1. INTRODUCTION

Understanding access to markets and the institutions of the food sector is a major challenge for pro-poor growth. Pro-poor growth in the food sector will not only raise incomes (for poor producers, poor traders and the poor who operate in related sectors, notably transport), but will also reduce the cost of food for poor consumers. It will thus reduce the vulnerability of the poor in general. This report presents results of a short programme of work on access to different types of market (notably food and transport) and the linkages between markets (food, transport, credit etc.) conducted by 15 researchers across Nigeria’s major regions. The study incorporates syntheses of previous studies with new field research and thus aims to make a significant contribution to building a food marketing policy evidence base across Nigeria.

Background

DFID Nigeria is committed to supporting the food marketing system through a number of programmes in order to ensure growth in commodity and service markets that offer pro-poor opportunities. However a more comprehensive evidence base on which to base these policies is needed.

The lead researchers carried out a scoping study (R8330) during which they identified a number of specific issues related to food markets where there is a severe lack of empirical evidence. DFID Abuja selected three core themes from our list which could feed in directly to supporting their existing programmes. These topics thus form the focus of our current study:

1. Understanding urban food markets: how can such markets best supply the urban poor consumer with good quality food at affordable prices.
2. Understanding transport markets: efficiency of transport markets and means to improved market access.
3. Understanding the linkages between different markets – transport markets, credit markets, labour markets, food markets - and making linkages in these markets across the formal and informal sectors.¹

¹ A study of the role of inter-ethnic trade and market interaction in conflict initiation and development and in conflict resolution has been undertaken as a separate project. Other topics which could form the focus for further research programmes include: a) Understanding credit markets: credit availability among different producer and food trader types and implications of middleman credit supply, b) Understanding how to support and facilitate entrepreneurship that contributes to local economies and improves urban food supply, c) Understanding the role of markets and trade in spread of STDs (notably HIV/AIDS) and the potential role of traders, transporters and market institutions in supporting HIV/AIDS programmes; d) Understanding current informal market information systems and how market; e) Understanding individual market chains/networks, notably the perishable vegetable chain (whose smooth working is essential to the health of urban populations); f) Understanding the informal regulatory climate which governs markets, market access and trade: vigilantes, trader and transport associations/unions etc. - and gauging the potential for improvement; g) Understanding the role of private sector associations and organisations in lobbying for policy change and greater accountability.
Understanding markets and making them work for the poor in Nigeria
To make markets work for the poor requires greater understanding of existing market systems. The research problem addressed in this current project is the lack of specific knowledge and understanding of formal and informal market institutions in Nigeria and their impact on urban food supply systems. It explores the systems which govern the marketing opportunities for producers and the mechanisms of marketing food in urban areas.

There is a wide range of highly complex formal and informal institutions that shape Africa's food marketing systems: different types of association and self imposed rules, in addition to national legal systems that affect how trade is done. Very little is known about how these formal and informal regulatory systems currently operate\(^2\). For example, the positive contribution of both urban-based and rural-based traders in providing an essential service to urban consumers has not been adequately analysed. We need this information if we are to improve access by producers to suitable markets and thus enhance urban food supplies, and also secure income and livelihoods.

Project outputs
Through our earlier literature review and Jos pilot (from R8330), combined with synthesis of the 15 centre-specific case studies of food marketing issues and related transport markets, and our analysis of market linkages, we have been able to explore the impact of market institutions on pro-poor growth in Nigeria. Benefits of the approach taken in this study include the following:

- The studies provide specific empirical information for different regions of Nigeria for the same period on specified marketing issues.
- Each case study provides basic information on markets for circulation to local stakeholders (state government, NGOs, local universities) and thus can help inform state development programmes and regional planning strategies.
- Identification of good practice and understanding of the potentialities and constraints which may be imposed by specific local contexts. Dissemination of material on good practice and its potential for adoption to federal ministries, government agencies, donors, NGOs and other stakeholders should, where practicable, promote its extension across the country.
- Our analysis of linkages between different markets (transport, credit, labour, food) in different areas of the country aims to contribute to a broader understanding of how, why and to what extent different markets interlink or fail to interlink on the ground and the role of both local and national context in shaping market interlinkages. An understanding of the nature and scale of linkage is an essential precursor to interventions by

\(^2\) This argument is well supported by our project R8330 Literature Review: Gina Porter, Fergus Lyon, Deborah Potts and Tanya Bowyer-Bower, May 2004: available on the current project website.
policy makers, since inappropriate interventions in one sector of one market can have unforeseen and wide ranging repercussions across markets.

- The training programme undertaken through our two workshops has contributed not only to promoting a focus on understanding market issues in Nigeria but also a network of researchers focussed on food supply issues which can be drawn on for future studies and policy advice where and as these are required.

- Conclusions of the work should contribute to wider policy agendas (within DFID, other donors, national governments and NGOs) for pro-poor growth in connection to rural livelihoods and food security. Our preliminary consultations in Nigeria, prior to the start of this project, indicated an urgent identified need for input on these topics into ongoing programmes within DFID (ProPCom, Drivers of Change/conflict resolution, development of Ekiti access project, ProFin S); the World Bank (Fadama II, RTTP); IFDC (Market information) and the ministries (notably transport – RTTP-related). There is also potential for this evidence-based research to support other current and future donor programmes, other current and future government programmes, current and future NGO, CBO/ civil society projects and programmes and private sector actors and institutions, whenever knowledge of transport, labour, credit and food markets is required.

Review of key themes
A conceptual framework for this project was developed from a previous study (R8330) which reviewed the literature of market institutions and urban food supply for sub-Saharan Africa. It suggested that there is a wide range of organisations and institutions that are used to enforce regulations and create new opportunities. These can range from illegally based organisations through to formal and less formal organisations and relationships, and even norms and customs in a particular cultural context. The table below sets out a simplified framework for classifying these types of organisation (while recognising that formal and informal categories may overlap)

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<th>Formal</th>
<th>Informal</th>
<th>Cultural Norms</th>
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<td>National Government</td>
<td>Traditional authorities</td>
<td>Customs and trading practice</td>
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<tr>
<td>Local Government</td>
<td>Trade Associations</td>
<td>Reciprocity</td>
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<td>Parastatals</td>
<td>Community groups/CBOs</td>
<td>‘Rules of the game’</td>
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<td>NGOs</td>
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<td>Unions</td>
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<td>Large-scale private sector firms</td>
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<td>Co-operatives</td>
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The literature review illustrated that, despite the presence of much detailed, if slightly outdated, empirical information on Nigerian rural trade (much of which was conducted prior to the 1990s), there is clearly a shortage of specific knowledge and understanding of formal and informal market institutions and their impact on urban food systems today.

We list below some of the broad but key questions which emerged from our literature review and which have been pursued through the case study research in the current project.

**Key questions on commodity chains/networks**
- How do individual commodity chains work through from rural, peri-urban and urban producers to urban and rural consumers?
- What are the implications for the livelihoods of the urban and rural poor?

**Key questions on trader roles**
- What roles are private traders currently playing in the urban food supply system? What institutions and types of regulation shape their activities?
- How are current trader patterns gendered in Nigeria? To what extent does this gendering impact on formal and informal institutions? What are the implications for gendered livelihoods?
- How does ethnicity shape current marketing patterns? Can excessive ethno-domination be mediated/regulated by formal/informal institutions?

**Key questions on control of market space**
- To what extent and in what ways is access to market space controlled in Nigerian markets?
- What are the consequences for individual trader and producer-trader types?
- Who is currently excluded and with what consequences?
- To what extent does central and local government currently regulate access to market space? With what consequences?

**Key questions on market information**
- What are the principal channels of information currently used by traders of different types?
- How important are personal networks for information gathering?
- Are there specific information brokers? If so, how do they operate?
- How much use is made of government information outlets?
- What are trader perceptions of government information channels?
- If these were improved would they be used more? If so, how could they be improved?
- To what extent are mobile telephones used along different components of the marketing chain? What are the barriers? What is the future potential?
Key questions on credit provision
- What credit provision is available to key trader types along the urban food supply chain?
- What proportion at each level comes from formal as opposed to informal sources?
- What interest rates are applied?
- To what extent have microfinance schemes assisted in credit provision among the various trader groups?
- Can credit provision be improved? How?

Key transport questions
- How is the existing transport system organised to bring food supplies to urban markets?
- Who else may be able to provide transport but is not allowed access at present?
- What are the regulations and institutions (formal and informal) regulating access to fuel?
- What are the regulations and institutions (formal and informal) regulating access to routes and lorry parks?

Key questions on consumption
- What are the buying patterns of different types of consumers?
- Where do poorer consumers buy their food?
- What types of food do poorer consumers buy?
- What are the restrictions on poorer consumers in accessing lower-priced or better quality food?
- What progress have supermarket operations made in Nigeria and what is likely to be their impact on consumers over the next decade?

Key questions on food safety regulation:
- Which government regulations in place to protect consumers currently have any real impact on food safety?
- Which regulations in place are enforced? Which are not enforced? Why not?
- How can enforcement of regulations be improved? (including trader and government perceptions)

Key questions on consumer associations:
- What consumer groups are operating in Nigeria?
- How do they operate and what do they do?
- What political representation is there for poorer consumers?
- Is there potential to increase their voice?

Key questions on central and local government roles:
• What is the current pattern and level of central and local government involvement in urban food supply, marketing regulation and facilitation?
  • Is it sustainable?
  • Is there potential to increase their involvement? In which areas?
  • Is there need to reduce their involvement (i.e. reduce excessive regulation)?

**Key questions around legislation:**
• What are the laws and regulations
• How do they affect (positively or negatively) different groups (in particular urban and rural poor)
• How are these enforced (examples if known)?
• What restrictions are there on enforcing this law?
• What compliance costs?
• How do people get around it?

**Key questions re standardisation of weights and measures:**
• What types of weights/measurement are currently prevalent among different trader groups and different markets?
• What government legislation re weights and measurement is currently in place?
• To what extent is it enforced and with what consequences?
• How do different types of traders perceive the weights/measurement issue? How do regulators perceive it?

**Key questions on trader associations:**
• To what extent are trader associations active in different markets and commodities?
  • What is their role?
  • Do they improve the access of the urban and rural poor to safe, cheap food? If not, why not?
  • To what extent do they include or exclude informal producers?
  • To what extent could they be improved to provide a better service to producers, traders and consumers?

**Key questions on pricing:**
• To what extent does price setting among trader groups occur in markets?
• What are the consequences for individual producer and trader types and for rural and urban consumers?

**Key questions on youth vigilante groups:**
• How prevalent are vigilante youth groups in the study locations?
• What do they do?
• In what ways and to what extent do they improve or hinder food supply to the poor?
• In what ways and to what extent do their activities impinge on producers, specific trader groups and other stakeholders?

**Key questions on NGO involvement:**
• What is the current pattern and level of NGO involvement?
• Is it sustainable in the long-term without large-scale subsidy?
• Is there potential to improve NGO/Local government collaboration?

**Key questions on the role of traditional authorities:**
• What is the current pattern and level of involvement of traditional authorities in marketing regulation and facilitation in the case study locations?
• Is it sustainable?
• Is there potential to increase their involvement? In which areas?

**Key questions on alternatives to traditional intermediaries/ forms of supply to urban markets:**
• To what extent do the alternatives to traditional intermediaries (contract farming, coops, etc.) play a role in urban food supply in case study locations?
• In particular, what progress have supermarket operations made in Nigeria and what is likely to be there impact on producers, conventional traders and procurement patterns over the next decade?
• What are local attitudes to these various institutions?
• Is there a potentially larger role for any of these alternatives in rural urban food supply (given that the volume of food items the marketing system will need to handle over the next 20 years will be substantially larger - possibly double - current volumes)?

The Nigerian policy environment towards food marketing

Tension and mistrust between the public and private sector in the produce marketing field has long been a characteristic feature in Nigeria. Nonetheless it is important to examine ways in which the public sector can support private initiative, while bearing in mind the historical context of frequent antagonisms between the two. Food insecurity in Nigerian cities is relatively invisible to policy makers and is still scarcely recognised in contemporary political debate. This is particularly disturbing since urban poverty will most probably become the dominant source of food insecurity in the 21st Century. While democratisation and decentralisation, in theory, strengthen local and municipal governments, this places increased demands on their already strained capacities. They are commonly unable to cope adequately because weak capacity and limited financial resources are characteristic of conditions at this level.

In terms of central and state government, policymakers have tended to focus less on urban food insecurity than on food insecurity in rural areas, where it is
typically a more seasonal and community-wide phenomenon. There has been little interest in produce trading systems. With regard to transport markets, most intervention is limited to infrastructure such as road building.

In terms of Local Government, City and Local Authorities have a range of potential responsibilities that are associated with urban food security and food marketing. However, as Ellis and Sumberg (1998) point out, it is important to be cautious about the capabilities and constraints faced by municipal and government authorities, “and not to advocate measures that are unenforceable, unsustainable or susceptible to capture by stronger social groups at the expense of the weak” (p.220). The major constraints on local government include ill-defined constitutional powers, lack of staff capacity to design and implement programmes, lack of financial resources, central/state government influence/interference, corruption and a lack of dialogue with the private sector. The fact that market taxation is commonly their main source of revenue, given the failure of other forms of taxation, is highly significant. They collect levies but fail to supply electricity, water or sanitation: this is a cause of substantial argument with traders and trader associations. Many of the public health laws, by-laws and ordinances are out of date and irrelevant to contemporary local food conditions. On the producer side, there seems to be poor representation and little ability to lobby local government among small-scale farmers.

In Nigeria, producers, consumers and micro enterprise traders have a lack of trust in formal legal systems. The problem of enforcement and its entanglement with rent seeking practices is widespread. Successful use of legislation requires the ability to enforce compliance and transparency of the process of enforcement. Regulation of profit making activities can create substantial opportunities for corruption.

**Background and project framework**

The researchers leading this study carried out a scoping study of food supply issues in Nigeria (R8330) in January 2004. This involved a literature review of market institutions and urban food supply in sub-Saharan Africa, field testing in one location with collaborators from the University of Jos regarding the relevance of issues identified through the literature review, individual consultations with key federal government staff, NGOs, DFID and other donors and academics, and a seminar/stakeholder meeting in Abuja. This preliminary work led to the identification of a considerable number of specific issues related to food markets where there is a severe lack of empirical evidence on which policy makers and those advising them in Nigeria can base their decisions.

The Jos study suggested that marketing bottlenecks are commonly location and commodity specific; that transport bottlenecks are pervasive; that commission

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agents will probably continue to play an essential role in marketing until/unless alternative means of providing timely credit and inputs are available; that market interactions can both create and resolve conflict; that governance issues (insecurity, corruption, rent seeking, etc.) are a pervasive theme and encompass misdemeanours in both private and public sectors; and that poor urban and rural consumers have little voice in shaping and regulating the market environment. We needed further evidence to either confirm or refute these very preliminary perspectives on Nigeria’s urban food marketing system, given that they drew on one small case study and focused on just one commodity.

**Links to PrOpCom and Drivers of Change**
This project owes its existence, in part, to a peer review of four state marketing studies which we were asked to prepare for DFID Abuja. That peer review in turn, became one of two ToR briefing papers for the PrOpcom project. We were subsequently asked by DFID Abuja to prepare this study of market institutions as a preliminary research resource on which PrOpCom could draw. With DFID approval, the seven individual commodity reports have been forwarded to PrOpCom, which is only now embarking on its main programme of work.

Drivers of Change provided an important political economy background resource and specific material on youth vigilantism, religious and ethnic context, anti-corruption, etc. The interim reports have helped inform the approach taken in this study. The complex mix of coercion with consensus, flexibility and responsiveness identified as key features of Nigeria’s structural environment in the Drivers of Change studies are mirrored in many of the specific conclusions reached here. The gatekeeper organisations and interpersonal relations of trust between market actors that underpin market operations clearly resonate with the emphasis placed on gatekeeper organisations and agents (and their limitations) observed in the Drivers of Change report. In both Drivers for Change and our own marketing study, the ultimate key to improved conditions is identified as transformation of the institutional environment in which individuals and gatekeeper organisations must operate.

**Developing the networked research approach**
Our current project design has drawn directly on the approach taken in a highly successful DFID/World Bank/SDA-funded transport project across Africa and Asia, Balancing the Load, in which one of the authors of this report was involved⁴. The networked approach can enable the delivery of effective results in a short time period over a wide geographical area. It provides a highly cost-effective means of recruiting, training and employing a committed group of researchers, some of whom may have had little previous research experience but are keen (and judged able) to learn.

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We started with requests for expressions of interest to specific academics and a few NGO and government staff resident in different locations across Nigeria. We aimed to recruit about 12 researchers, with 2 working in each of 6 regions. Selection of participants was based on their ability to write clearly and their past experience. Each potential participant was required to sign up to the following agreement: (1) participation in a one-week project preparation/training residential workshop, where they would be helped to design an individual small project for execution in their own work or home location, (2) a short mid-project progress report on their small research study, (3) a second one-week workshop where they would present their research results, receive comments from all project participants, be advised if they needed to collect additional material, and be assisted in the preparation of a final report, (4) delivery of their case study report no later than one month following the second workshop.

Our time frame was very short because DFID Abuja wanted results of the studies as quickly as possible. The first project workshop was held in December 2004\(^5\), the review workshop in March 2005 and the final reports from the Nigerian researchers were accepted in May 2005. We contracted 15 researchers to provide studies (12 new researcher studies and three studies in the Jos region \(^6\)to build on our earlier pilot). All of the 15 researchers we contracted have produced reports.

**Using a networked research approach to address our three core themes**

Obtaining sufficient material to understand Nigeria’s transport markets, urban food markets and the linkages between markets, all within a 10 month period, with a very small budget, has been quite a challenge. The networked approach has enabled us to achieve considerable regional coverage, but clearly we could not expect our collaborators to cover all themes and all commodities in their region. Instead, we asked each researcher to focus on one commodity in which they had experience/knowledge and to focus on one or two of the key issues identified by our literature review and Jos pilot (see above), within a commodity chain/network framework and with particular reference to formal and informal institutions. The key issues identified through the literature review are central to understanding our first two core themes: understanding transport markets and understanding urban food markets. For each broad commodity type, in each regional context, we thus tried to achieve some coverage across these diverse but interconnected issues. The project leaders have then synthesised information from the individual case study material to identify broad patterns and trends.

\(^5\) It was delayed by a threatened general strike.

\(^6\) The Jos University collaborators (Professor Adepetu, Professor Olaniyan and Mr Daloeng) were to have organised the two workshops in Jos, but due to the conflict in Jos (and associated concerns about insurance cover), Durham University required us to hold the workshops in Abuja. We therefore asked our Jos collaborators to develop their work from the pilot studies because they could not organise the workshops. The workshops were organised directly from UK instead.
Researcher background, case study topics and regional coverage

All our Nigerian researchers came from academic institutions (universities and research institutions), because none of the NGO or government staff we approached expressed an interest in participating. Their academic backgrounds are principally geography, food technology or agricultural economics, though one (Dr Adamu) is a sociologist. These varied disciplinary perspectives bore positive fruit in our workshop discussions, helping shape both the field research and subsequent analysis.

In selecting our researchers, we had to balance our desire for adequate regional coverage with researcher interest in the project and a very modest budget which only provided for researchers to undertake the study from their home/work base\(^7\). Consequently, our regional coverage was better in some areas than others: two studies were based in north-western Nigeria (Sokoto), one in north-eastern Nigeria (Maiduguri), four in Plateau State (three in the Jos region, one off the Plateau in Jengre), one in north central Nigeria (Zaria region), two studies in the south west (one in the Ibadan region, one in Abeokuta), three studies in south-south and south-east Nigeria (all comparative two-city studies in Enugu and Benin) and one in Delta State (Warri).

Each researcher’s commodity focus and specific topic of research was not confirmed until after considerable discussion at the first workshop (held in Abuja in December 2004). Although each participant came to the workshop with provisional ideas about their own topic theme and commodity, the final selection was based on a balance between their previous work, knowledge and interests, the limited funds and time available for the project, and the potential for linkages between studies. Generally, we asked researchers to build on their own previous work in their case study region. The commodities we finally selected were livestock, maize, cowpea, vegetables, fufu, garri, and fish, thus giving a reasonable diversity of food types and the potential to make some useful links and comparisons.

Livestock is the focus for three researchers: two working in the north-east rearing region, one in the south-west consuming region: this allows us to follow the livestock chain from the collecting markets through to the city butchers in Ibadan. Trader networks, security, transport institutions and insurance and are key themes linking these studies. We also have one study focussing on fish. We did not anticipate including fish in our project, but Professor Ikporukpo demonstrated to all the collaborators that this study could provide important perspectives on ethnic trade networks, transport and market access. Both livestock and fish play an important dietary role, though in Nigeria the cost of animal protein, in particular, limits its accessibility to the poor. However, a considerable number of

\(^7\) Each researcher received an honorarium of £1000 (paid in three instalments over the course of the project): this had to cover all their travel and other expenses pertaining to the research. The researchers obtained no other funds from the project, apart from travel to the two workshops.
very poor people obtain their livelihood through their participation in herding, fishing and porterage of these commodities.

Maize features in two studies from northern central Nigeria: Jengre, in Plateau state, and Giwa in Kaduna State. Both are major grain trading centres located within important maize producing areas. The studies cover a wide range of issues from measurement and credit to the role of the diverse trading agents and transport and allow us to draw comparisons between arrangements in the two centres.

We have two cowpea studies, one based at the centre of a major producing region (Maiduguri, in Borno) and one in a distribution and consumption centre (Abeokuta, serving consumers in south western Nigeria). Cowpea is a very important source of cheap protein for both the urban and rural poor in Nigeria. The Maiduguri study focuses particularly on measurement and access to credit, the Abeokuta study on measurement: both consider the role of trader associations.

Gari was the commodity for three studies, all of which examined and compared marketing in Benin and Enugu. Gari, manufactured from cassava, plays a particularly important role in southern Nigeria as an urban convenience food. The reports consider different aspects of the gari chain and the urban market institutions which regulate the trade, including market information, credit provision, transport institutions, control of market space, security, trader associations, food safety and measurement.

Vegetables are also included within the project, although they had also been the focus for our earlier pilot on the Jos Plateau. The three studies extend the information gathered in January 2004, by providing further detail regarding producer-trader relations, market security and retail trade to Jos urban consumers.

**Evaluating the networked approach adopted**
The review of coverage above indicates that the networked approach allowed us to achieve:

- Timely review of a complex topic across diverse regions of a large country. While our regional coverage was not complete, and we have better coverage for some regions than others, there is no other way that we could have achieved similar coverage over the same short period. If we had used one research team for the whole country, this would have had to be supported by local staff in each location, because of the diversity of local languages prevalent in market contexts.
- Cost effectiveness. Because each researcher was working in their home location, we did not have to pay extensive travel costs. The researchers incorporated the studies into their everyday work.
- Creation and capacity building of a network of researchers.
On the negative side, the fact that our team had diverse disciplinary backgrounds and interests meant that some studies are stronger on economic issues, others on food quality etc. However, this was to some extent compensated by the fact that researchers advised and consulted with one another during the planning workshop.

We were able to achieve adequate triangulation through the workshops and email exchanges between participant researchers, since although each researcher had a particular expertise in his/her own selected commodity and in-depth knowledge of the research location, all researchers had broad knowledge of other commodities and substantial cross-regional research experience in marketing issues. We were able to achieve further cross-checking through reference to earlier literature (fully researched for the literature review) and through the presentations made at the stakeholder meeting in Abuja to a wider audience of academics, practitioners and policy makers. Finally, Professor Ayodele Ariyo (Department of Geography, Ahmadu Bello University), an internationally recognised food marketing specialist, who was unable to participate in the study due to prior commitments reviewed the reports, thus providing a final check.

Overall, we are extremely pleased with the studies produced through the approach. While some may be considered stronger than others, they have allowed us to review a complex topic over a vast country, in an extremely short period of time, and at remarkably low cost. In the longer term there are further potential advantages: since the marketing network has now been established, it has allowed academics from diverse disciplinary backgrounds to interact and, consequently in-country capacity has been enhanced. Hopefully, this will lead to further collaborative work. Our Nigerian colleagues have also expressed their satisfaction with the results of this networked approach which has spread the opportunity to make a contribution rather more widely than is commonly the case in overseas-funded projects of this kind.

Organisation of the report
Ensuing sections of this report focus on major commodity groups. We have synthesised findings from individual papers to provide composite reviews and cut out overlapping material where there would be excessive repetition across studies. However, the individual reports can be consulted on the project website: www.dur.ac.uk/nigerian.marketing. We conclude the report with our synthesis chapter, including a range of policy guidelines for Nigeria-based and other policy makers.