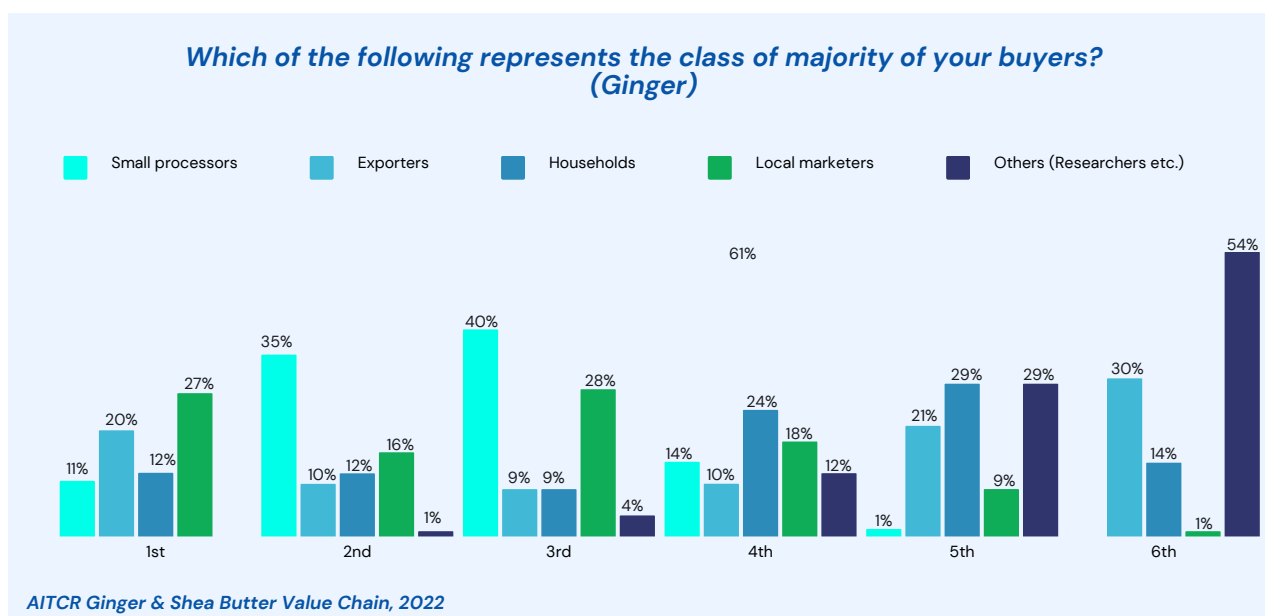


Figure 23: Graphical represent major buyers of Ginger and Shea-butter by rank

The ranking of major buyers of Nigerian ginger above revealed that among the highest buyers ranked first are marketers/exporters, dominating the group by accounting for 47 percent. Exporters were ranked 6th by 30 percent of the respondents, 5th by 21 percent, and 2nd by only 10 percent. Small processors who specialise in transforming ginger into other valuable products were ranked 3rd by 39 percent of the respondents, followed by 35 percent that ranked them 2nd. Only 11 percent rated them first as their major buyers. From the ranking, small-scale processors were predominantly considered major ginger buyers. Household buyers were predominantly ranked 5th place by 29 percent of the respondents, while 24 percent ranked them 4th on the scale; thus, household buyers are not among the major buyers from farmers. Following small-scale processors, local marketers were highly ranked as the majority of the respondents ranked them between 1st, 2nd and 3rd place among major buyers. This corroborates field experience in an indigenous ginger industry in Kaduna that is in the production and packaging of ginger instant drinks, ginger drinks, powdered ginger and dried split ginger. According to company staff, "we get our supplies from the local market", without any defined standard". Others comprise buyers without a defined portfolio of their origin and final use of the products

5.5 Descriptive Analysis of Nigeria Ginger and Shea butter value chains

5.5.1 Process involved in the production of the product

The uniqueness of the production method remains one of the key attributes of unique products. Nigeria Ginger and Shea butter are found across diverse geographical locations; one distinguishing factor remains the traditional method of production: the soil and the presentation of each product. For example, the study found that in Tede, headquarter of Atisbo local government area in Oke-Ogun region of Oyo state, South-West Nigeria, where shea butter producers claimed to be known over the years as the original producers of shea butter in Oyo state, have a unique means of production. This was indicated by the majority of industry players who asserted that the community had retained the traditional method of production over the years, and they also claimed that the unique method of processing shea butter from the region is their trade secret which cannot be disclosed or revealed to people that are not from the locality because it was handed down to them from past generations. As shown by the research already referred to above, for a product to qualify as a geographical indication product, the uniqueness of production must have existed for many years. This section illustrates the characteristics of shea butter and ginger based on the production process and value chain.

5.5.1a Ginger Production Process

A general compilation of responses for ginger producers reveals the unique stage in ginger farming and production. The study reveals that after harvesting, farmers process the ginger by rinsing or cleaning, splitting, and drying the crop before taking it to the market as dried split ginger (which generates higher prices than fresh ginger). The processing techniques largely differ from location to location covered by the survey, revealing that most things are still done manually and rudimentarily. Women mostly do manual sorting, grading, cleaning, splitting, sun drying, and peeling. Most Nigerian ginger is still sun-dried in open fields/space, along the roadsides with just a plastic bag spread on the floor that separates the ginger from the soil or on the rooftop of a building in most farming areas, which easily leads to microbial contamination or to the accumulation of impurities like sand, debris, and stones; this diminishes its quality. The ginger is left out to dry for four to five days before being packed into sacks for sale in local markets or storage. This practice is common among ginger farmers, so market agents have to sort and grade the ginger after buying it, remove impurities, and, most times, dry the ginger before sending it to the commodity agents. In some cases, the agents still dry the ginger for a number of days if they find that the crop still has a high moisture content. For dried split ginger, the moisture content should be 10 - 12% (for it to be used in further processing), while the uniform thickness of the split ginger makes drying quicker and more effective). It was also observed that about 90 per cent of Nigerian ginger is exported as dry splits. When Nigeria secures the necessary legal and regulatory framework on GIs and Nigeria ginger passes through the assessment, it will be able to classify and label Nigeria ginger as GI. It will allow producers to process it into ginger powder, ginger tea, ginger oil, and oleoresin. In the dried ginger segment, Nigeria is the world's third-largest exporter (after China and India).

5.5.1b Shea-butter Processing chain

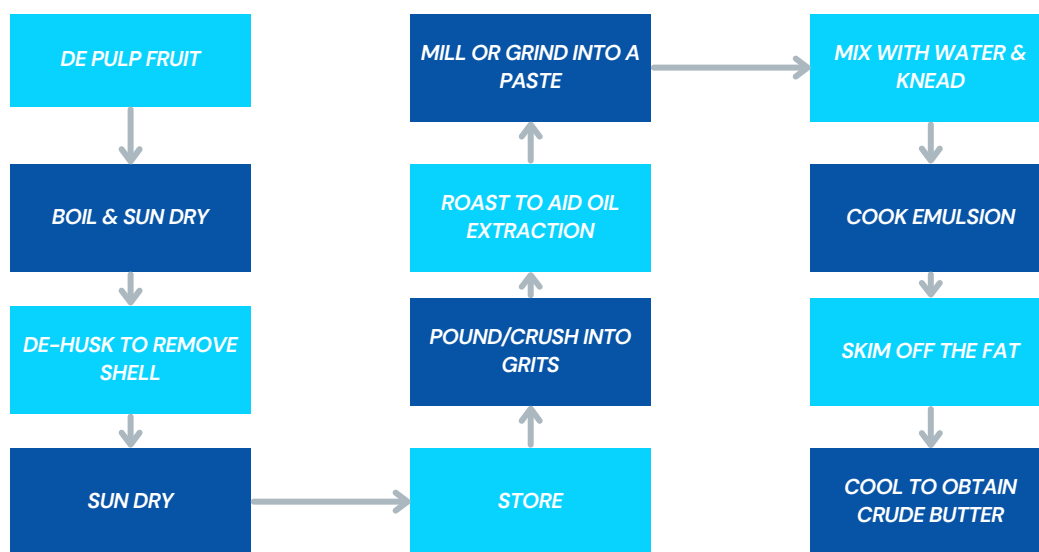


Figure 24: Shea Butter stages of production

The process of extracting oil or butter from the shea seed may involve a totally manual system or be partly mechanized through the use of diesel or electrically-powered attrition mills, crushers, and kneaders. The continued production of butter from dried shea nuts using traditional manual techniques proves tedious, labour-intensive and inefficient. However, this method is prevalent among producers. This demands large quantities of water and wood fuel and creates a significant drain on scarce resources in the semi-arid areas where shea grows. The processing input of 18.5kg of raw shea nuts requires 48kg of wood and 67litres of water. A semi-industrialised processing plant has been developed alongside traditional methods in the shea-producing areas of Tede (Atisbo LGA) and Saki, in the Oke-Ogun region of Oyo State, South-West Nigeria, where 80% of the shea butter is made through the traditional method. This traditional process used by these rural women has been handed down from generation to generation. In the traditional form, women pound the kernel with a pestle and mortar to break the seed into grits, roast the kernel to facilitate easy extraction of the shea butter and grind the grits into a paste. The women continue the process by kneading the paste in water to capture the shea fat into an emulsion, boiling the mixture to separate the butter and skimming off the fat. The final cooling process leads to shea butter. The flow chart above in figure 24 illustrates the processes

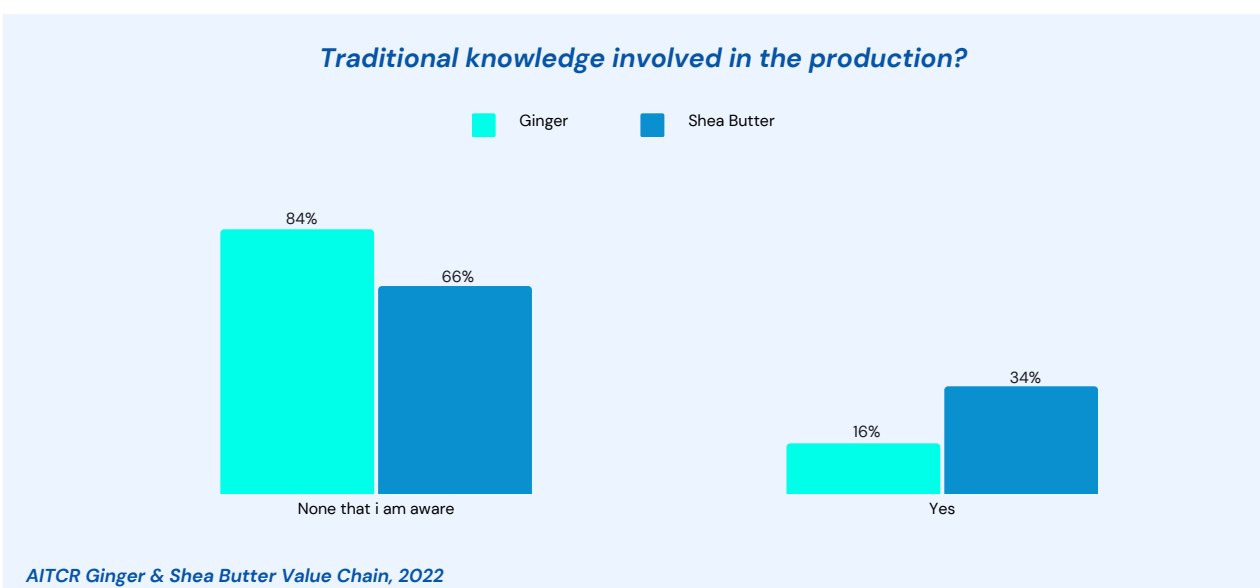


Figure 25: Representation traditional knowledge involved in the production

According to Figure 25, the involvement of the pure traditional method does not appear to be very pronounced in the ginger and shea butter production, with only 34 percent of shea butter producers claiming to be aware of the traditional method of production, and 16 percent of ginger producers claiming to be aware of the traditional method of ginger production. The remaining respondents claimed their non-awareness of the traditional method of production.

Ginger Value Chain

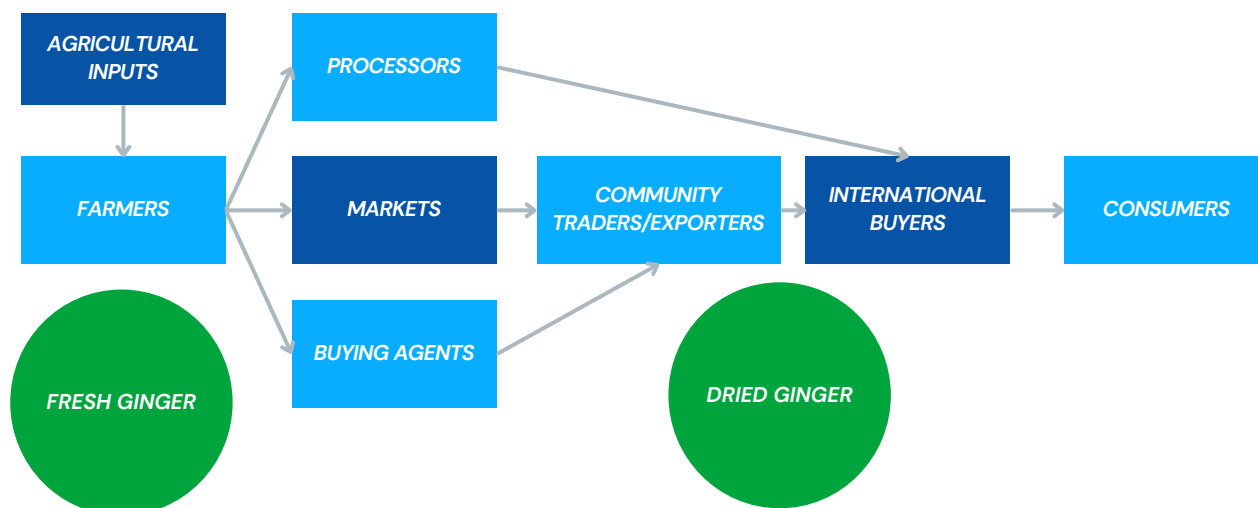


Figure 26: Source: AITCR 2022 Adapted from Ginger value-chain based on field study

Above is a simplified schematic illustration of the Nigerian dried ginger value chain trade flow from a field account. Ginger demand (both fresh and dried) is typically year-round. This is large because of its multiple uses and areas of application. The demand for and trade in Nigerian ginger is steady and has the potential to grow should the quality and yield increase (amongst other market factors). Dried split ginger is produced and traded mainly as a commodity for export markets (90 - 95% of Nigerian gingers are sold as dried splits). Approximately 82 percent of Nigerian ginger is purchased by commodity traders (meant for export); the remainder is primarily purchased and traded by processors and others (including cottage industry and contract sales) for domestic use. There are commodity buyers from various locations, mostly representing corporate buyers and end-users across Nigeria. Smallholder ginger farmers are often uneducated, lack information, and are confident dealing with processing factories and exporters, making them dependent on intermediaries like buying agents. Field accounts indicate buyers come from neighbouring countries like Niger and Chad for Nigerian ginger. Most of the buying agents from the market farmers represent commodity trading companies based in Lagos and Kano. Ginger is transported in trucks of different sizes to various destinations and is a major source of income for the community. Based on information from exporters, including Olam, Nigeria needs to standardize the process of ginger production and increase the volume that will meet international market expectations.

Shea Butter value chain

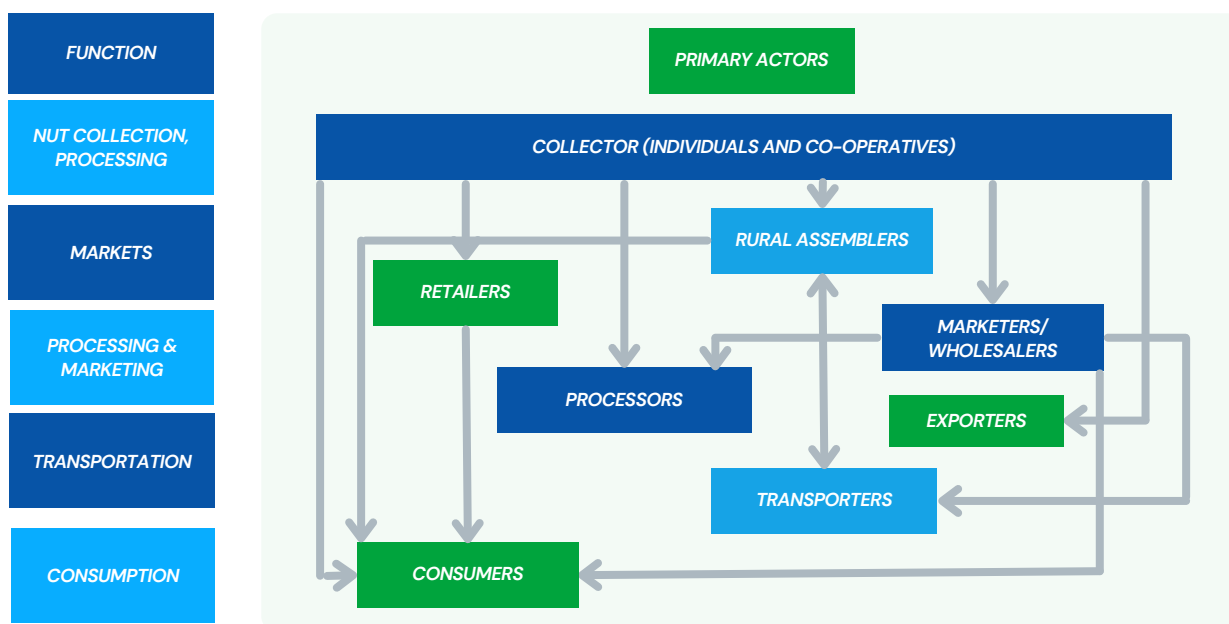


Figure 27: Source: AITCR 2022 Adapted from Shea butter value chain based on field study

The shea butter value chain comprises several actors performing different activities and functions supporting the entire chain. The actors perform certain activities that ensure the shea nuts are obtained and processed using different marketing mixes to reach the final consumers. The supporting actors ensure that the environment and conditions for performing these activities are convenient enough to maximise the efficient use of resources.

Primary Actors

(a) Collectors: Shea nuts are collected during the picking season, which typically runs from April to August. Shea nut picking is done mostly by women and youths. Respondents reveal that shea fruits are generally allowed to fall on the ground before picking, indicating that the fruits are ripe enough to yield the quality shea butter required. The collected nuts are then gathered, and the fleshy pulp exterior is removed (de-pulping) by hand to facilitate the process. The pulp of the shea nut also serves as a nutritious snack during this time and is sold as shea fruit in local markets. The nuts are then washed to remove dirt and pulp remnants, and then parboiled with firewood as a source of heat. The nuts are then dried in the sun with an oven (the method is used during the rainy season by better-equipped processing centres) to reduce the moisture content and then de-husked with a mortar and pestle as well as stones. Only the kernels are picked, and the husk is left behind. After de-husking, the good kernels are sun-dried and stored in a clean and dry environment, mostly in bags and basins, either for further processing or until the need to sell them in local or international markets arises.

(b) Processors: The processor is the machine that converts shea kernels into shea butter. It is a tedious and time-consuming process. This study found that this process is mostly carried out by women, as shown in some of the pictures and statistics on the demography in section 1. To produce the shea butter, the sorted kernels are roasted; this is believed to help ease the extraction of the oil from the kernels. To use a partially mechanized format, after roasting the kernels, they are milled into a paste by grinding with a machine and left until the next day for kneading. Kneading (i.e. thorough and systematic mixing) is a mechanical process done manually with the hands; cold or hot water is added to the paste until it gives a smooth texture. The paste is then fried in a pan and left to settle, after which it is sieved and mixed to yield shea butter. The paste can also be boiled in large pots with water for several hours, and the shea butter rises to the surface and is scooped up with a plastic container or calabash, after which it is allowed to cool; the boiling gives the butter a lighter colour, denoting purity, and is preferred. The solidified butter is packaged into five-litre metal cans and twenty-five-litre plastic containers for storage and sale.

(c) Trading/marketing/exporting: This is the stage of the shea butter supply chain where men are actively engaged, though women still dominate. Shea butter traders can be divided into rural assemblers, wholesalers, retailers, and exporters. They serve as middlemen.

(i) Rural aggregators/assemblers: This group of middlemen undertakes the initial task of assembling the shea butter products from the shea nut pickers or processors. They may be landlords, village shopkeepers, wholesale merchants, processors, and cooperatives. The rural aggregators/assemblers may either act on commission or purchase on their account.

(ii) Wholesalers: This group plays a central role in the marketing of shea products. They take the shea butter products from the processors or rural assembles and sell them to the retailers, other wholesalers, and industrial users, but do not sell them in significant amounts to final consumers in domestic and foreign markets or manufacturers. They are characterized by selling products in bulk. They may be cash-and-carry or service wholesalers, extending credit and offering delivery and other services. Wholesalers in the study area may finance the movement of goods themselves, and in general, they bear most of the marketing risks.

(iii) Retailers: The retailers obtain supplies and display them in a variety of formats and at times and locations that are convenient for consumers. Their task is to provide a wide variety of shea butter products at a single location, making it convenient for consumers to assemble the desired market quantity and quality of shea butter products. Usually, the retailers buy shea butter products from one or more wholesalers, sometimes on credit, and serve consumers who buy smaller quantities daily.

(iv) Exporters: They buy shea products both in raw form (shea nut) and in semi-processed form (butter) in large quantities. The export season for shea nuts commences in June and ends in October. The main buyers of shea nuts and shea butter are chocolate manufacturers, cosmetic industries, pharmaceutical industries, etc. The major destinations for Niger State shea nut and butter exports are the European Union and Japan.

5.5.2 Distribution based on the locality of preservation

A collective organisation must be established at the core of the efforts to promote unique products of origin.

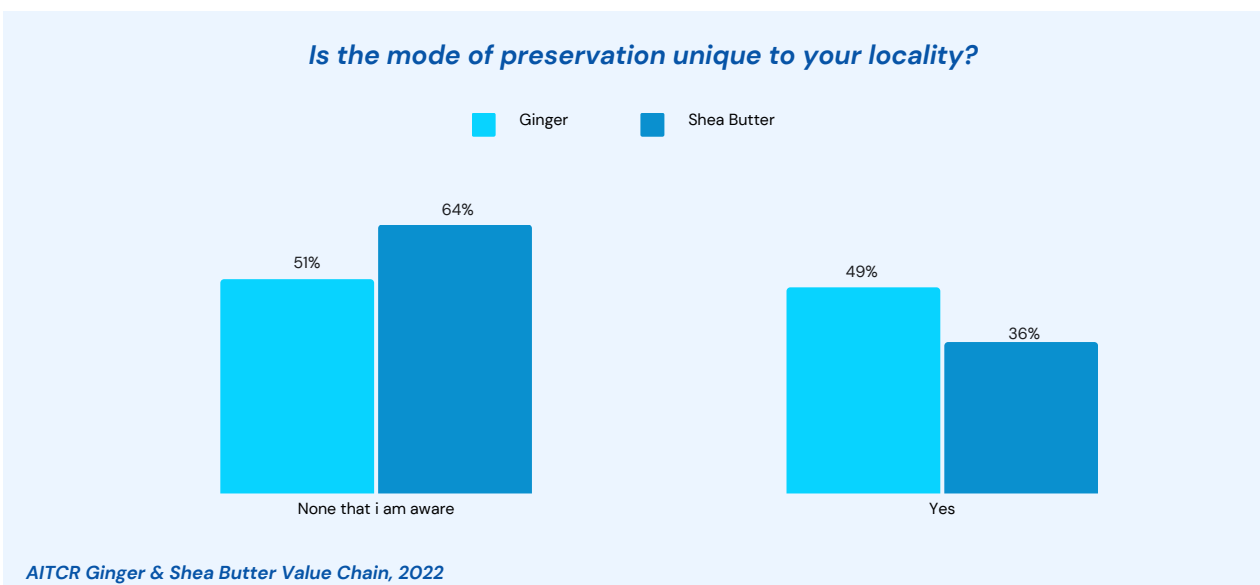


Figure 28: Graphical illustration based on locality of preservation

According to Figure 29, 36 percent of shea butter respondents admitted that the method of preserving shea butter is unique to their locality. 49 percent of the ginger respondents claimed that their method of preserving ginger is unique to their locality. In contrast, 64 percent of shea butter producers claimed that they were unaware of any method of preservation unique to their locality. 51 percent of ginger respondents were not aware of the local method of preservation

Preservation is significant in shea butter's shelf life. The singular activity of most of the settlers is shea butter production. The photograph to the left is of a warehouse donated to the shea butter cooperative in Tede (Atisbo LGA), Oyo State, Nigeria. The small town has not less than 15 shea butter processing centres with no intervention or support from government or private organizations. Even though noted to be the largest producer of shea butter in Oyo state lack of support in terms of the availability of modern processing facilities remains the greatest setback.



A shea butter warehouse donated by Shea Origin to Shea butter cooperative society at Tede (Atisbo LGA) Oyo State Nigeria

Source: AITCR Survey, 2022



A cross-section of workers at a shea butter processing centre at Tede (Atisbo LGA), Oyo State

Source: AITCR Survey, 2022

Most of the processing centres in Tede make use of the traditional local method of processing, which in most cases fails to measure up to the global standards.

5.5.3 Longevity of the traditional process of production.

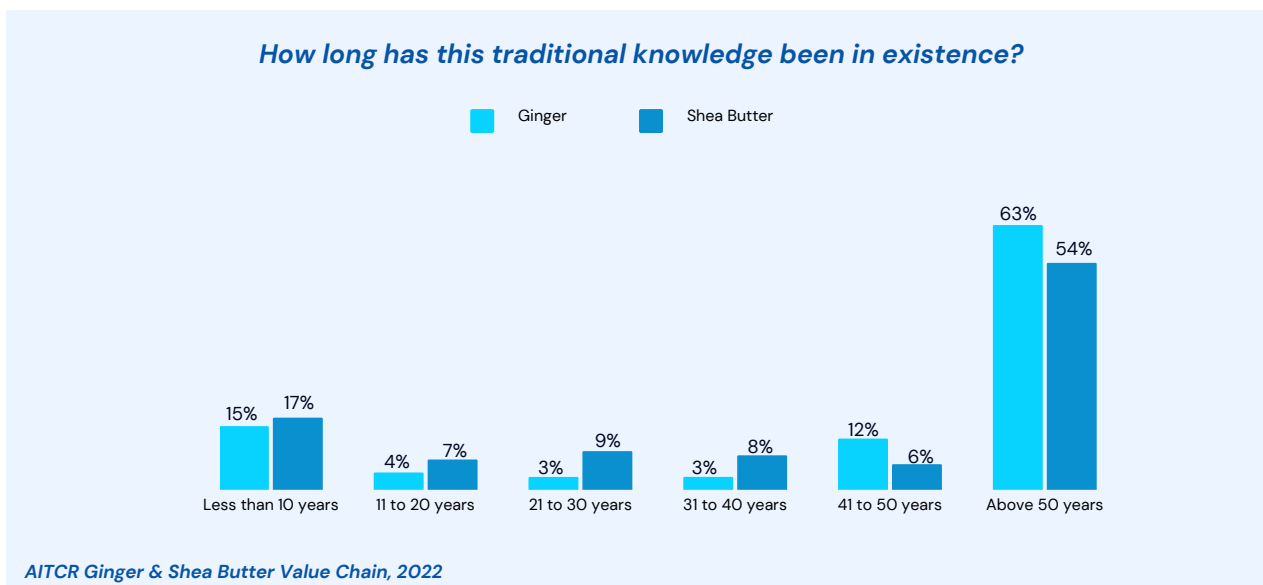


Figure 29: Representation of longevity of traditional knowledge.

According to Figure 29, 54 percent of the shea butter respondents who claimed the existence of traditional knowledge of production asserted that it has existed for over 50 years. This percentage dominated the other categories of respondents that claimed less than years of the existence of traditional knowledge. On ginger, 63 percent of respondents are aware of the traditional method of production, which they claim has been in existence for over 50 years dominating other respondents that opted for lesser years of existence. These outcomes lend credence to the longevity of shea butter production and ginger farming in these areas.

5.5.4 Conformity with international best practices.

Conformity to global standards, such as no use of child labour, hygiene, environmental protection, and sustainable development goals, is fundamental to unique product identification and further qualification for global recognition through GI status certification. Below is the representation of the various responses obtained on the product's local production conformity to international best practices.

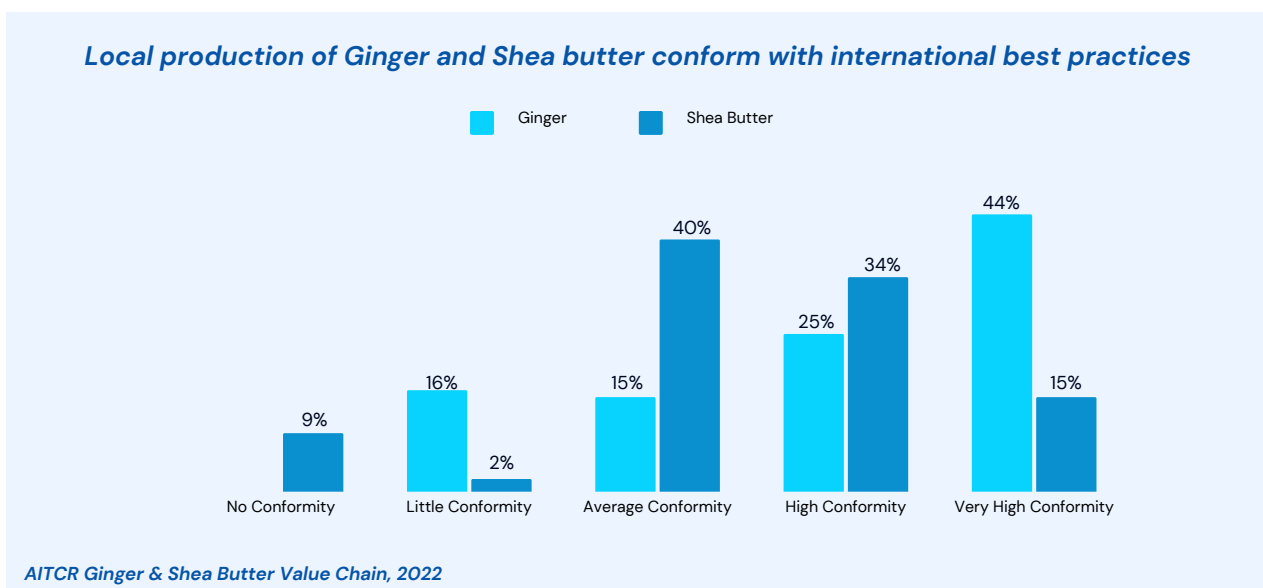


Figure 30: Graphical illustration of conformity Level with international best practices.

Analysis of the conformity status revealed that ginger producers conform better to global best practice than shea butter producers. 44 percent of ginger producers ranked the conformity to a very great extent, while 34 percent of the respondents asserted that the production conforms highly to global best practices. 40 percent were of average conformity. On average, most producers conform to global standards regarding environmental protection, sanitary measures, the non-existence of child labour, and many more. On the other hand, 40 percent of shea butter producers, the highest representation of shea butter producers, were in average conformity with global standards. This is evident in the high number of



Picture 3 Source AITCR field picture of a processing centre

processing activities carried out under tree covers instead of a modern constructed building. In many processing centres in Tede, shea butter seeds and processed ones are spread on the bare floor, as indicated in picture 3 below. However, a better processing plant conforms to standards in Saki, Oke –Ogun Area of Oyo State. Although in production, they generally lag behind Tede. Also, Minna, Niger State, North Central region of Nigeria, has modern processing sites where shea butter is been produced and the National Association for Shea Products in Nigeria (NASPAN), with the support of the Nigerian Export Promotion Council (NEPC), is setting up several other production sites for shea products in Niger State.

5.6 Descriptive Analysis of Market and Pricing strategy

This section evaluates the market and pricing of ginger and shea butter in the domestic and international markets. The ginger market size globally has been on an upward trajectory in recent years. On a general level, shea butter is being driven by the rapid development of cost-effective cosmetic shea products from the United States, growing consumption of bakery and confectionery products in Europe; and rising living standards accompanied by a rise in consumer purchasing power to support the butter industry’s growth in the Asia-pacific.⁴³ This rise in global demand is positively impacting Nigerian ginger production, evident as one of the country’s valuable non-oil export products, with current ginger production put at 31 million⁴⁴ metric tonnes (MT), while demand is put at 65 million MT.

5.6.1 Analysis of period with highest Sales.

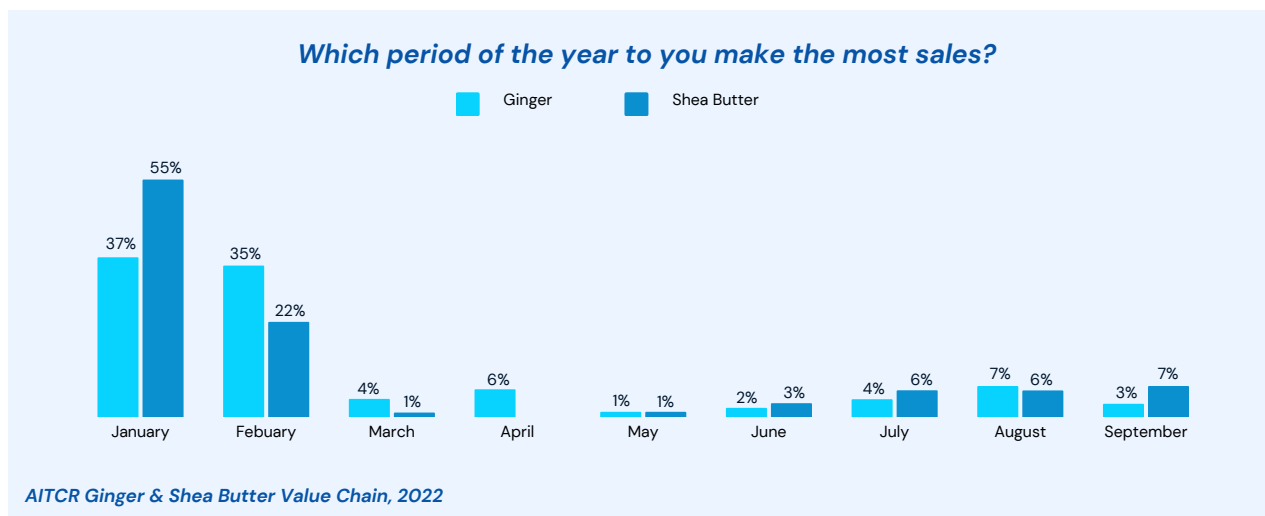


Figure 31: Graphical illustration of period respondents make highest sales

Flowing from figure 31 above, both ginger and shea butter command the highest sales in January and February. 55 percent of shea butter respondents asserted that they make their highest sales in January, while 22 percent made their highest sales in February. Although shea butter sales revolve around the years, most respondents make their highest sales within two months, i.e., January and February. 37 percent of ginger respondents (farmers and other mid-segment value chain actors), representing the largest proportion, make their highest sales in January, while only 35 percent record their highest sales in February. The sales of ginger are year-round, but the proportion of respondents that record the highest sales in other months is generally low from March to July

5.7 Distribution-based association related to your product

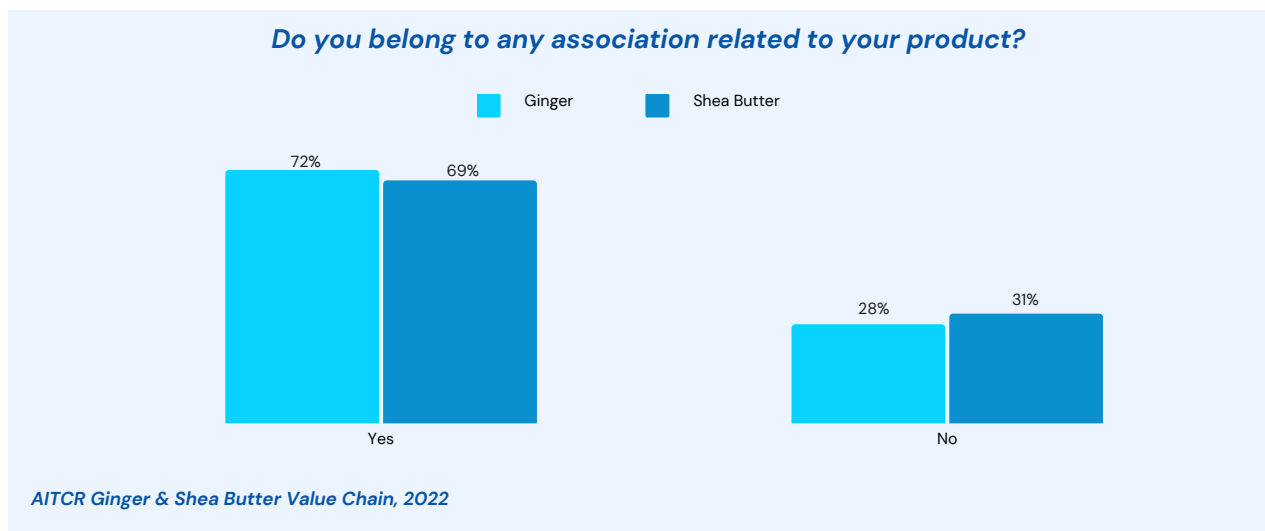


Figure 32: Graphic distribution of membership of the association

In the GI product certification process, the existence of a strong value chain and association is key. From the field, as indicated in the figure above, the majority of the producers do not belong to any association. 72 percent of ginger producers and marketers do not belong to any association. 69 percent of shea butter producers and marketers are also unaffiliated. Only 28 and 31 percent of ginger and shea butter producers and marketers, respectively, belong to an association. A comprehensive list of these associations is contained in the appendices below.

5.7.1 Distribution based on mode of transportation

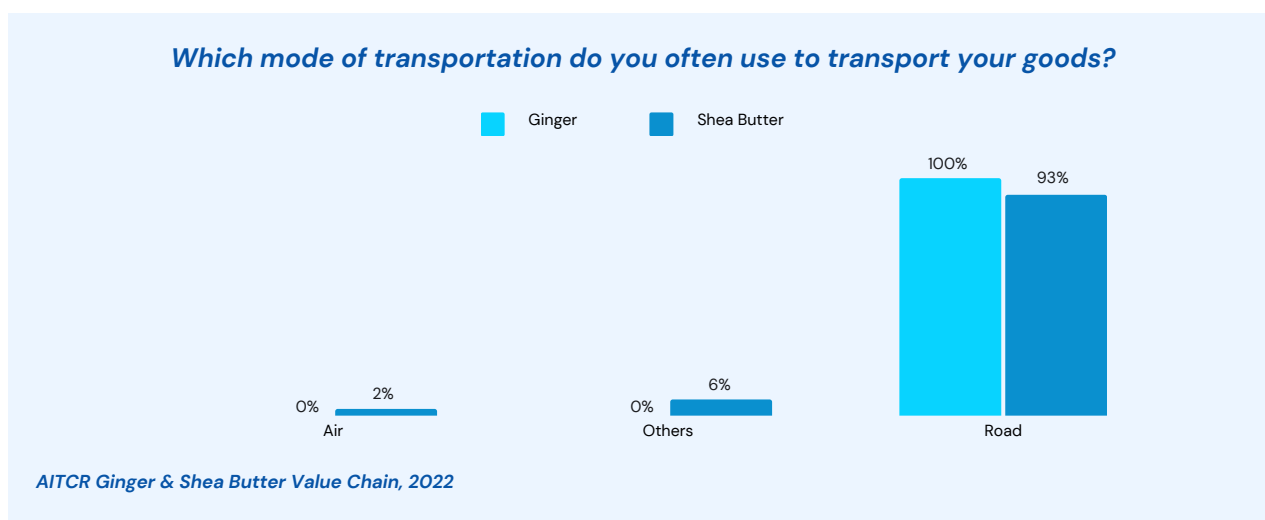


Figure 33: Graph of mode of transportation for the product

Based on findings from the field, the most often exploited means of transportation for shea butter and ginger, is road transportation. All the respondents asserted that the road solely carries out the movement of ginger. 93 percent of the shea butter attested to a similar mode of transportation. 6 percent make use of other means of transportation, while 2 percent make use of air transportation. The dominance of road transportation is explainable based on the fact that road transportation is easily accessible to the producers and marketers of the products.

5.7.2 Distribution based on challenges during transportation

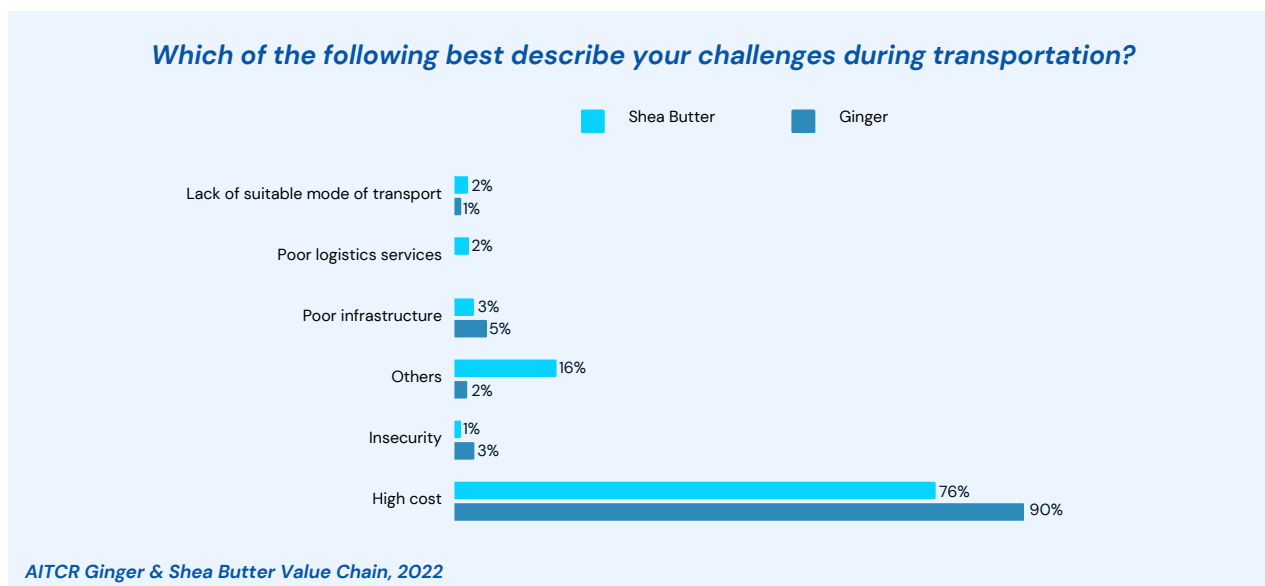


Figure 34: Distribution based on challenges during transportation.

While road transportation remains the major mode of transportation, it has some challenges. The majority of the respondents asserted that the high cost of transportation was the major challenge they faced using road transportation. On this, 90 percent of ginger respondents asserted that the high cost of transportation is the major challenge experienced. Similarly, 76 percent of shea butter respondents claimed that the major challenge of road transportation is the high cost. According to some respondents, based on field interaction, many of the processing centres do not have good access roads. This, according to the producers, makes it difficult for customers to reach them. Other challenges registered by the respondents range from insecurity to poor infrastructure and logistics service.

5.7.3 Distribution of form of support for your business

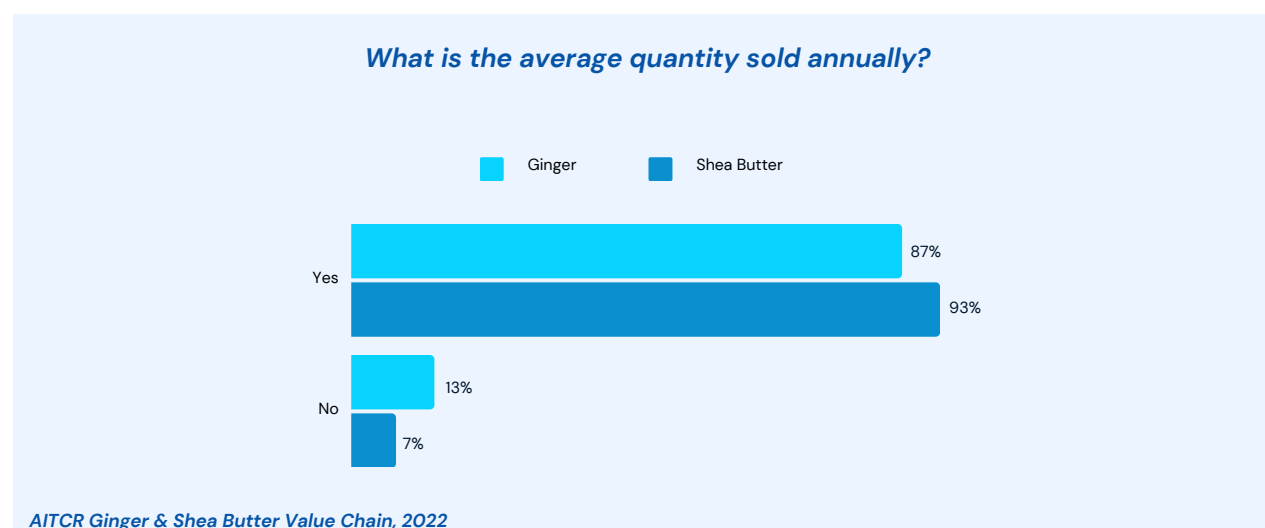


Figure 35: Graphic Representation of distribution form of support for your business

The graphic representation above reveals that most respondents had not received any form of support for their business. This was true for 93 percent of ginger and 87 percent of shea butter producers and marketers, respectively. Upon further interaction with shea butter respondents across Kaiama Local Government Area in Kwara State, Saki and Tede (Atisbo LGA) in Oyo State, Minna, Bida and Shatta in Niger State, they indicated that little or no support had been offered to them in the business. From the field, as revealed in the figure above, only 13 and 7 percent of ginger and shea butter respondents have received any form of support for their business. This aligns with findings from the field as one of the respondents clearly stated that *“most of the support and intervention by the government is hijacked by middlemen who are most of the time non-players, skimming out farmers and producers who are major actors in the value chain of the intervention.”*

5.7.4 Distribution of based on nature of Support received

Detailed finding of the nature of support received is analysed below.

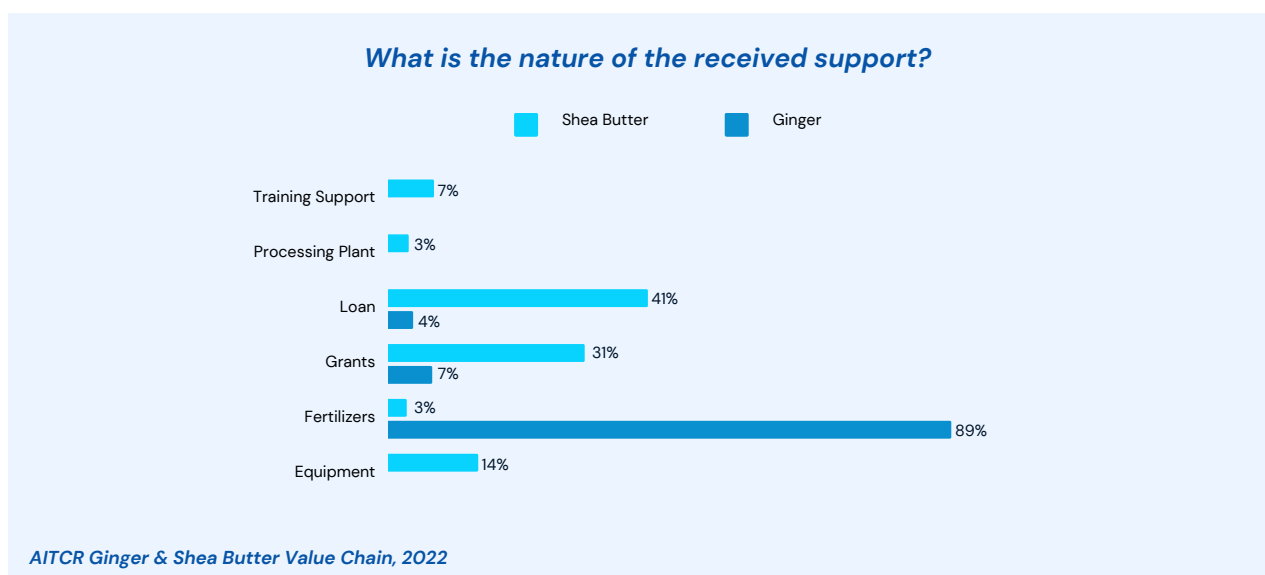


Figure 36: Graphical Representation of distribution form of support for your business

From the figure above, the nature of support received by ginger farmers and marketers in the ginger value ranged from fertilizer grants to loan support. 89 percent of those who have been supported indicated that the support came in the form of fertilizer to boost the yield of their output, 7 percent asserted that they received grants, and 4 percent revealed that they received loans. Support received by shea butter respondents covers equipment received by 14 percent. Of those that received support, fertilizers received by 3 percent, grants received by 31 percent, loans received by 41 percent, processing plant by 3 percent, and training received by 7 percent of the respondents. From further evidence as to whether the support received by the respondents addressed their need (graphical representation contained in the appendices), 85 percent of the ginger respondents admitted to the positive, while 15 percent indicated to some extent. In the same vein, 59 percent of shea butter respondents that received such support asserted a positive, while 39 percent affirmed that it was to an extent. Only 4 percent indicated that the support received did not meet their need.

5.8 Presentation of Profitability Analysis of Ginger and Shea Butter

Shea butter and ginger are regarded as two of the most profitable products in the country. This is mostly due to the global recognition of the uniqueness of Nigerian ginger and shea butter. Ginger and shea butter are economic crops demanded all over the world. This makes them important commercial products with a great export value in world trade. This section examines the profitability level of both products' value chains and analyses the factors affecting their profitability.

7.8.1 Distribution based on the period of highest profitable

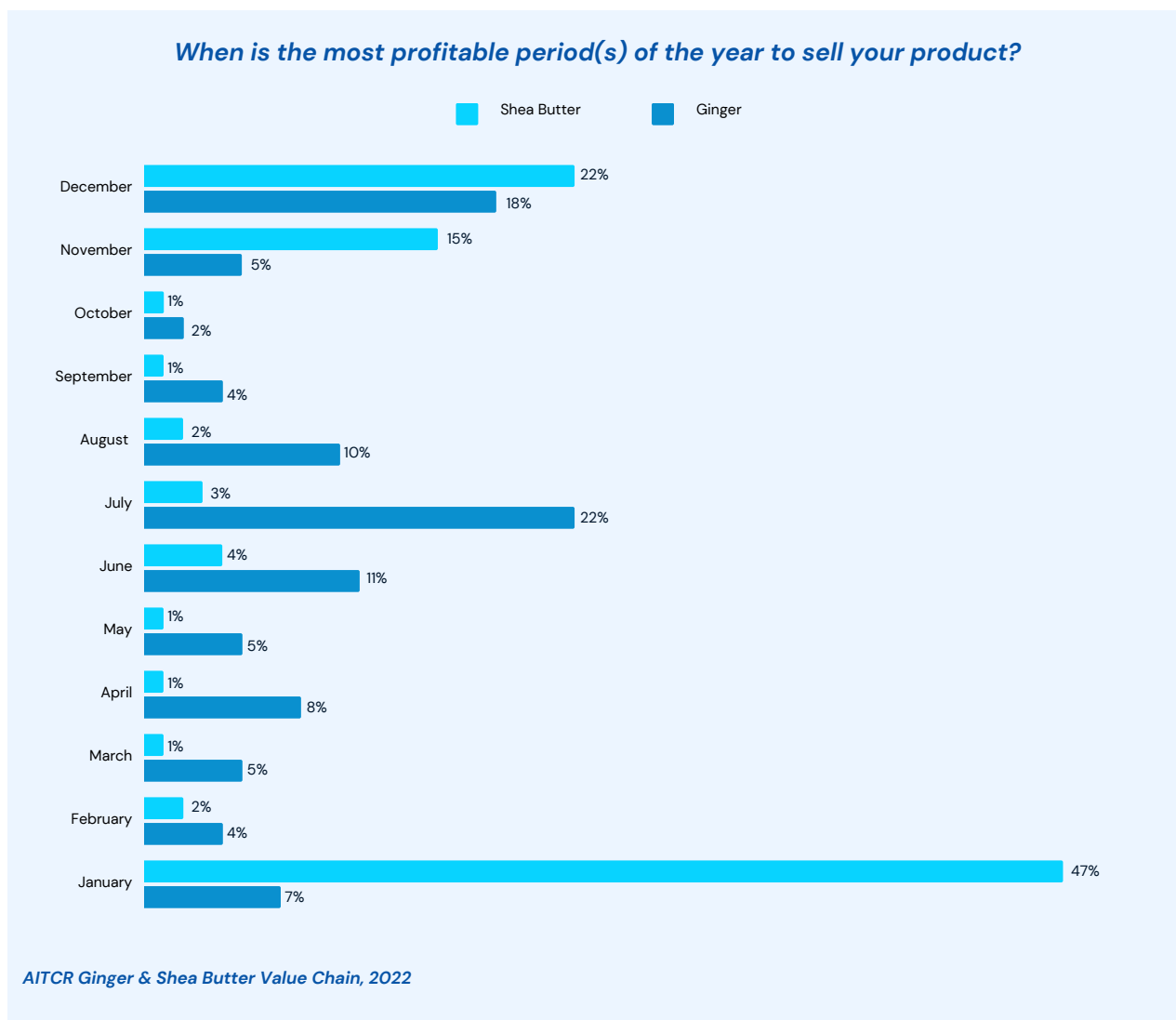


Figure 37: Distribution based on a respondent most profitable period(s) of the year to sell your product

From figure 37 above, the most profitable period for the sales of shea butter ranges from November to January based on the frequency of respondents. 15, 22, and 47 percent averred that the most profitable period to sell their product are November, December and January, respectively. These periods are most significant compared with other months in the year, although profit is made throughout the year. 4, 3, and 2 percent of the respondents asserted that they make the most profit in the month of June, July and August, respectively. In any other Months only, 1 percent each of the respondents make the most profitable sales. Also, from the figure above, the most profitable period for the sale of ginger is far more evenly spread throughout the year than shea butter. However, based on the frequency of respondents, the highest profit based on sales is made in June, July, August and December with 11, 22, 10 and 18 percent of the respondents accounting for this, respectively. This is corroborated by evidence from the field as this period is when the rhizomes become scarce shortly after the planting season. 7 percent said they made the most profits in January, while 8 percent stated that they made the most profits in April. The level of profitability recorded by the respondents is corroborated with field data placed in the appendices on sales increment. The data revealed that 97 percent of ginger respondents recorded sales increases over the years, while 87 percent of shea butter respondents, notably producers and marketers, recorded sales increases over the years.

5.8.2 Analysis of most profitable customers

A further composition of the profitability analysis in figure 49 was carried out to reveal the categories of buyers that constitute the bulk of the respondents' profit.

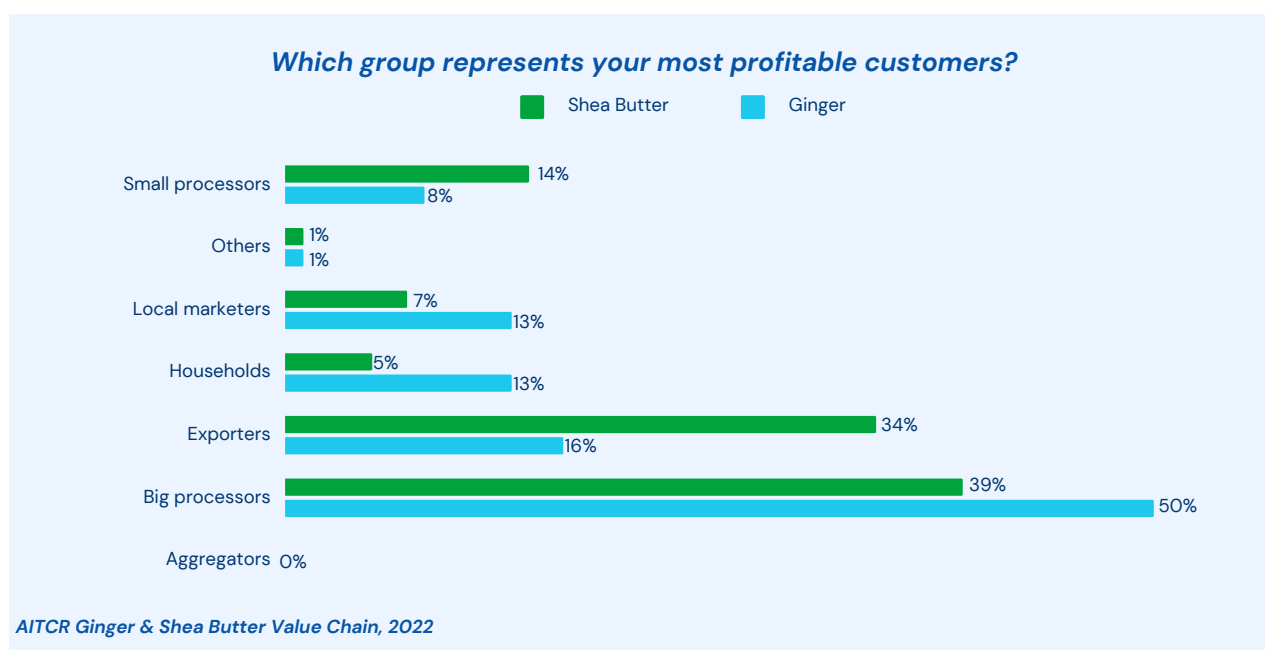


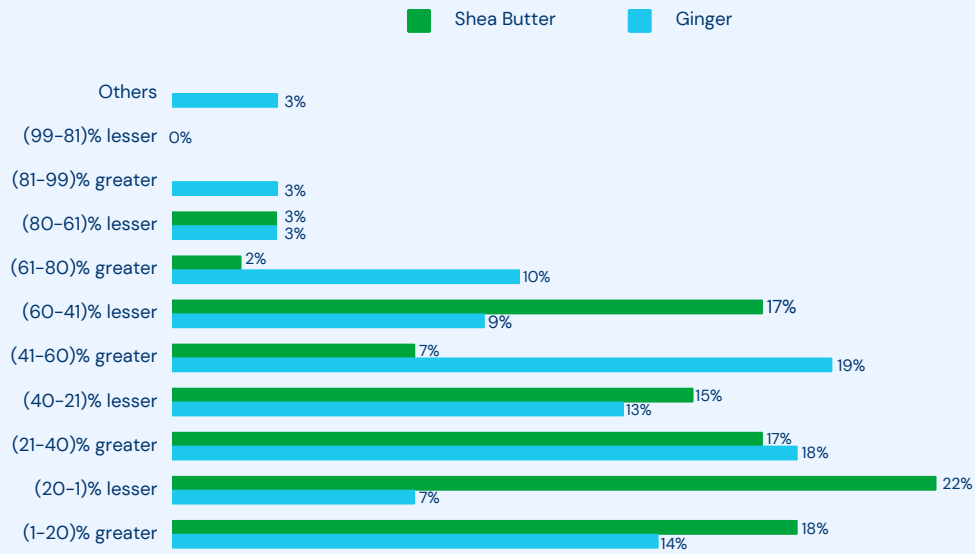
Figure 38: Analysis of most profitable customers

According to the above graph, large processors constituted the most profitable consumers of ginger based on the volume of purchases accounting for 50 percent of ginger respondents. Similarly, big processors represented the most profitable consumers of shea butter accounting for 39 percent of shea butter respondents. Following this are exporters who accounted for 34 and 16 percent of shea butter and ginger's most profitable customers. A sizeable proportion profit for shea butter was accounted for by small processors, while local marketers accounted for 7 percent of the most profitable consumers of shea butter. Households accounted for only 5% of the most profitable consumers of shea butter. Households and local marketers accounted for 13 percent of ginger's most profitable consumers. Aggregators accounted for nothing in the respondents' most profitable consumers. This was underscored by the fact that a very small number of respondents have a contract with aggregators, as depicted in figures 40

5.8.3 Margin is your Cost of Production less than or greater than your Revenue

A revenue and cost analysis for ginger and shea butter reveals the level of production efficiency and market share as a critical metric of planning and product value chain development. This section analyses and tracks both product value chains' progress over the years, while the cost analyses help indicate the expected costs of products, assets, and plans of action.

By what margin is your cost of production less than or greater than your revenue?



AITCR Ginger & Shea Butter Value Chain, 2022

Figure 39: Margin on cost of production less than or greater than revenue

From figure 39, 22 percent of shea butter respondents affirmed that their cost of production is 1 to 20 percent lesser than their revenue, 17 percent stated that theirs is 41 to 60 percent lesser than their revenue. 15 percent asserted that their cost of production is 21 to 40 percent lesser than their revenue. Only 3 percent of the shea butter respondents have their cost of production between 61 to 80 percent lesser than their revenue. Statements from the majority of the shea butter producers reveal that the business is profitable, although sometimes they may break even or have to struggle with challenges already analysed. However, a sizeable percentage recorded a loss. For 18 percent of shea butter respondents, their cost of production was 1 to 20 percent higher than their revenue, while 17 percent stated that their cost of production is 21 to 40 percent higher than their revenue. According to some of the shea butter producers, this arises from a decline in revenue because production costs keep escalating. As a result, shea butter prices are increased to net off the effect, but most of the time, adoption of new technology and improvement in cost controls are advised to bring the percentage down. In fewer cases, some of the producers have to shut down, as observed in the Saki area of Oyo State.

From the same figure 39, 18 percent of ginger respondents affirmed that their cost of production is 21 to 40 percent lesser than their revenue, 3 percent stated that 61 to 80 percent lesser than their revenue. 7 percent asserted that their cost of production is 1 to 20 percent lesser than their revenue. 9 percent of the ginger respondents have their cost of production between 41 to 60 percent lesser than their revenue. Another 3 percent of the respondents stated that their cost of production is 81 to 99 percent less than their revenue. Generally, 43 percent of ginger respondents have their cost of production lesser than their revenue. This corroborates field evidence as most of the producers own the land, and receive support from friends and family members in the form of tilling of the soil, planting rhizomes, and weeding the farm. However, a greater percentage of the ginger respondents, notable producers, have a rising cost of production. This category is mostly for farmers who hire plots of land to cultivate and, after applying fertilizer that is supposed to increase yield for three to four years, might get an evasion notice from land owners. This was predominant among farmers in the Uke and Keffi axes of Nasarawa State.

5.9 Analysis of Exporters' performance

The importance of this section is underscored by the Nigerian export performance on ginger and shea butter exports in recent years combined with the magnitude of foreign exchange proceeds in subsequent years. Past findings on Shea butter revealed that it is capable of fetching the country a foreign exchange earning of over \$10 billion annually, with value addition and internationally acceptable packaging standard compliance.⁴⁵ According to Nigeria's Export Statistics, 23% of the country's GDP comes from ginger exports. It, thus, offers a viable non-oil export option for Nigeria. The section analyses the export sales volume and profit per annum of ginger and shea butter. The analysis would elicit future tactical steps in ginger and shea butter value chain enhancement in the light of economic experts' analysis which put the earnings figure by Nigeria at a grossly insignificant level on the global scale.

5.9.1 Analysis of Export Frequency

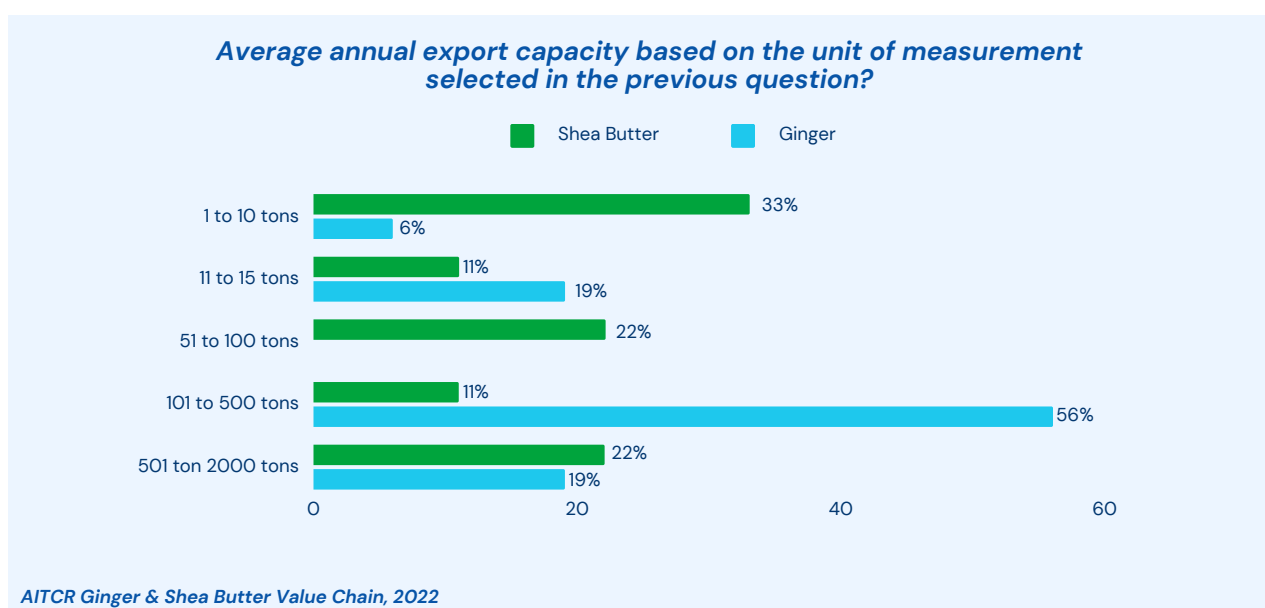


Figure 40: Distribution of export capacity

Figure 40 reveals the magnitude of the ginger export volume per annum. From the figure, the largest percentage of ginger, representing 56 percent of ginger exporters, captured by the study, export between 101 to 500 tons per annum; a median score would also yield this volume of export. 19 percent of ginger exporters export between 501 to 2000 tons. More than 19 percent of the exporters export between 11 to 50 tons per annum, while only 6 percent of the ginger exporters exports between 1 to 10 tons per annum. On the other hand, the largest proportion of shea butter exporters export between 1 to 10 tons per annum, which is 33 percent of respondents, followed by 22 percent who export 11 to 50 tons per annum. 22 percent also export 501 to 2000 tons per annum, while 11 percent export between 11 to 50 tons per annum. The other 11 percent of shea butter export between 101 to 500 tons per annum.

Further analysis on export volume per annum finds the frequency of export per annum. As presented in figure 40, a significantly dominating proportion of shea butter and ginger exporters, representing 79 and 75 percent respectively export between 1 to 5 times per annum. Those that export between 6 to 10 times represented 11 and 13 percent of shea butter and ginger exporters respectively. 5 percent and 6 percent of shea butter and ginger exporters accounted for those with 11 to 15 times export frequency per annum. Exporters whose export frequency goes beyond 16 times were least for both ginger and shea butter accounting for 6 and 5 percent respectively.

5.9.2 Analysis of existing regular market for Ginger and Shea butter

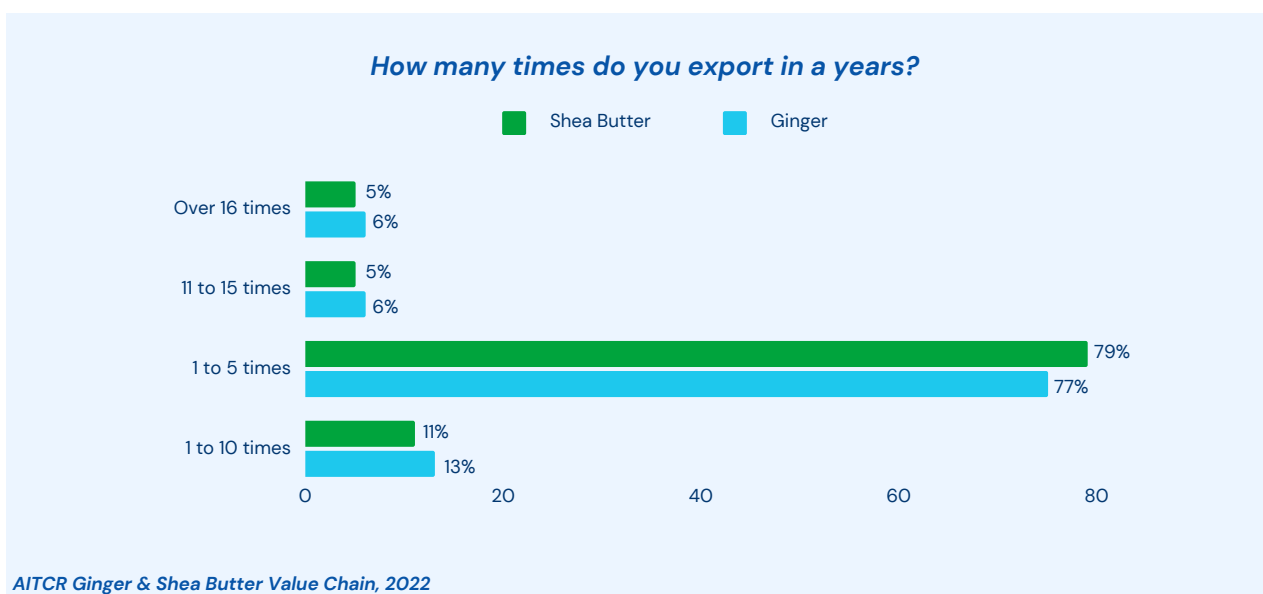


Figure 41: Distribution of export frequency

Findings on the existing market for ginger revealed that almost all the exporters of ginger and shea butter adhered to the existing regular market. 94 percent of ginger exporters averred that a regular market exists for the product, while only 6 percent differed in their opinion. On the other hand, 84 percent of shea butter exports confirmed an existing regular market for the product, while 16 percent also had differing opinions. The destination markets for both products, from the highest destination market by volume to the least, are presented below. India, Dubai, and China are the highest destination countries for ginger

5.9.3 Analysis of export earnings increment over time

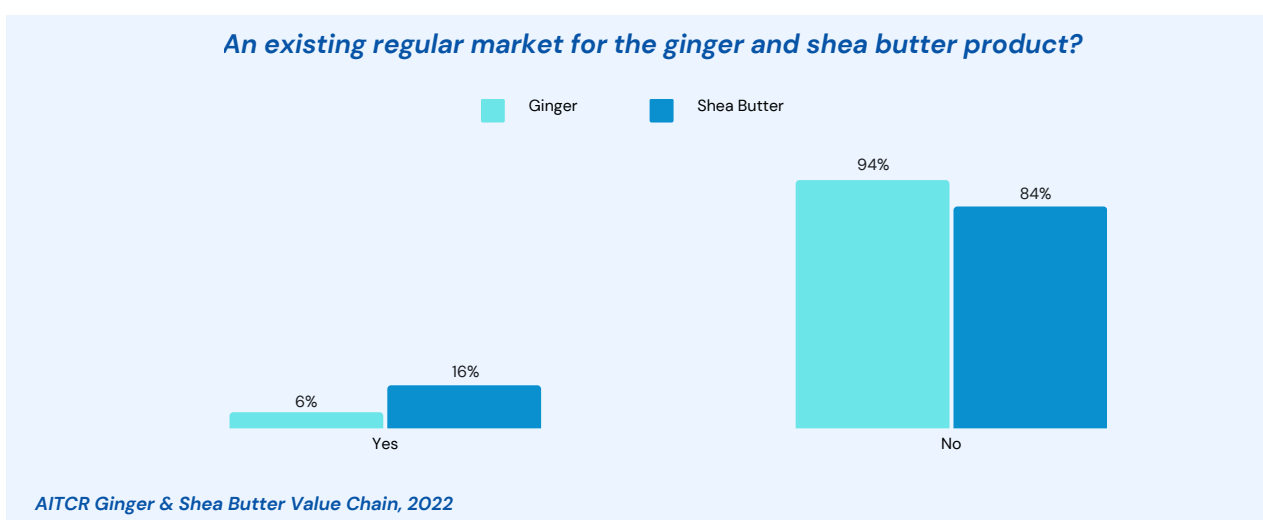


Figure 42: Graphical Distribution of respondents based on the existence of a regular market for the unique product

Findings on the existing market for ginger revealed that almost all the exporters of ginger and shea butter adhered to the existing regular market. 94 percent of ginger exporters averred that a regular market exists for the product, while only 6 percent differed in their opinion. On the other hand, 84 percent of shea butter exports confirmed an existing regular market for the product, while 16 percent

also had differing opinions. The destination markets for both products, from the highest destination market by volume to the least, are presented below. India, Dubai, and China are the highest destination countries for ginger.

List of Top Export Destination for Ginger and Volume Per annum

COUNTRIES	VOLUME (MT)	RESPONDENTS
AMERICA	100	1%
CANADA	465	7%
CHINA	1,140	14%
DUBAI	1,580	8%
EGYPT	701	2%
ENGLAND	422	11%
EUROPE	100	1%
GERMANY	1	1%
HOLLAND	300	1%
INDIA	2,851	16%
MEXICO	200	1%
NEITHERLAND	25	1%
NIGER	355	6%
RUSSIA	305	8%
SAUDI ARABIA	706	12%
SOUTH AFRICA	500	1%
UK	151	2%
UNITED ARAB EMIRATES	1	1%
USA	56	4%

List of Top Export Destination for Shea Butter and Volume Per annum

COUNTRY	VOLUME (MT)	RESPONDENTS IN %
BENIN REPUBLIC	45	4%
BRAZIL	100	4%
TOGO	270	9%
UAE	100	4%
EGYPT	104	17%

TOGO	270	9%
UAE	100	4%
EGYPT	104	17%
ETHIOPIA	2	4%
GHANA	1	4%
MALI	1	4%
NETHER LAND	500	4%
NIGER	1	4%
SUDAN	2	9%
TURKEY	4	4%
UAE	81	9%
UK	1	4%
USA	101	9%

5.9.4 Analysis of export earnings increment over time

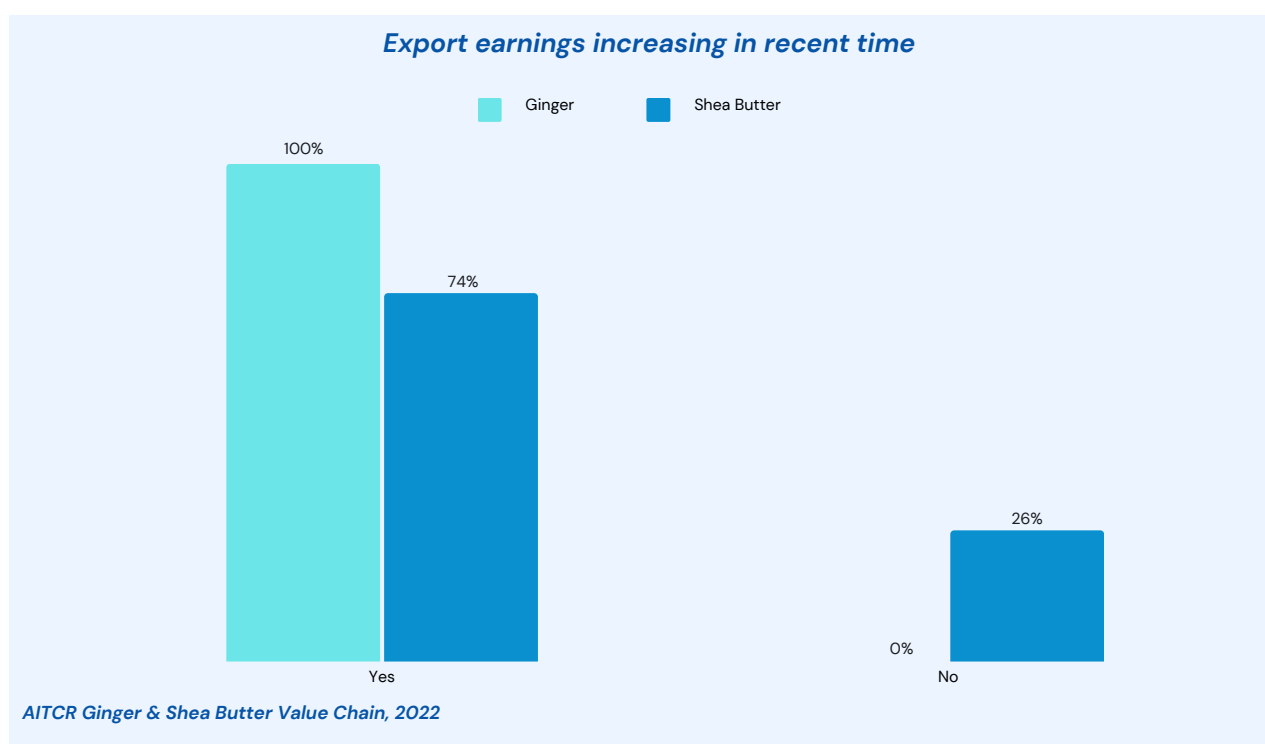


Figure 43: Have export earnings increased in recent times?

From the figure above, all ginger exporters assert that they have recently increased export earnings. 74 percent of shea butter exporters asserted to have increased their export earnings in recent times. While 26 percent of shea butter exporters claimed not to have an increase in export earnings

5.9.5 Opportunity to export the product to the International Market

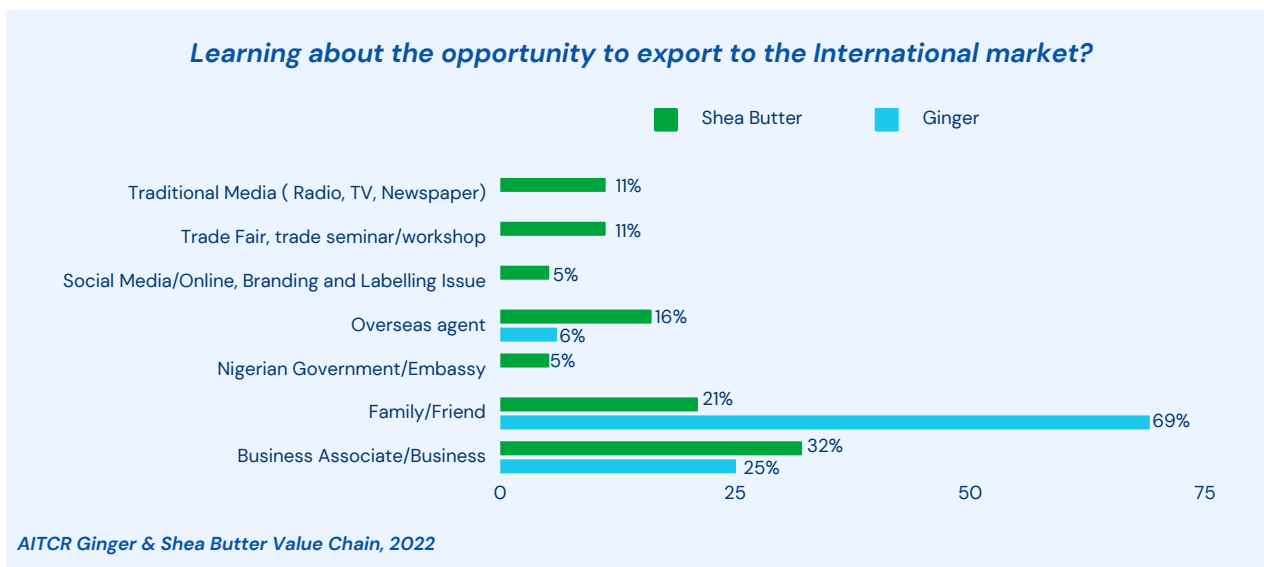


Figure 44: Graphic Distribution opportunity of export to the International market

From figure 44 above, 69 percent of ginger exporters learned about the opportunity to export through family/friends. This percentage is higher than other exporters who learnt about the opportunity from other sources. 25 percent asserted that they got the opportunity through business associates, while others, representing 6 percent of ginger exporters, learnt about the export opportunity through overseas agents. From shea butter’s perspective, 25 percent, representing the dominating proportion, learnt about the opportunity to export to overseas market through business associates. 21 percent learnt about it through family and friends, 16 percent were through overseas agents, 11 percent through trade fairs, trade seminars and workshops, and the other 11 percent learnt about the opportunity through traditional media such as radio, television and newspapers. Only 5 percent learnt about it through social media and online sources.

5.9.6 Analysis of Export Challenges

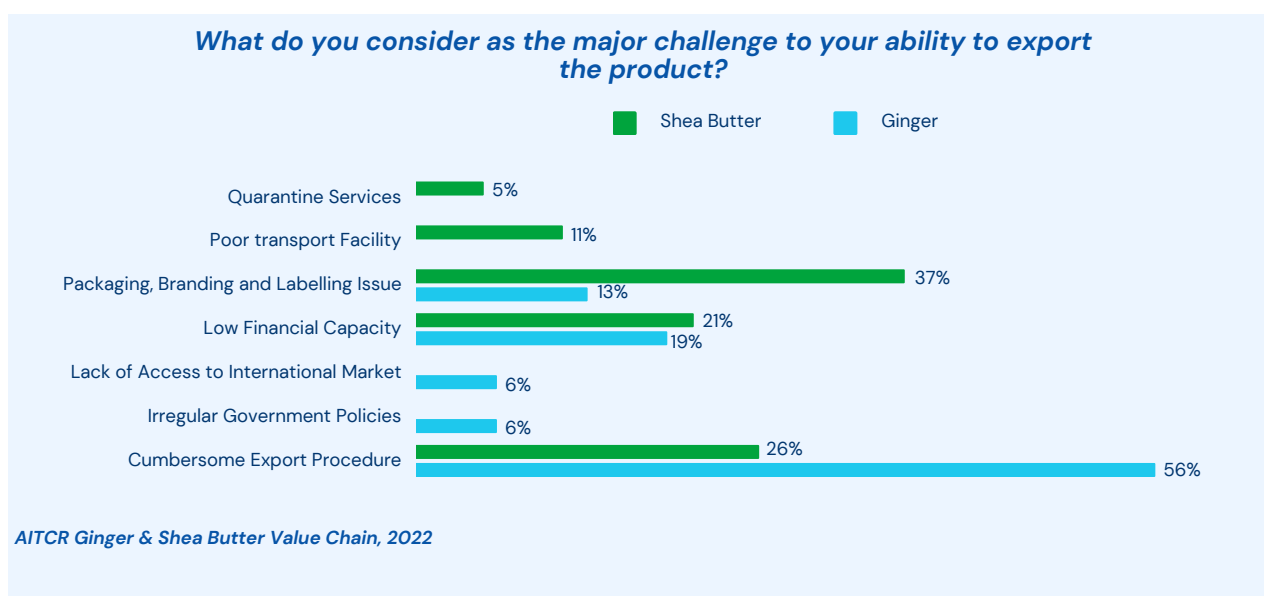


Figure 45: Percentage distribution based on export challenges

As for the challenges facing exporters as obtained from the field and graphically represented above in figure 45, cumbersome export procedures were the greatest challenge to ginger exporters, limiting their ability to export. This was stated by 56% of ginger exporters. Low financial capacity was a major challenge to 19 percent of ginger exporters, while another 13 percent were faced with packaging, branding, and labelling issues. The percentage of ginger exporters identifying irregular government policies and lack of access to the international market as a challenge represented 6 percent for each category. For shea butter exporters, 37 percent were faced with packaging, branding and labelling issues accounting for the most reported challenges among others. Following these challenges by shea butter exporters, was the challenge of cumbersome export procedures which was accounted for by 26 percent of shea butter exporters. 21 percent stated that low financial capacity was the major challenge to exporting their shea butter product. 11 percent reported poor transport facilities while 5 percent reported quarantine services as their major export challenges.

5.9.7 Analysis of Shea Butter competition

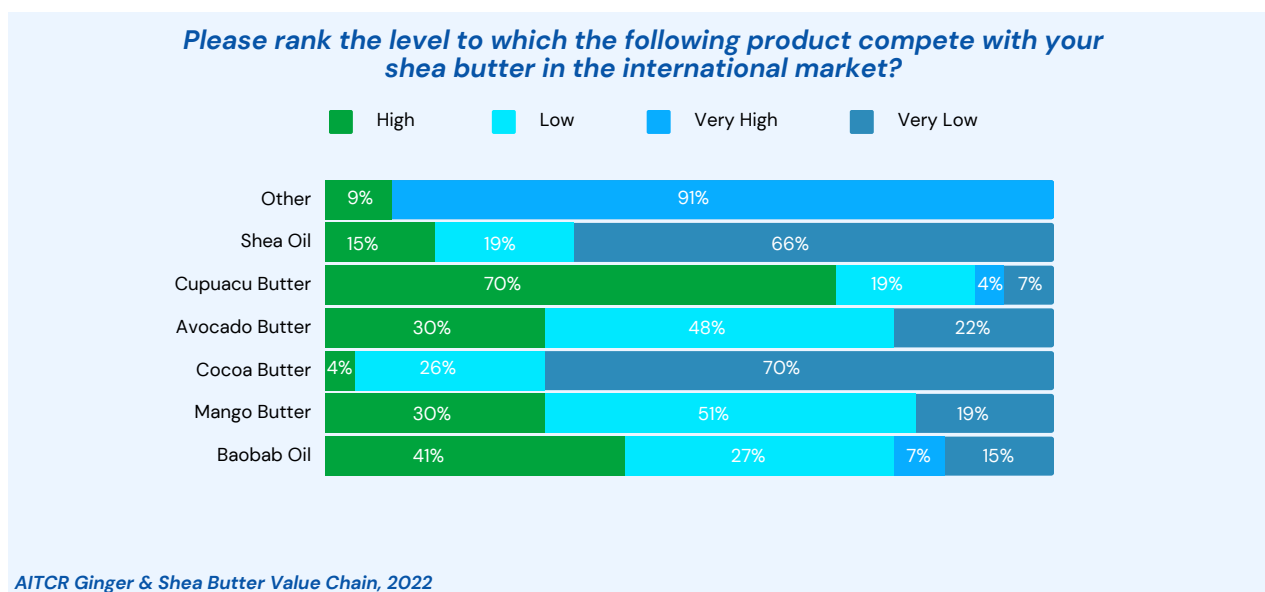


Figure 46: Graphic Distribution based on shea butter competition in the international market.

From the shea butter competition analysis above in figure 46, baobab oil is 41 percent more expensive in export value. On average, baobab oil is higher in competition to shea oil; for example, at the time of the study, the domestic market price for 200ml of baobab oil was N2500. Mango butter competition is high for 30 percent of the exporters; for 51 percent it was considered low, and for 19 percent the competition was very low. On average, mango butter has low competition with shea oil. Cocoa butter competition is high for 4 percent of the exporters, for 26 percent it was considered low, and for 70 percent the competition was very low. On average, cocoa butter has very low competition with shea oil. Avocado butter competition is high for 30 percent of the exporters. For 48 percent it was considered low, and for 22 percent, the competition was very low. On average, avocado butter has low competition with shea oil. Cupuacu butter competition is high for 70 percent of the exporters, for 19 percent it was considered low; for 4 percent the competition was very high, and for 7 percent it was very low. On average, cupuacu butter has very high competition with shea oil. Shea oil competition is high for 15 percent of the exporters, for 19 percent it was considered low, for 66 percent the competition was very low. For other categories, it was generally very high as accounted for by 91 percent of the exporters.

5.9.8 Shea butter Mandatory Conformity Assessment Programme (MANCAP) Analysis of Shea Butter competition

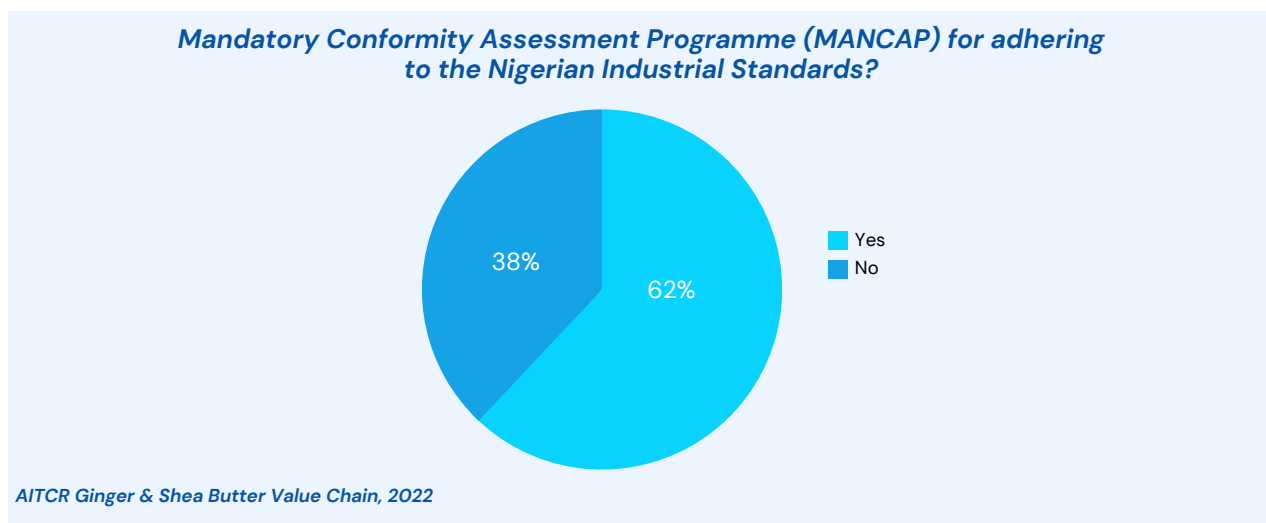


Figure 47: Percentage distribution of MANCAP

62 percent of shea butter exporters have their product certified by the Mandatory Conformity Assessment Programme (MANCAP)⁴⁶ for adhering to the Nigerian Industrial Standards, while 38 percent have not. This, therefore, reveals the necessity to drive conformity testing of shea butter by major exporters.

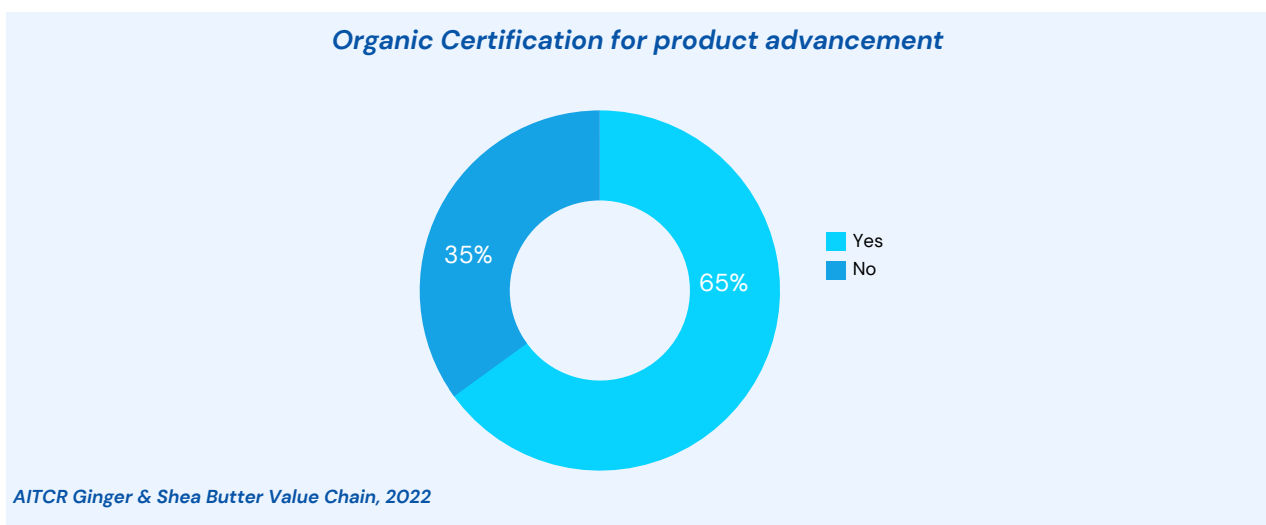


Figure 48: Percentage distribution certified organic for its premium quality and grade.

Similarly, on product certification and its organic for premium quality and grade, 65 percent of the exporters agreed to have been certified, while 35 said they had not been certified.

5.9.9 Analysis of Ginger Competition



Figure 49: Percentage distribution based on competition

From the ginger competition analysis above, nutmeg competition was very low; for 59 percent of the ginger exporters; for 33 percent it was considered low; for 4 percent of the competition it was high. Mace's competition with ginger was considered very low by 63 percent of the exporters, for 33 percent it was considered low, while it was considered high for 4 percent. Cinnamon's competition with ginger was considered very low by 63 percent of the exporters, for 33 percent it was considered low, while it was considered high for 4 percent. Allspice competition with ginger was considered very low for 63 percent of the exporters, for 33 percent it was considered low, while it was considered high competition for 4 percent of the exporters. Finally, other categories of spices competition with ginger were considered very low for 77 percent of ginger exporters, for which 18 percent of other spices were considered low, while it was high for 5 percent of the ginger exporters.

5.9.10 Analysis of Ginger Conformity with Standards

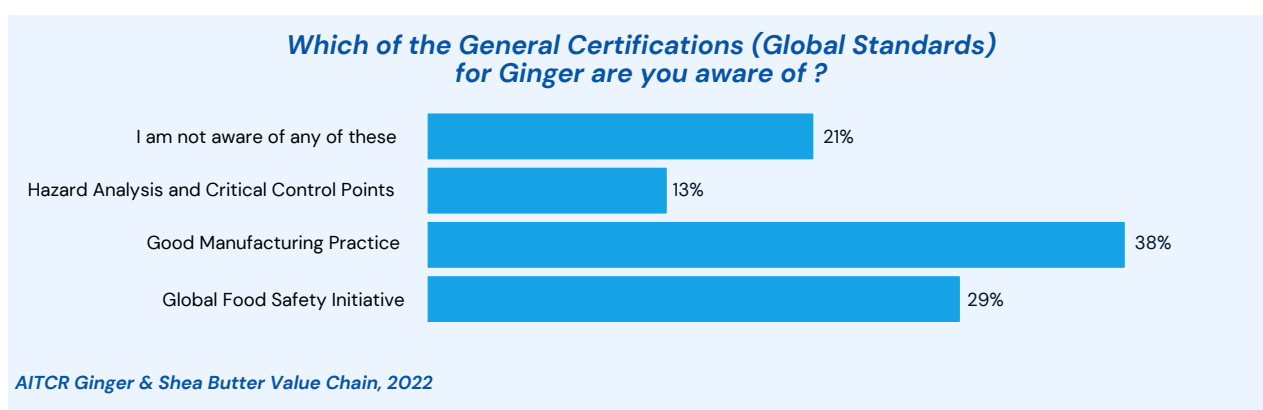
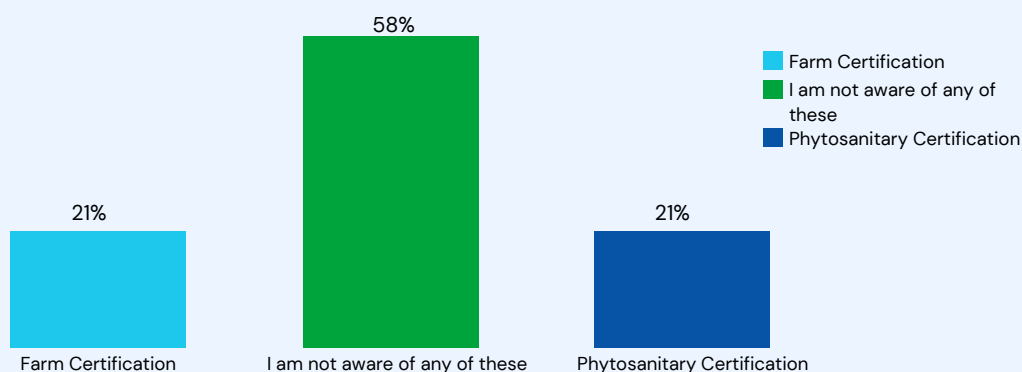


Figure 50: Percentage distribution-based Ginger conformity with standard.

Conformity with standards is considered very important in market access and, as such, the expansion of the ginger market in the international market beyond its present status requires excellent conformity with standards. From figure 60 above, 38 percent of the respondents are aware of Good Manufacturing Practices. This represents the greatest proportion of ginger exporters aware of the standards. 29 percent are aware of global food safety initiatives. 21 percent are unaware of any of the standards, while 13 percent affirmed their awareness of hazard analysis and critical control points.

Which of the Certifications of Agricultural Sector are you aware of?



AITCR Ginger & Shea Butter Value Chain, 2022

Figure 51: Percentage distribution based on respondent awareness of certifications for the Agricultural Sector.

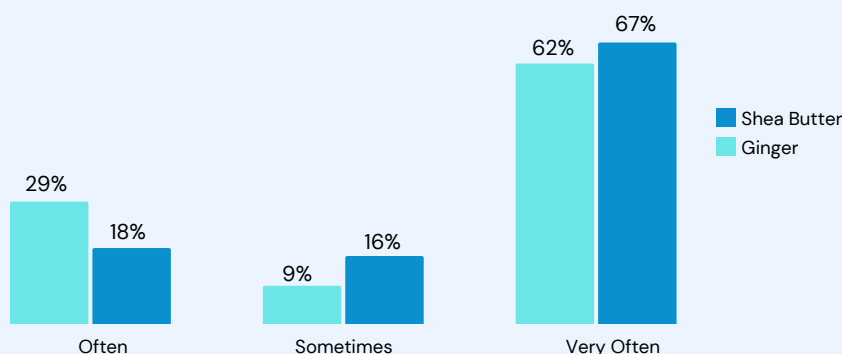
As for agricultural sector certification awareness, as represented in the figure above, more than half of the exporters are not aware of the certification process and requirements. 21 percent are aware of farm certification, while the other 21 percent are aware of phytosanitary certification.

5.10 Analysis of ginger and shea butter Customer Behaviour

General customer research revealed that global consumption patterns are unsustainable.⁴⁷ It becomes obvious that efficiency gains and sustainable consumption patterns for ginger and shea butter require background analysis for planning and enhanced development of the ginger and shea butter value chain. This section will examine various aspects of consumers' behaviour, ranging from preference analysis, purchase frequency, and final buying behaviour with respect to the unique products under examination. The outcome will enable consumers to focus on sustainable consumption while businesses integrate practices for sustainable production.

5.10.1 Analysis based on Consumption Level

How regular do you consume the product?



AITCR Ginger & Shea Butter Value Chain, 2022

Figure 52: Distribution based on frequency of consumption

The analysis revealed that ginger and shea butter are notable household consumables in Nigeria. Stemming from figure 62 above, the dominating percentage of ginger and shea butter respondents consume the product very often as indicated by 67 and 62 percent of shea butter and ginger consumers respectively. A moderate proportion representing 29 and 18 percent of ginger and shea butter consumers respectively consume the product often. The least proportion of both products' consumers consumes them sometimes, as indicated by 16 percent and 9 percent of shea butter and ginger consumers, respectively.

5.10.2 Analysis of Customer Level of Appeal

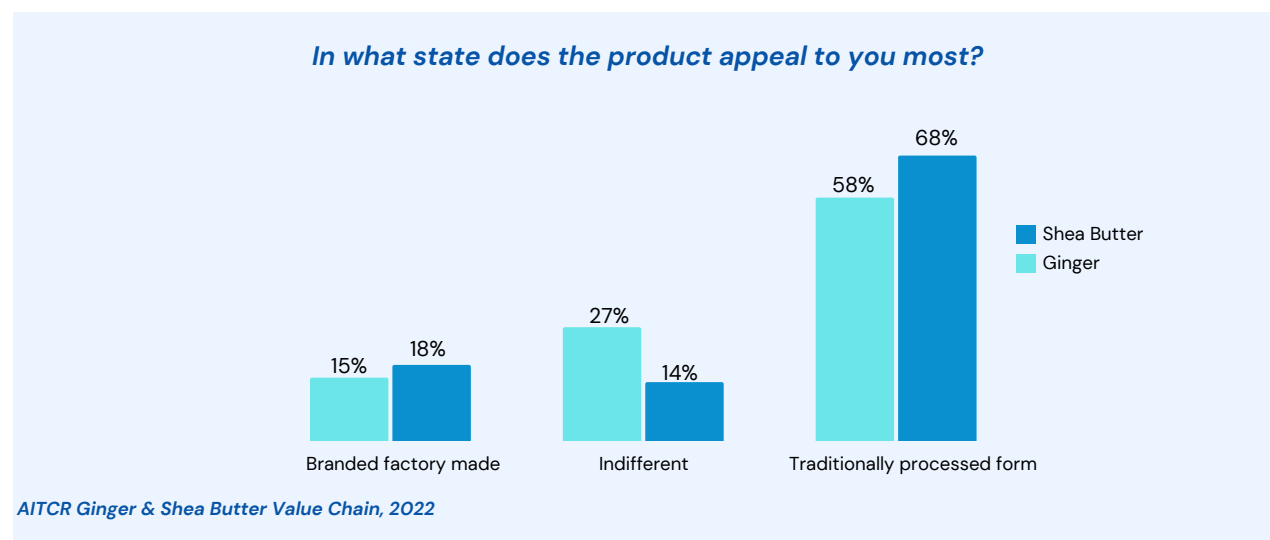


Figure 53: Distribution based on customer product preferred state for consumption

Figure 53 above shows a further analysis, which focuses on the most preferred form of the product desired. From the figure majority of the consumer-preferred the products in their traditionally processed forms as indicated by 68 and 58 percent of shea butter and ginger consumers, respectively. 18 percent of shea butter consumers preferred the branded factory-made, while 14 percent are indifferent to the state. 27 percent of ginger producers are indifferent to the state of the product, while 15 percent preferred the branded factory made.

5.10.3 Analysis of the Determinant of Customers Patronage

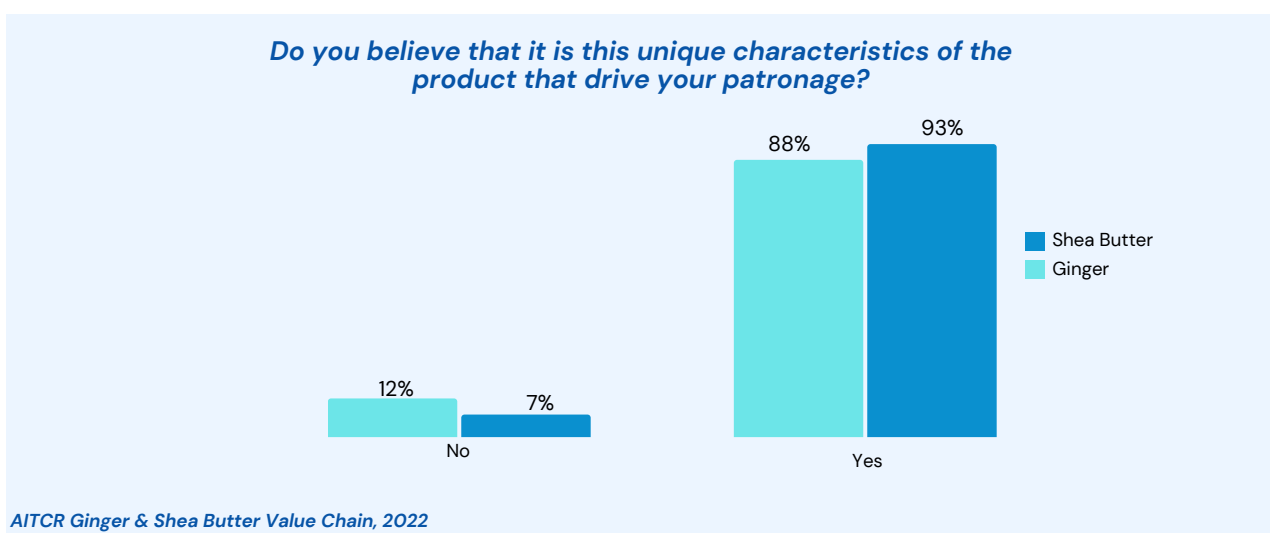


Figure 54: Graphic Distribution of respondents based on patronage drivers

The determinant of consumption, as illustrated above, revealed that for 93 and 88 percent of shea butter and ginger consumers, respectively, the product's unique characteristics were adjudged to be the dominant driver of their patronage. Only 12 and 7 percent of ginger and shea butter consumers,

respectively attributed their patronage to other factors such as price and availability outside the unique characteristics of the product

5.10.4 Analysis of Customers based on readiness for Premium Pricing

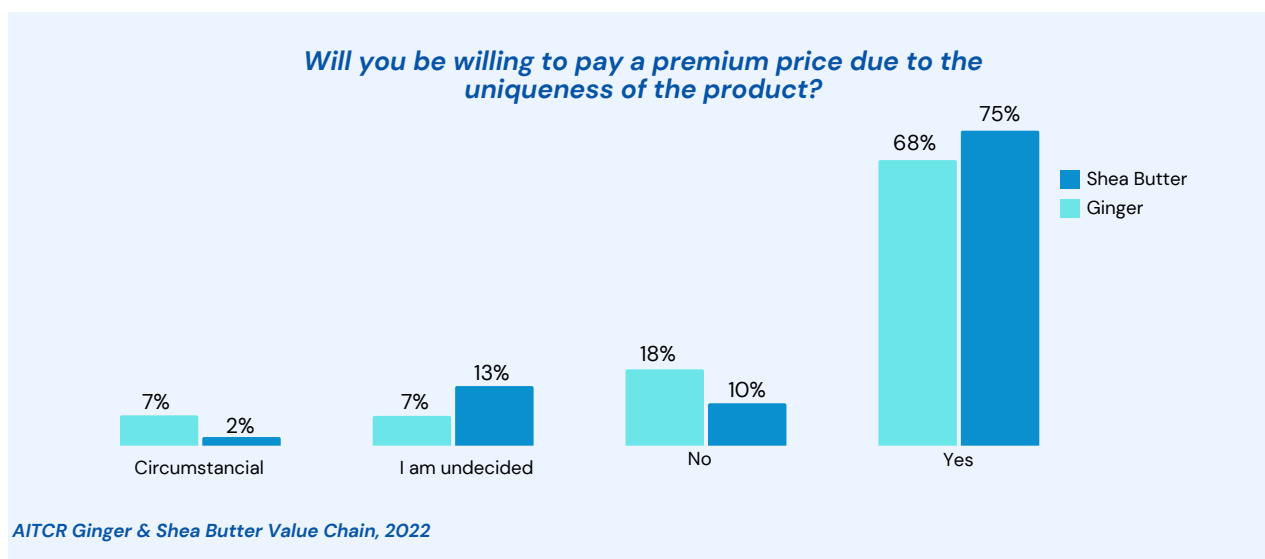


Figure 55: Premium price due to the uniqueness of the product.

The readiness to pay a premium price, as illustrated in the figure above, revealed that 75 percent of shea butter affirmed being willing to pay a premium price due to the uniqueness of the product, while 10 percent asserted no, which implies they are not willing to pay a premium price. 13 percent of the shea butter consumers are undecided, while 2 affirmed that they would pay the price under certain circumstances, such as additional value, certification, and reputable brand name. On the other hand, 68 percent of ginger consumers said they are willing to pay a premium price based on the uniqueness of the product, 18 percent indicated no, 7 percent were undecided, while the other 7 percent indicated that it was to be under certain circumstances such as, if the packaging and presentation improve, national promotion heritage, and health-wise.

6.0 Conclusion & Recommendations

The conclusion and policy recommendations for analysing the market access and value chain of Nigerian ginger and shea as potential GIs products under the Zero Oil Plan of the Nigerian government reveal that priority should be given to improving the competitiveness of these selected products in domestic and international markets. GIs is a veritable tool to promote and protect unique products linked to a specific Nigeria geographic location. The following policy recommendations have been developed as a result of the research findings.

• *Establish Sui Generic GIs Protection System*

The study found no specific legal framework for recognising and protecting GIs products in Nigeria. However, it is not sufficient to rely on the current TradeMarks Act because studies have shown that the certification marks system within the Act cannot accommodate the unique characteristics of GIs. Therefore, establishing a sui generic GIs legal framework in Nigeria, and at the same time ratifying and domesticating international protocols on GIs will accommodate and prevent unauthorized use of unique product names and ensure that rural producers' source of livelihood and cultural heritage is preserved, which will also provide assurance to consumers that the product's quality and characteristics are linked to their specific geographical origins in Nigeria. Although a draft legal framework and regulations for GIs are being fine-tuned by some institutions under the Public-Private Partnership (PPP) framework. The PPP framework includes the Africa International Trade Commerce Research (AITCR), serving as the secretariat of the project, the Federal Ministry of Industry Trade and Investment, (TradeMark Registry, Patent and Design, Trade Department) Nigerian Export Promotion Council (NEPC), and National Technical Working Group (TWG) on GIs for Nigeria, and Africa Intellectual Property Rights Innovation (AfrIPI) project with the funding support from the European Union (EU), the European Union Intellectual Property Office (EUIPO) and NEPC. The Federal Government of Nigeria (FGN) and National Assembly (NASS) support is important to bring the draft legal framework into effect. This research also recommends that beyond having a Sui Generic protection system for Nigerian GIs products, there should be an institutional regulatory and enforcement mechanism for the production, processing, and marketing of Nigerian ginger and shea products. The regulatory authority should prioritise quality, standards, certifications, and labelling requirements to maintain the authenticity and quality of these products.

• *Capacity Building, Training and Awareness*

For the implementation of the recommendation in (i) above, training and awareness programs on the concept of GIs will be important for national lawmakers, government officials and private sector stakeholders. This is so because the study found a huge knowledge gap among stakeholders on the importance of GIs and their protection for preserving Nigeria's cultural heritage, the national economy, development and growth. The importance of investing in training programs for farmers, producers, associations and other stakeholders involved in the ginger and shea value chains will enhance their skills, knowledge, and capacity to produce high-quality products, improve efficiency, and meet domestic and international standards while maintaining the traditional knowledge in the production value chains. Similarly, creating awareness campaigns to educate stakeholders, especially farmers and producers, about the importance of intellectual property rights and the benefits of GI protection will help safeguard the products from counterfeiting and unauthorised use.

- **Strengthen Legal Framework to Combat Deforestation of Shea Trees**

The study shows that deforestation is occurring at an alarming rate, which is detrimental to the environment and climate. It is urgent that the legal framework for addressing the deforestation of shea trees is improved. The study has highlighted the importance of incorporating environmental and climate-resilient considerations into existing regulations. If the deforestation of shea trees is not mitigated, the depletion of these resources will continue, as local communities rely on them for charcoal processing. It is essential to recognise the unique characteristics of shea trees, such as their slow growth and limited adaptability, which require special attention in preservation efforts. The establishment and enforcement of environmentally conscious regulations are crucial to protect both the economic value of shea trees and the overall climate. The study has found that cutting down shea trees without regulation has negative effects on vital ecosystem services, such as reducing carbon in the air, maintaining soil stability, and conserving biodiversity. This can lead to increased carbon emissions and worsen global climate change. To address this environmental problem, it is essential to implement measures that balance the economic demands of local communities with the long-term impact on the environment.

- **Infrastructure development can unlock value for ginger and shea products**

The potential of unique Nigerian ginger and shea as potential GI products has been hindered by the lack of adequate infrastructure in their regions of origin. This deficiency negatively impacts market access for these valuable products. This research has highlighted the exceptional qualities of Nigerian ginger, which boasts a distinct aroma, pungency, and high oil content. In light of these findings, there is a clear call for GI certification to harness the potential of the Nigerian ginger industry, driving value addition and expanding market diversification. Alongside quality enhancement and sustainability efforts, addressing infrastructural gaps becomes a pivotal strategy in transforming the ginger and shea sectors. The study highlights the indispensable role of robust infrastructure in propelling the growth of the ginger and shea industries. In the shea butter and ginger-producing areas, concerted efforts are required to improve and rehabilitate rural access roads. Adequate and sustainable water supply, fostering efficient production practices, is critical in shea butter-producing regions. Moreover, the establishment of processing centres in key production hubs and support for cottage industries within the ginger and shea value chains is essential for adding value to the rural communities.

- **Branding and Marketing**

There is a need for sensitisation of key actors in the shea butter and ginger value chains, especially the primary actors, on issues relating to market access, export, branding, and packaging. To this end, effective and efficient collaboration among private industry players, government agencies, and relevant research institutions is required for the training of the main actors (farmers and producers) in the shea and ginger value chains. Develop a strong branding and marketing strategy for Nigeria's ginger and shea butter. This should highlight the products' unique qualities and geographical origin, positioning them as premium choices in the global market.

- **Cross-Sectoral Collaboration**

According to the research, 72 percent of ginger and 69 percent of shea sampled producers do not belong to any associations or trade unions. This will restrict access to resources and information and have a negative impact on the unity of purpose in achieving a common objective. As a result, the study recommends that the government and other key players in the public and private sectors step up their efforts to organise ginger and shea producers and other value chain actors into organised associations. Promote collaboration between relevant government ministries, private sector stakeholders, and development partners to create a conducive environment for the sustainable growth of the ginger and shea butter value chains, including encouraging the formation and strengthening of farmer cooperatives in the ginger and shea butter sectors. Cooperatives can help small-scale farmers pool resources, access markets collectively, and negotiate better prices for their produce.

- **Market Linkages and Access**

Facilitate market linkages between local producers and international buyers. This could involve organising trade fairs, exhibitions, and business-to-business events to connect producers with potential customers and increase export opportunities. The study also recommends working with relevant agencies to streamline export processes, reduce bureaucratic bottlenecks, facilitate market access, and promote these potential GIs products in international trade fairs and exhibitions. While promoting international trade, also focus on diversifying markets for Nigeria's ginger and shea butter. Explore opportunities in neighbouring African countries under African Continental Free Trade Area (AfCFTA) and emerging markets to reduce dependency on a few traditional markets.

- **Access to Finance and Credit**

Smallholder farmers and SMEs in the ginger and shea sectors require financial support and access to credit to invest in modern technologies, expand production, and enhance competitiveness. The study has identified the lack of incentives as a major hindrance to value addition; hence providing incentives within Nigeria will encourage value-added products. This, in turn, will boost export earnings and create more employment opportunities across the product value chains.

- **Continuous Regulation/Policy Review**

It is recommended that a time frame be in place for regulatory and policy review of Nigeria's ginger and shea products under the GIs sui generic system. This will allow for feedback from stakeholders on product performance, which can be used to adjust policies according to changing market dynamics and emerging challenges. Through this, Nigeria can improve food safety and quality assurance systems, comply with international standards, and boost consumer confidence in its GI products. Additionally, this will open up access to more profitable markets. The study recommends implementing a short, medium, and long-term policy that recognises women's significant role in the ginger and shea value chains. Women should be empowered through training, access to finance, and equal participation in decision-making processes, especially in adding value to unique products. By following these recommendations, Nigeria can enhance the competitiveness and market access of its ginger and shea products, unlocking their full potential as valuable GIs products under the Zero Oil Plan. This, in turn, can contribute to economic diversification, job creation, sustainable development, and increased global recognition of Nigeria's agricultural products.

ENDNOTES

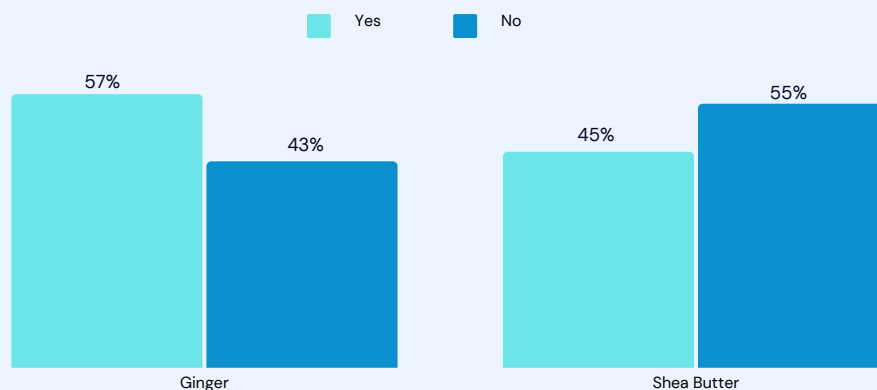
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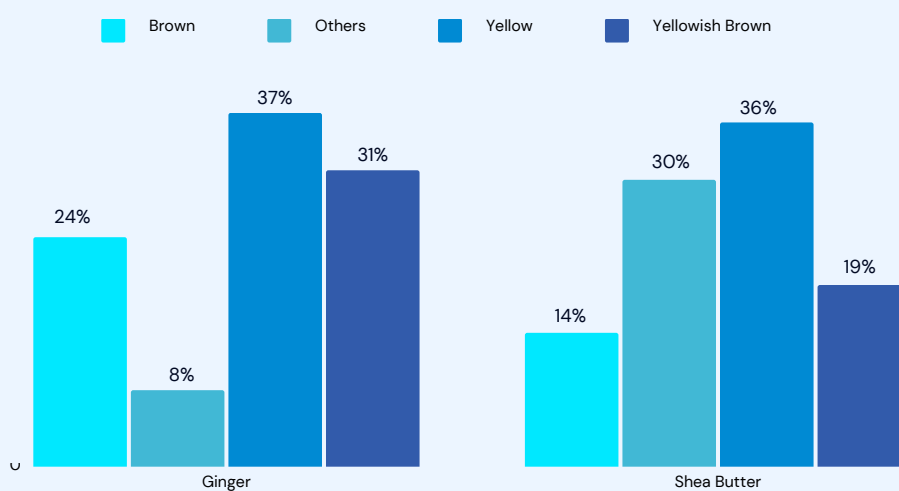
APPENDICES

Do you have employees on your payroll?



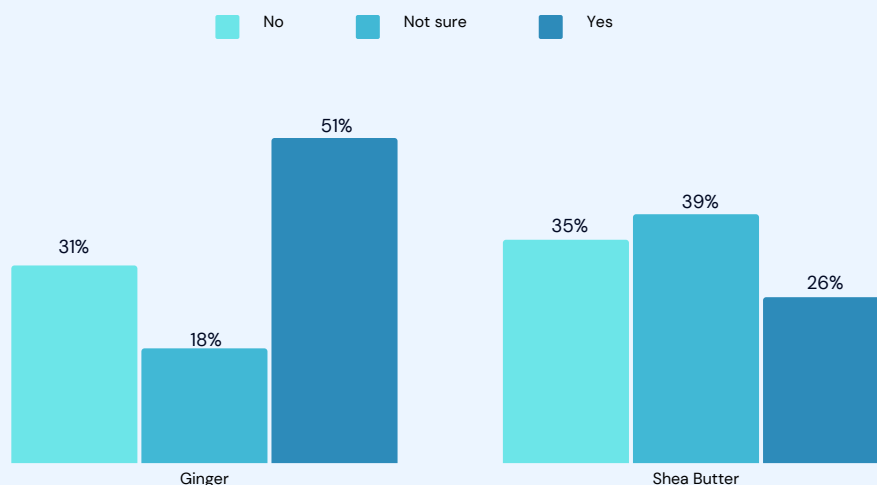
AITCR Ginger & Shea Butter Value Chain, 2022

Which natural color best describe the physical feature of your product



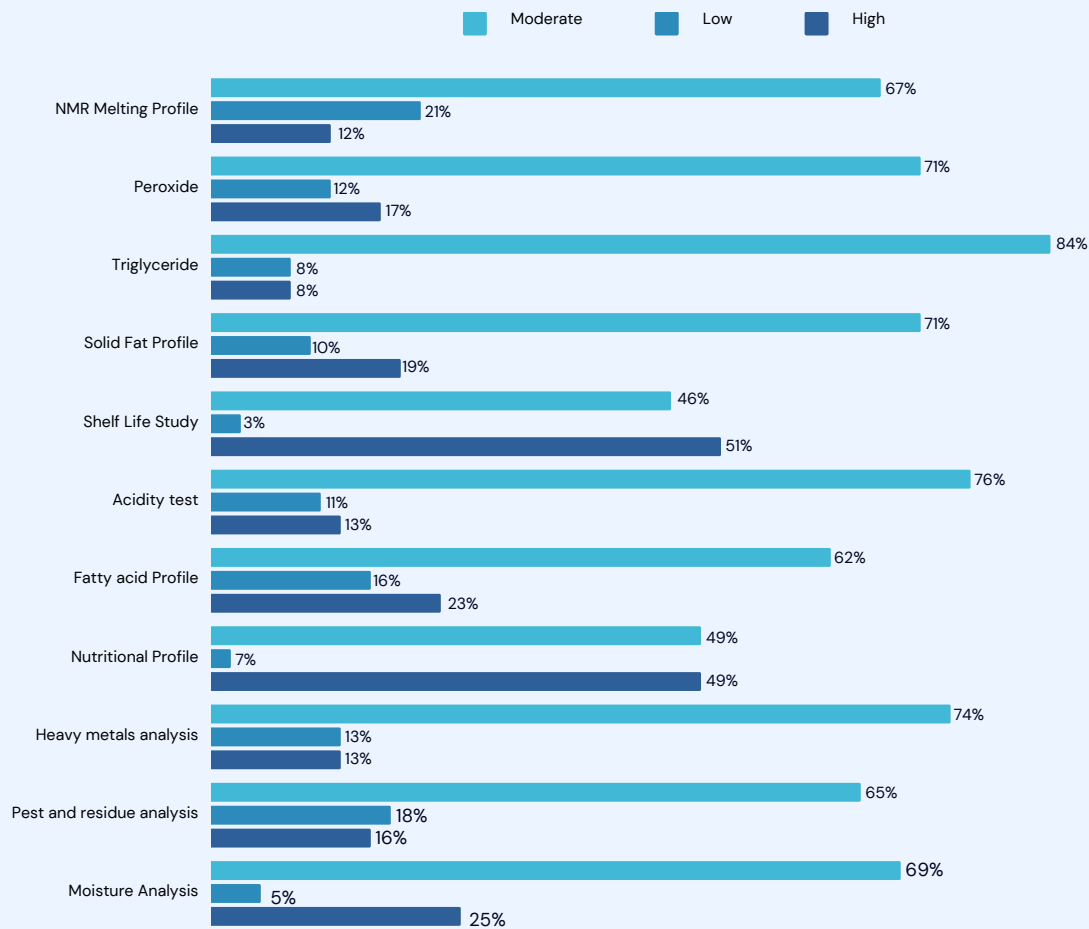
AITCR Ginger & Shea Butter Value Chain, 2022

Is the color of your product different from other types outside of your location?



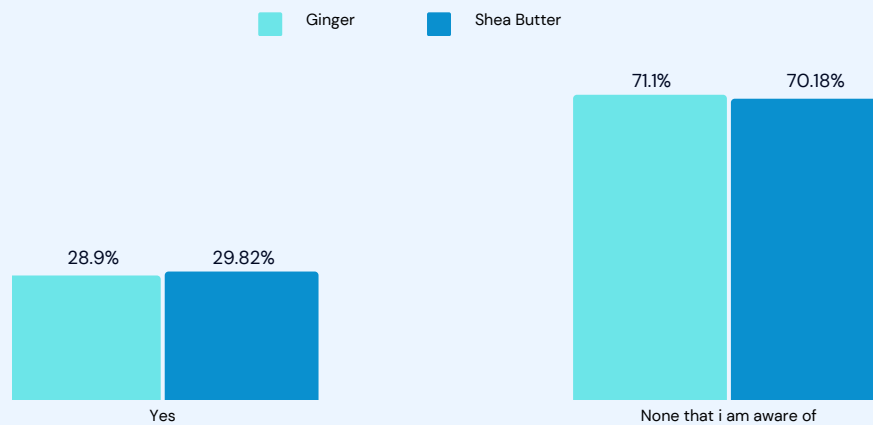
AITCR Ginger & Shea Butter Value Chain, 2022

Please rate the level to which your product meet up with the following global standard



AITCR Ginger & Shea Butter Value Chain, 2022

Is the traditional mode of production unique to your locality?



AITCR Ginger & Shea Butter Value Chain, 2022

List of Ginger Association

S/N	NAME OF GINGER ORGANISATIONS/SOCIETIES/ASSOCIATION
1	Agro Log
2	Agro log cooperative
3	Ankwa Cooperative society
4	Chori Ginger Marketers Association, Chori Branch, Jaba LGA
5	Demshar Cooperative Society Kwoi, Jaba LGA
6	Ginger Marketer/Farmers Association Kwoi, Jaba LGA
7	Ginger Farmers and Marketers Kachia
8	Ginger Farmers Association Bitaro
9	Ginger Farmers Association Kenyi
10	Ginger Farmers Association, Kwoi, Jaba LGA
11	Ginger Growers, Processors, and Marketers Association of Nigeria
12	Hamda Ginger Cooperative Societies, Kwoi, Jaba LGA
13	Ham Ginger Farmers Association Cooperative
14	Ginger Producers Association of Nigeria
15	Gurara Ginger cooperative
16	Ginger Marketers Association Kachia LGA
17	Kachia Ginger Co-operative Society
18	Kachia ginger group farmers and Marketers
19	Kachia Ginger Marketers Association
20	Kachia Ginger Marketers cooperative society limited
21	Kachia Ginger processors and marketers
22	Kachia Ginger Taskforce
23	Kasuwa Mageni ginger marketers cooperative society
24	Kenyi Ginger Farmers Group
25	Kurmi Jatua district business association, Jaba LGA
26	Kwouopa Association, Kwoi, Jaba LGA
27	Maraba market ginger sellers
28	Men Cooperative Societies Kenyi
29	National Ginger Association Of Nigeria
30	Nigerian Ginger Farmers association
31	Nok Cooperative Society, Jaba, Kaduna
32	Nok Ginger Farmers Cooperative
33	SabZuro Ginger Farmers Association, Kwoi, Jaba LGA, Kaduna State
34	Samban Daji Ginger Farmers Cooperative
35	Samban gida Ginger Farmers Association, Jaba
36	Sub Zuro Ginger Farmers Association

37	Ungwan rana district trade farmers cooperative society
38	Ungwan Ate multi purpose cooperative society
39	Yeyock Ginger Farmers Association, Kwoi, Jaba.
40	Youth Cooperative Ginger Association
41	Zango kataf ginger association
42	Zango kataf ginger maketers
43	Zonkwa Ginger Marketers Association

S/N	LIST OF SHEA BUTTER ASSOCIATION
1	CROWN SISTERS SHEA BUTTER ASSOCIATION.
2	Agra ewo kayi association
3	Albarka Association
4	Alheri Kodo Shea butter
5	Alheri Women Cooperative
6	Alheri Women cooperative Kampani Kodo
7	Alubarika shea butter association
8	Ashejere association
9	Assanyin Women farmers cooperatives
10	Association of cosmetics seller kasuwan gwarri
11	Association of cosmetics sellers Minna
12	Association of Shea Agro Niger State chapter
13	Association of Shea butter in Niger State
14	Association of shea butter of Nigeria
15	Association of Shea Millers
16	Beez Association of Nigeria
17	Bida Vegetable Oil Association
18	Bosso Estate Cooperative
19	Bosso Local Government Shea Butter Association
20	Cosmetic formulators industrial cooperative society, national association of shea butter producer's of Nigeria and Shea trade
21	Crown Shea butter sisters
22	Egbe orori
23	Ena Agbaba Wadata
24	Fundgur
25	Global Shea Alliance, Network of National Shea cooperatives and NASPAN

26	Ifedawapo Association
27	Ifedawapo Shea butter association
28	Ifeoluwa group
29	Ifesowapo/Abu Yusuf Association
30	Ifokanbale Association
31	Iwajowa Association
32	Lalagi shearbutter producers
33	Lavun Shear Nuts Association Kutigi (L.S.N.A.K)
34	Memuna Association
35	Mokwa Local Government Shea Association
36	NASPAN, GLOBAL SHEA ALLIANCE
37	National Association of shea butter Association of Nigeria. Niger State coordinator
38	National Association of Shea Butter Farming Association of Nigeria
39	NATIONAL ASSOCIATION OF SHEA PRODUCERS ASSOCIATION OF NIGERIA (NASPAN)
40	National Shea Butter Association of Nigeria
41	Oridola Shea butter processing Association
42	Orilola Shea butter processing Association
43	Pmalatako Cooperative Society
44	Pmatalako Cooperative society
45	Shea Agro Association of Nigeria Niger State chapter
46	Shea butter association Agaie
47	Shea butter association Niger State
48	SHEA FORMULATOR NASPA
49	Suruna Shea Butter Association
50	Talba Shea Butter factory
51	Yegborolo Baba women cooperative

List of Suport Givers to product value chains

S/N	ENTITY/ORGANIZATION PROVIDED THE MOST RECENT SUPPORT TO YOU?
1	Afex
2	Afex Fair Trade Ltd
3	Agro log Cooperative
4	AMTI
5	Appeals, DDI

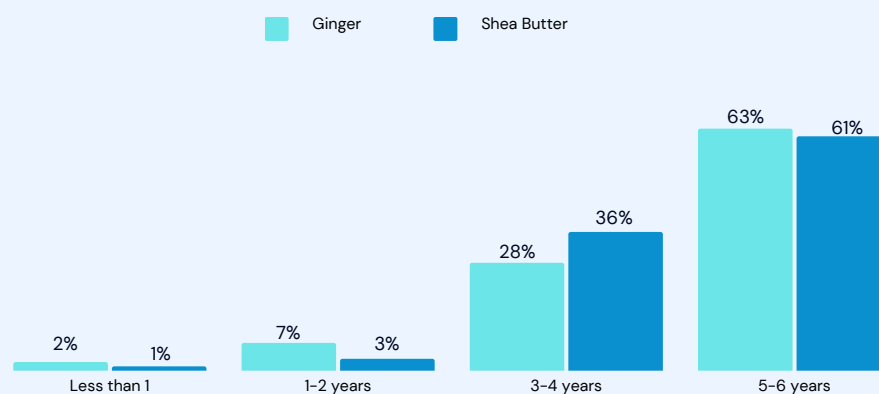
6	ARMTI
7	Association Cooperative
8	Bank of Industry (through NYSC)
9	Cooperative Society
10	Deddu Ginger Cooperative, Agro Log
11	Export Promotion Council
12	Federal government
13	From Individuals in form of loans
14	Grace and Mercy Group(Like LAPO)
15	Individual Support
16	Kachia local government support
17	Kaduna State government
18	Family
19	Niger State government
20	Nigerian Export Promotion Council
21	Nigerian Exports Council
22	Shea Agro
23	United Nations Women
24	Niger State government

List of export destination for Shea butter in Kg

COUNTRIES	SHEA BUTTER VOLUME (KG)	RESPONDENTS
CHINA	400	6%
DUBAI	1050	6%
EGYPT	1300	6%
GHANA	1300	9%
INDIA	50	3%
KENYA	600	6%
MOROCCO	1300	6%
NIGER	600	9%
PARIS	6	3%
RUSSIA	50	3%
SINGAPORE	50	3%
SOUTH AFRICA	1056	9%

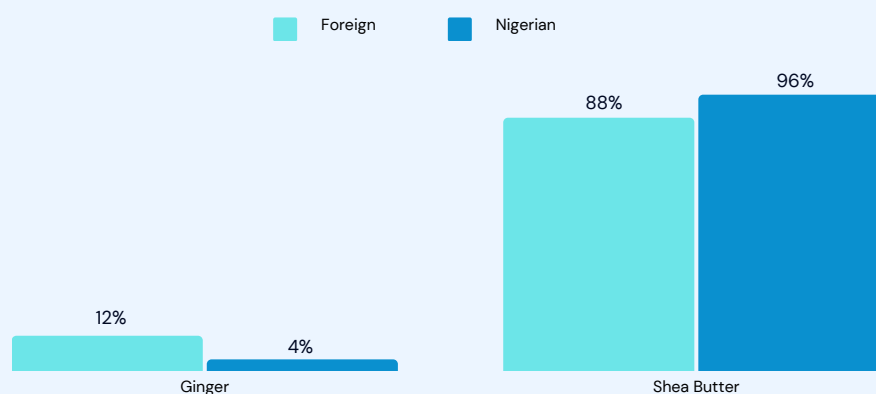
SUDAN	3000	9%
TURKEY	100	3%
UK	3	3%
US	1005	18%
CHINA	400	6%
DUBAI	1050	6%
EGYPT	1300	6%

Do you have employees on your payroll?



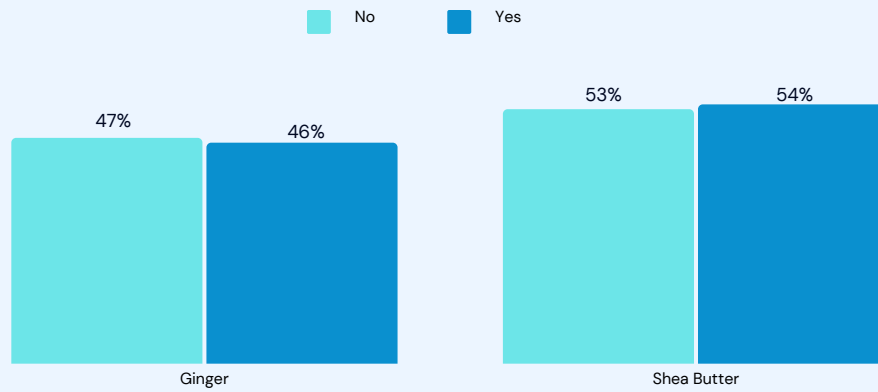
AITCR Ginger & Shea Butter Value Chain, 2022

Is your aggregator firm a Nigerian or foreign entity?



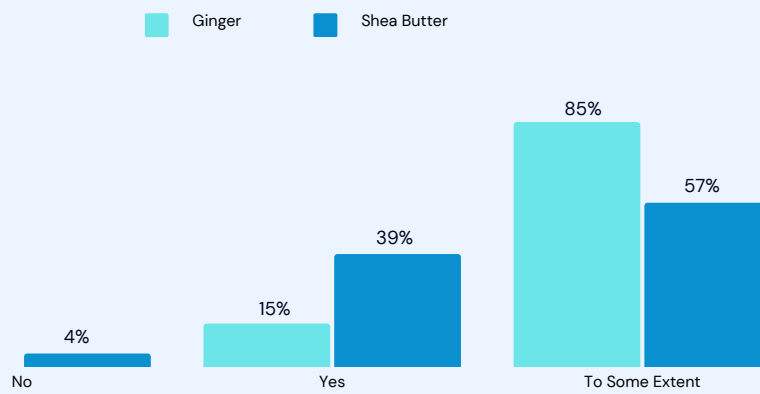
AITCR Ginger & Shea Butter Value Chain, 2022

Do you often require the services of a third party for your logistics?



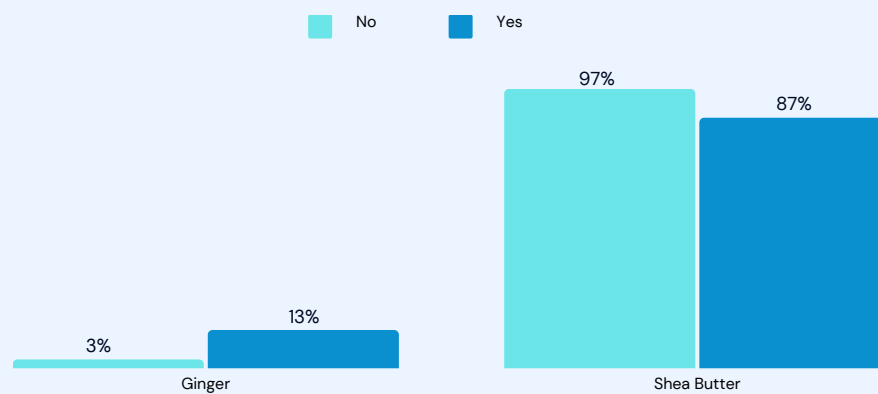
AITCR Ginger & Shea Butter Value Chain, 2022

Do you often require the services of a third party for your logistics?



AITCR Ginger & Shea Butter Value Chain, 2022

Can you say your annual sales has increase overtime?



AITCR Ginger & Shea Butter Value Chain, 2022



EEFP


EXPORT EXPANSION FACILITY PROGRAMME
NIGERIA ECONOMIC SUSTAINABILITY PLAN



NIGERIAN EXPORT PROMOTION COUNCIL

Plot 424, Aguiyi Ironsi Street, Maitama, Abuja, Nigeria

 www.nepc.gov.ng  +2347051621328



 ceo@nepc.gov.ng, enquiry@nepc.gov.ng
helpdesk@nepc.gov.ng



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Soulmate House, Plot 188, Durumi District, Off Oladipo Diya Road,
(The Road to American Int'l School), Durumi Abuja, Nigeria.

 +2349058603907  www.africainternationaltrade.com

 mail@africainternationaltrade.com  @africatradelink

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