



# HORTICULTURAL SECTOR RESEARCH REPORT NIGERIA

A Comprehensive Mapping of Actors, Institutions and  
Labour market dynamics in Nigeria Horticultural sector

## **ABSTRACT**

**Drawing from a wide-range of qualitative data sources, this report presents a detailed mapping and assessment of the political economy of trade unionization and the horticulture value chains in Nigeria**

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# LIST OF ACRONYMS

|             |   |
|-------------|---|
| APC         | All Progressives Congress                                       |
| APPEALS     | Agro-Processing Productivity Enhancement and Livelihood Support |
| BRC         | Business Resource Centre  |
| CBN         | Central Bank of Nigeria   |
| CB          | Collective bargaining   |
| CBA         | Collective Bargaining Agreements                                |
| COLEACP     | Committee Linking Entrepreneurship Agriculture Development      |
| EKN         | Embassy of the Kingdom of the Netherlands                       |
| FGD         | Focus Group Discussions   |
| FOBTOB      | Food, Beverage, and Tobacco Senior Staff Association            |
| GDP         | Gross Domestic Product  |
| GLOBALG.A.P | Global Partnership For Good Agricultural Practice               |
| HDI         | Human Development Index   |
| HACCP       | Hazard Analysis and Critical Control Points                     |
| ICT         | Information and Communication Technologies                      |
| IFDC        | International Fertilizer Development Centre                     |
| IFAD        | International Fund for Agricultural Development                 |
| ILO         | International Labor Organization                                |
| MT          | Million Tonnes  |
| NABC        | Netherlands-African Business Council                            |
| NAP         | National Action Plan  |
| NASC        | National Agricultural Seed Council                              |
| NAPTIP      | National Agency for the Prohibition of Trafficking in Persons   |
| NGN         | Nigerian Naira  |
| NICN        | National Industrial Court of Nigeria                            |
| NIHORT      | National Horticultural Research Institute                       |
| NLC         | Nigeria Labor Congress  |
| NNSP        | Nigeria-Netherlands Seed Partnership                            |
| NUAAE       | Nigeria Union of Agriculture and Allied Employees               |
| NWGBHR      | National Working Group on Business and Human Rights             |
| OSHE        | Occupational Safety, Health and Environment                     |
| PPE         | Personal Protective Equipment                                   |
| PMO         | Project management office                                       |
| PVC         | Polyvinyl chloride  |
| S4C         | Seeds for Change  |
| TUA         | Trade Unions Act  |
| UNGPs       | United Nations Guiding Principles                               |
| UK          | United Kingdom  |
| USA         | United States of America  |
| USD         | United States Dollars   |
| WUR         | Wageningen University & Research                                |

# CHAPTER 1: GEOGRAPHICAL AND DEMOGRAPHIC INFORMATION OF NIGERIA

## GEOGRAPHICAL AND DEMOGRAPHIC INFORMATION

Nigeria is a West African country situated between the Sahel to the north and the Gulf of Guinea to the south in the Atlantic Ocean. It borders Niger to the north, Chad to the northeast, Cameroon to the east, and Benin to the west, with a total landmass of approximately 923,768 square kilometers (356,669 square miles).

Nigeria ranks among the top oil-exporting countries globally, contributing significantly to its economy and development. The oil and gas sector accounts for 86% of total export revenues<sup>1</sup>. Agriculture is also a significant sector of the economy, contributing approximately 24% to the country's gross domestic product (GDP)<sup>2</sup> and food security.

Nigeria remains a multi-ethnic and culturally diverse federation of 36 autonomous states and the Federal Capital Territory (FCT)<sup>3</sup>. With a population estimated at 218 million as of 2022<sup>4</sup>, Nigeria is the most populous country in Africa. About 70% of the population is under 30 years, and 42% are under the age of 15.<sup>5</sup> Thirty-five percent of the total workforce of the country is employed in the agriculture sector<sup>6</sup> (including an estimated 10 million Nigerians directly and indirectly) producing horticulture products such as tomatoes, onions, chillis, mangoes, oranges among others<sup>7</sup> cultivated at a subsistence level, using small plots and depending on seasonal rainfall.

### 1.1. POLITICAL AND GOVERNANCE INDICATORS IN NIGERIA

Nigeria stands out as a nation with a complex democratic landscape, spanning several decades, marked by multiple transitions of power through elections. There has been one power transition from the ruling to the opposition party in 2015. This transition of power



#### KEY FACTS

POPULATION (2022 estimate): 218,541,212

AREA (UN 2006): 356,669 square miles

CAPITAL: Abuja

CURRENCY: Nigerian Naira

between different political parties demonstrated a commitment to democratic principles to some extent.

Currently, the ruling All Progressives Congress (APC), led by President Bola Ahmed Tinubu, which controls the executive arm of government and holds majority seats at both the Senate and House of Representatives in parliament, and the majority of the States, partly dominate the political landscape.<sup>8</sup>

Nigeria's democratic system relies on key pillars such as the federal government and the state governments, the National Assembly and state assemblies, an independent judiciary, a vibrant civil society, and various state institutions. These components play crucial roles in upholding the rule of law, safeguarding human rights, and maintaining democratic stability.

<sup>1</sup> (Organization of the Petroleum Exporting Countries (OPEC), 2022)

<sup>2</sup> (NBS, 2020)

<sup>3</sup> <https://www.worldbank.org/en/country/nigeria/overview#:~:text=Economic%20overview&text=Weakened%20economic%20fundamentals%20led%20the,millions%20of%20Nigerians%20in%20poverty.>

<sup>4</sup> <https://data.worldbank.org/country/nigeria>

<sup>5</sup> <https://theconversation.com/nigerias-large-youthful-population-could-be-an-asset-or-a-burden-186574>

<sup>6</sup> (World Bank, 2020)

<sup>7</sup> FGD with FMARD

<sup>8</sup> <https://www.worldbank.org/en/country/nigeria/overview#:~:text=Economic%20overview&text=Weakened%20economic%20fundamentals%20led%20the,millions%20of%20Nigerians%20in%20poverty.>

However, it is essential to acknowledge that Nigeria faces substantial democratic and governance challenges. In recent years, there has been a noticeable deterioration in governance indicators, particularly in terms of overall government effectiveness, control of corruption, the quality of regulatory institutions, and the protection of human rights. Observers have criticized Nigeria's human rights record, with implications for the respect of human and environmental rights by businesses, including those in the horticulture sector.<sup>9</sup> The local government level suffers from incompetence, lack of funds, and legitimacy. By Tensions and violence before, during, and after general elections often mar the country's political landscape, posing a significant threat to peace and stability. Furthermore, there are concerns that Nigeria's democratic stability, coupled with external factors that are largely outside the country's influence, such as the volatile international energy market, has not fully addressed the pressing socioeconomic and governance challenges, with implications for trust in the policies of the state.<sup>10</sup> Importantly, the state's monopoly on the use of force is still limited. The ongoing and unabated Islamist insurgency in the northeast, increased sectarian crises and organized crime in central Nigeria and the northwest, ongoing piracy along the coast, well-organized insecurity such as banditry, kidnappings, and killings in parts of the country, and violence in the Niger Delta and especially in the northwest region constitutes other major challenges. These concerns about insecurity in various parts of the country have implications for a favorable environment for doing business, especially in the transportation of horticulture products.

## 1.2. ECONOMIC AND SOCIAL INDICATORS IN NIGERIA

In 2014, Nigeria changed its economic analysis to account for fast-growing contributors to its GDP, such as telecommunications, banking, and its film industry.<sup>11</sup> In 2019, Nigeria experienced a real GDP growth rate of approximately 2.2%. The COVID-19 pandemic impacted Nigeria's economic growth, resulting in a slowdown in 2020. The projection of growth for the economy is by

an average of 2.9% per year between 2023 and 2025, only slightly above the estimated population growth rate of 2.4%.<sup>12</sup>

In 2020, the COVID-19 pandemic aggravated the socioeconomic crisis, which had already begun a couple of years previously. The pandemic ended the modest recovery of 2019 and triggered a painful decline in all relevant indicators. Oil and gas prices plummeted, slightly recovering only during the last quarter of 2020 above \$50 per barrel. Authorities expected GDP to fall by at least 3.2% for the calendar year 2020. Inflation increased to some 14% and the authorities fixed the official currency exchange rate at NGN381: \$1. On the parallel market, however, the rate was around NGN480: \$1. Compared to recent years, the country's foreign reserves plummeted to some \$35 billion and 21 tons of gold. External debt reached new heights, amounting to \$31 billion. Domestic debt, however, amounted to a worrisome \$54 billion. The debt/GDP ratio was close to 50%. Current account balance deficits were on the rise, indicating a long-lasting negative trend (the current account balance was \$-17,016.4 million in 2019). The budget deficit in 2020/2021 of close to 50% heralded new hardship and high unemployment rates all over the country, particularly in the poverty-stricken north. Official unemployment rates are unreliable, given the enormous size of the informal sector, but it was 8% in 2020.<sup>13</sup>

Nigeria's economy relies heavily on commodities. Oil plays a dominant role in Nigeria's economy, contributing significantly to foreign exchange revenue. The country's reliance on oil exports makes it vulnerable to fluctuations in global oil prices.<sup>14</sup> Indeed, the country faces challenges related to exchange rate volatilities and inflation, exacerbated by the pandemic and post-pandemic shocks. The Nigerian Naira has experienced depreciation, impacting living conditions due to high inflation.<sup>15</sup> Agriculture remains an important sector, with growth potential. There are opportunities to increase land productivity and enhance government interventions to support the agricultural value chain, including the horticulture sector-specific policies.

<sup>9</sup>2020 World Governance Indicators. <https://info.worldbank.org/governance/wgi/Home/Reports>

<sup>10</sup>Interview with Horticulture Society; interview with banana farmer in Kano.

<sup>11</sup>[https://Economy\\_of\\_Nigeria](https://Economy_of_Nigeria)

<sup>12</sup><https://www.worldbank.org/en/country/nigeria/overview> (2017-10-10)

<sup>13</sup><https://bti-project.org/en/reports/country-report/NGA#pos9>

<sup>14</sup>Sami, S. and Taiwo, M. (2023) Effect of Crude Oil Prices and Production on the Performance of Nigerian Gross Domestic Product: A Conceptual Framework. *Journal of Human Resource and Sustainability Studies*, 11, 698-711. doi: 10.4236/jhrss.2023.113038.

<sup>15</sup>Interview with the president, National Tomato Producers' Association, FGD with farmers in Kura; Interview with NYIYA farms.

The Nigerian government has introduced initiatives to promote industrialization, emphasizing private sector-driven development and foreign direct investment.<sup>16</sup> The services sector in Nigeria has been growing steadily, contributing significantly to GDP. Key subsectors driving this growth include banking, information and communication technologies (ICT), tourism, and transportation.<sup>17</sup>

The foundations of market-economy-based competition exist in Nigeria. However, the informal sector remains strong. The estimated size of the informal sector in Nigeria is 65% and consists of activities that range from agricultural production to mining and quarrying, small-scale building and construction, and machine-shop manufacturing.<sup>18</sup> Estimates of the size of the informal sector suggest that the actual GDP of the country may be much higher.<sup>19</sup>

In terms of human development, Nigeria ranked 163rd out of 189 countries in the global Human Development Index (HDI) for the year 2023, with a score of 0.535.<sup>20</sup> The comparative value for Sub-Saharan Africa is 0.547, and 0.737 for the world average. While Nigeria falls within the low human development category, there are significant disparities in the distribution of progress, especially between states and income groups. Nigeria's adult literacy rate is around 51%. But this figure does not reflect the extreme north-south dichotomy. School enrolment in the south is 70% and in the underdeveloped and poverty-stricken north only 30%.<sup>21</sup> Hence, collaboration among key stakeholders in the country remains critical for addressing widening inequalities and promoting inclusive development across states in the country.

### 1.3. INCOME AND POVERTY

In terms of Nigeria's broader social context, the country faces complex challenges related to income distribution and poverty alleviation.<sup>22</sup> Nigeria's poverty rate was estimated at 40% in 2020.<sup>23</sup> The number of Nigerians living below the national poverty line is projected to rise by 13 million between 2019 and 2025.<sup>24</sup> Moreover, the percentage of the population living in extreme poverty, defined as earning less than \$2 per day, is also substantial, with estimates suggesting that around 25% of Nigerians fall into this category.<sup>25</sup> Sixty-three percent of people-133 million-are multidimensionally poor. Multidimensional poverty is higher in rural areas, where 72% of people are poor, compared to 42% of people in urban areas. Sixty-five percent of poor people-86 million-live in the North, while 35%-nearly 47 million-live in the South.<sup>26</sup> Poverty levels across States vary significantly, with the proportion of the population (incidence) living in multidimensional poverty ranging from a low of 27% in Ondo to a high of 91% in Sokoto.<sup>27</sup> These statistics underscore the persistent income disparities within the country, with many Nigerians facing daily economic challenges. While Nigeria has experienced periods of economic growth, particularly driven by its oil industry, the distribution of the benefits of this growth has not been even. A significant portion of the population, especially in rural areas, still grapples with poverty and limited access to basic services.<sup>28</sup> Weakened economic fundamentals led the country's persistent inflation to reach a 17-year high of 25.8% in August 2023, which, in combination with sluggish growth, is leaving millions of Nigerians in poverty.<sup>29</sup> Prices of food items have also continued to increase, making the cost of living excessively high for the average Nigerian.<sup>30</sup>

<sup>16</sup>Interview with the national president of the Tomato Association; interview with the national president of national onion producers, and processors.

<sup>17</sup><https://www.brookings.edu/articles/nigerias-industries-without-smokestacks-are-delivering-better-economic-opportunities-than-traditional-sectors/>

<sup>18</sup>Inequality in Nigeria: Exploring the drivers (maketaxfair.net)

<sup>19</sup><https://www.statista.com/topics/6440/key-indicators-of-nigeria-s-economy/>

<sup>20</sup><https://hdr.undp.org/data-center/country-insights#/ranks>

<sup>21</sup><https://bti-project.org/en/reports/country-report/NGA#pos9>

<sup>22</sup><https://www.worldbank.org/en/country/nigeria/overview#:~:text=Economic%20overview&text=Weakened%20economic%20fundamentals%20led%20the,millions%20of%20Nigerians%20in%20poverty.>

<sup>23</sup><https://nigerianstat.gov.ng/elibrary/read/1092>

<sup>24</sup><https://www.worldbank.org/en/country/nigeria/overview#:~:text=Economic%20overview&text=Weakened%20economic%20fundamentals%20led%20the,millions%20of%20Nigerians%20in%20poverty.>

<sup>25</sup><https://nigerianstat.gov.ng/elibrary/read/1092>

<sup>26</sup>[https://www.undp.org/sites/g/files/zskgke326/files/202212/MPI\\_web\\_Nov15\\_FINAL\\_2022%20%285%29%5B45%5D.pdf](https://www.undp.org/sites/g/files/zskgke326/files/202212/MPI_web_Nov15_FINAL_2022%20%285%29%5B45%5D.pdf)

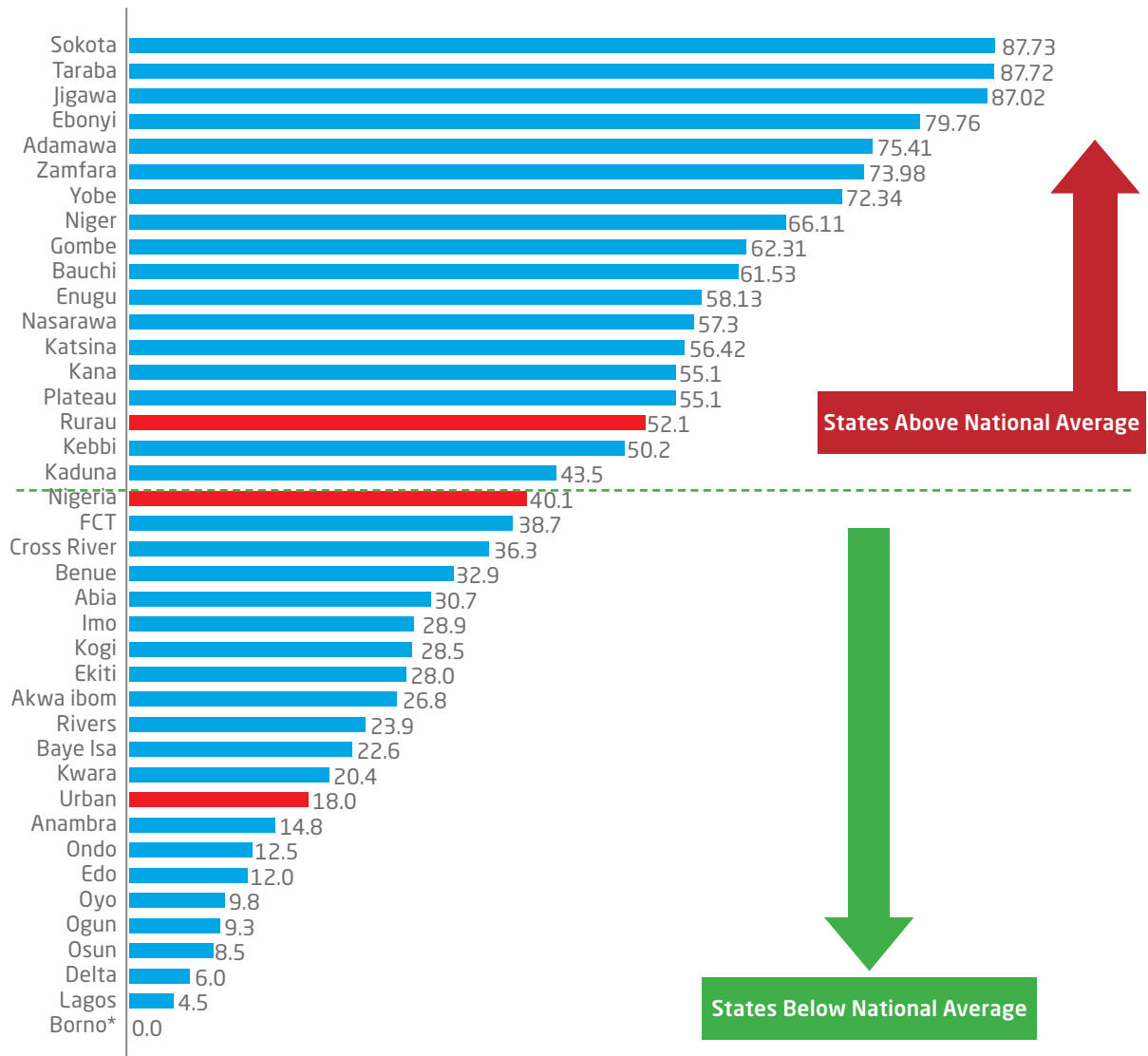
<sup>27</sup>[https://www.undp.org/sites/g/files/zskgke326/files/202212/MPI\\_web\\_Nov15\\_FINAL\\_2022%20%285%29%5B45%5D.pdf](https://www.undp.org/sites/g/files/zskgke326/files/202212/MPI_web_Nov15_FINAL_2022%20%285%29%5B45%5D.pdf)

<sup>28</sup>[https://www.undp.org/sites/g/files/zskgke326/files/202212/MPI\\_web\\_Nov15\\_FINAL\\_2022%20%285%29%5B45%5D.pdf](https://www.undp.org/sites/g/files/zskgke326/files/202212/MPI_web_Nov15_FINAL_2022%20%285%29%5B45%5D.pdf)

<sup>29</sup><https://www.worldbank.org/en/country/nigeria/overview#:~:text=Economic%20overview&text=Weakened%20economic%20fundamentals%20led%20the,millions%20of%20Nigerians%20in%20poverty.>

<sup>30</sup><https://www.readcube.com/articles/10.2139%2Fssrn.2827993>

## POVERTY HEADCOUNT RATE (percentage of population)



Likewise, economic growth has not been inclusive, and Nigeria's economy faced key challenges of lower productivity and the weak expansion of sectors with high employment elasticity.<sup>31</sup>

There is widespread and deep-seated social exclusion caused by poverty. The Gini-Index was 35.4 in 2020, indicating significant disparities in wealth distribution across the population.<sup>32</sup> The economic crises, in particular the COVID-19 pandemic, significantly reduced the GDP in 2020 and caused a negative growth rate in 2020. Addressing income inequality and poverty reduction thus remains a key priority for Nigeria's policymakers to ensure sustainable and inclusive economic development across the nation.

## 1.4. GENERAL HUMAN RIGHTS SITUATION IN NIGERIA

Nigeria's human rights framework is rooted in international conventions and domestic legislation. The Universal Declaration of Human Rights, the African Charter on Human and Peoples' Rights, and the United Nations Declaration on the Right to Development serve as foundational documents guiding Nigeria's commitment to human rights. Nigeria is a party to several international human rights treaties, which provide a framework for safeguarding fundamental rights and freedoms. These include the International Covenant on Economic, Social, and Cultural Rights. The Nigerian Constitution emphasizes the importance of economic development while upholding human rights.

<sup>31</sup><https://www.brookings.edu/articles/nigeria-in-2023-bridging-the-productivity-gap-and-building-economic-resilience/>

<sup>32</sup><https://bti-project.org/en/reports/country-report/NGA#pos9>



Chapter 2 of the Nigerian Constitution outlines fundamental principles of state policy, including the obligation to “promote a planned and balanced economic development” to enhance the welfare of all citizens. Nigerian courts have also recognized the application of human rights principles to businesses, enabling legal actions against companies for human rights abuses, negligence, or wrongful dismissal. Nigeria’s legal framework provides opportunities for redress when businesses fail to uphold human rights standards.

While Nigeria has established a comprehensive legal framework, there are notable human rights concerns, and the country faces a range of human rights challenges. One of the pressing issues is the implementation and enforcement of labor rights under the Decent Work Agenda, including adherence to International Labor Organization (ILO) conventions. Many workers in Nigeria still face challenges related to decent working conditions, fair wages, and protection from forced labor.<sup>33</sup> Additionally, gender disparities persist in the workforce, with women often experiencing discrimination and unequal opportunities.<sup>34</sup>

In the context of business and human rights, the Nigerian government has made efforts to implement the United Nations Guiding Principles (UNGPs) for Business and Human Rights. The development and

implementation of NAPs is a key opportunity for creating a centralized system for holding businesses accountable for human rights abuses. The NAP mandates all regulatory bodies and agencies to ensure the conduct of Human Rights Due Diligence and Human Rights Impact Assessment in all business operations. The National Working Group on Business and Human Rights (NWGBHR) coordinates all activities of agencies that engage in dealing with human rights and business-related issues. Notwithstanding, the business and human rights landscape in Nigeria presents its own set of challenges. Enforcement of the legal framework under the NAP that includes protections against violations by businesses remains a concern.<sup>35</sup> Property rights, particularly regarding land expropriation for commercial purposes, have raised issues of inadequate compensation and delayed payments.<sup>36</sup> Within the horticulture sector, there are opportunities to address some of the gaps in Nigeria’s business and human rights environment, particularly in the use of child labor, and gender discrimination among others. Lobbying, advocacy, and social dialogue with trade unions, local and international non-governmental organizations, civil society organizations, and private sector interprofessional bodies can be effective pathways to address some of the gaps in Nigeria’s business and human rights environment.

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<sup>33</sup>Interview with Niyya farms; FGD with farmers in with Niyya farms.

<sup>34</sup>Interview with Niyya Farms.

<sup>35</sup>Interview with Deputy General Secretary of Agricultural and Allied Employees’ Union of Nigeria

<sup>36</sup>Interview with the president of, the Horticulture Society of Nigeria.

# CHAPTER 2: HORTICULTURE STAKEHOLDER MAPPING IN NIGERIA

## 2.1 STAKEHOLDER MAPPING SUMMARY

The Nigeria Horticulture value chain comprises various public and private sector actors from production through processing to final markets/consumers. Key players include smallholder farmers, farmer cooperatives and associations, and medium to commercial farms, which supply raw commodities. Traders aggregate these commodities or food companies process them to add value. Additionally, medium to large processing companies and institutions contract farmers, either individually or based on associations/cooperatives, to supply raw materials for domestic markets and exports. Service providers, NGOs, employers' associations, and inter-professional bodies, sometimes in collaboration with international federations and agencies, support workers (and farmers) with their needs and living conditions. Processing and export are more predominant in the vegetable sector than in fruits and seeds. Trade unions and employers' associations have limited presence in the horticulture sector due to its nascent structures and informality. Public, and private agencies and international development actors provide research, extension, quality control, and export promotion services to support various stakeholders. The actors depend on the existing climate and policy environment to access horticulture sector produce locally and globally from farm to consumer markets. Appendix 2 provides detailed mapping, with a summary discussion below.

### 2.1.1 INPUT SUPPLIERS AND SERVICE PROVIDERS

Key input suppliers include agro dealers providing seeds, fertilizers, agrochemicals, and farming equipment. Major companies such as Notore Seeds, Seed Project Company, DuduOsun Farm, and Dizengoff West Africa offer services like extension, soil testing, and weather advisory. However, many smallholder farmers struggle to access quality inputs and advisory services.

Critical input suppliers include those providing seeds, financing, and technical services during pre-production stages. Companies like Premier Seeds Nigeria, Seed Co Nigeria, Harvest Field Industrial Ltd., Technisem Agro Ltd., MIAGRO, Syngenta, Jubbaili Agro Chemicals, BAYER, Contec Global Agro Limited, Kalli Fertilizer, BiOWiSH Fertilizer, Bejo Zaden, FEPSAN, and Notore Chemical Industries Plc provide seeds, fertilizers, and crop protection products. They collaborate with subnational partners to supply products across the country.

Institutions like Sahel Capital, Access Bank, and NIRSAL Microfinance Bank provide farmers and producers with loans and credits. However, smallholders often resort to micro-level investment companies or cooperatives due to limited evidence of payback plans or collaterals. Despite government interest in the horticulture sector, funding from institutions like the Central Bank of Nigeria, Bank of Agriculture, Bank of Industry, Nigeria Sovereign Investment Authority, and commercial banks remains patchy or has yet to materialize.

Agribusinesses like Ddee Farms, Babban Gona, TAK Integrated Company, Thrive Agric, and Sahel Consulting, Agriculture and Nutrition Ltd offer end-to-end support to smallholder farmers, focusing on financial, packaging, and quality standards. NGOs like Solidaridad, TechnoServe, and SNV pilot sustainable production programs, focusing on mobilizing private sector partners and empowering women farmers. Agencies like GIZ, and USAID fund projects and provide technical assistance to support food production, skills development, and livelihoods.

### 2.1.2 PRODUCTION

The majority of producers in Nigeria are smallholder farmers or farm cooperatives engaged in cultivating crops and receiving inputs for their operations. Key examples of vegetable and seed farmers, cooperatives, or producers in Nigeria include Fadama III AF Tomatoes Association, SLB Nigeria Ltd, Jawara Nigeria Ltd, SLB Onion Nigeria, Yadakwari Kofar Gabas Fadama III AF, among others. Key fruit producers include Degold Farms, Orange farmers in Otukpo, Ushongo, and Vandeikya, and Pineapple growers in Ovia, among others.

**Informal Smallholder Farmers and Groups:** Informal smallholder farmers make up a large majority of horticulture producers in Nigeria, accounting for over 70% of production by subsistence farmers. They typically operate on small plots of land (often under three hectares), using basic tools and farming methods passed down through generations. Examples include vegetable farmers in Bunkure, horticultural farmers at Niyya Farms, tomato farmers in Kaduna, the National Onion Producers Processors and Marketers Association of Nigeria (NOPPMAN), Alhaji Uba Banana Farm, and Alheri Women Tomato Farmers Association.

Common issues highlighted throughout included limited access to improved inputs like fertilizers and quality seeds, lack of irrigation infrastructure or farming technology, poorly integrated value chains, and heavy reliance on rainfed agriculture. These challenges lead to low yields and low incomes. Small informal farmer groups aim to provide social support and livelihood opportunities to members through collective action. However, they often lack organizational capacity and have limited access to finance, markets, extension services, and resources to truly upgrade the activities of their members. For example, the Fadama III tomato farmer groups in Kano state work together in production but continue to rely on local intermediaries for marketing. The farmer group has extremely limited bargaining power. They largely work as cooperatives and have limited relationships with formal trade unions.

#### Contract and Organized Smallholder Farmers:

Contract farming provides smallholder groups with opportunities to access informal export markets, overcoming barriers they would otherwise face alone. Groups like the horticulture farmers at Niyya Farms partner with processors and exporters through schemes and contracts that provide access to inputs, production finance, technical assistance, and guaranteed markets. This allows farmers to increase productivity and quality. However, even organized groups still face tight repayment schedules, input costs, failure to meet stringent buyer quality demands, and reliance on buyer pricing models. The benefits ultimately depend on the strength and independence of farmer groups alongside contract terms. Contract and organized smallholder farmers are most likely to affiliate with sector-based cooperatives and associations and not labor unions. They have more collaboration with private companies that support their organization, focusing on productivity and profitability rather than labor rights.

**Table 2.1:** Some key horticultural producers

| PRODUCERS  | TOTAL PRODUCTIONS  | TYPE OF PRODUCE                              | LOCATION       | OUTGROWERS AND CONTRACT FARMING   | YEAR             |
|--|--|--|----------------|---|------------------|
| Premier Seeds Nigeria Limited                                | -  | Seeds  | Kaduna         | About 3000 out-growers (related to rice/ maize and vegetables)  | 2023             |
| Niyya Farms  | Owens about 3000 hectares of land for fresh fruit production                                     | Orange, Mango, Passion, Guava, and Pineapple | Kaduna         | Provides tillage services to the local farm community at subsidized rates to ensure participation/engagement    |                  |
| Kuda Gangara Integrated Tomato Farm (Olan Group Limited)     | 4000MT   | Tomatoes                                     | Jigawa state   | 1,943 out-growers   | 2023             |
| Tropical General Investments (TGI) Group (WACOT Limited)     |  | Sesame seeds                                 | Lagos          | Over 1500 farmers are part of the Sesame Outgrowers program   | 2023             |
| Dangote (Open Farms, Greenhouse Farms and Tomato Processing) | 3 million seedlings per day and produce Tomato concentrate in bulk packaging of 200kg and 1000kg | Tomatoes                                     | Kano and Lagos | Farmer groups like Yadaqwari Kofar Gabas, Fadama III AF Vegetable farmers at Bunkure, and over 5000 out-growers | 2019 (shut down) |

**Farmer Associations:** These exist in different strands, including those registered as associations like the National Tomato Growers and Processors Association, which aims to represent and advocate for the interests

of member farmers, processors, and marketers within policy and value chain spheres. They provide input and markets to their outgrowers and services like sharing market information, facilitating access to inputs, and

delivering extension support to their members. However, they often lack strong financial resources, technical capacity, bargaining power, and independence. For example, tomato farmer associations struggled to curb market volatility and importer influence during Nigeria's 2017 tomato crisis. Interviews with their leadership indicate they work through local government area cooperatives and not labor unions. They are, however, open to cooperating with the Nigeria Union of Agriculture and Allied Employees (NUAAE) of the National Labor Commission (NLC) if they can be sure of the direct benefits of cooperating with trade unions and providing recognizable platforms for formalizing their members who operate mainly in the informal sector. Other examples include the All-Farmers Association of Nigeria (AFAN), which advocates for farmers within policy circles. There are also semi-formal and informal groups such as the National Onions Producers, Processors, Marketers Association of Nigeria (NOPPMAN), National Pepper Producers, Processors, and Marketers Association of Nigeria, among others, who produce similar crops and are interested in specific farmer sub-groups without formally affiliating with trade unions or being interested in the labor conditions of their workers/members. Key examples are community- and farmer-based groups in Kaduna, Kano, etc., who have come together due to knowledge dissemination and provide support for each other's farms.

**The Seed Entrepreneurs Association of Nigeria (SEEDAN):** SEEDAN is a professional umbrella body for all seed companies in Nigeria, established in 1993 to drive the development of Nigeria's seed industry. It represents seed companies, entrepreneurs, researchers, and other stakeholders involved in the seed value chain. With over two hundred members comprising seed companies, entrepreneurs, researchers, and other stakeholders, with sixty-seven of these being in the private sector, SEEDAN's objectives include promoting improved seed adoption, facilitating access to finance and markets for seed businesses, advocating for supportive policies, and building capacity through training and knowledge sharing. Key initiatives include the annual National Seed Trade Fair, training programs, finance facilitation, and policy engagement. SEEDAN collaborates with the National Agricultural Seeds Council (NASC), research institutions, development partners like AGRA, and international seed organizations.

**All Farmers Association of Nigeria (AFAN):** AFAN is the umbrella organization representing the interests of farmers across Nigeria. Founded in 1978, it serves as

the unified voice for Nigerian farmers and agribusinesses. The association comprises farmers from all over Nigeria, involved in different farming activities such as crop production, fisheries, poultry, livestock, agro-processing, and more. Its membership base spans the entire agriculture value chain across Nigeria, with an estimated number of over 10 million farmers, and membership is voluntary and open to all farmers upon payment of registration and annual subscription fees. AFAN operates as a non-profit, non-governmental professional association rather than a labor union. However, it does advocate for farmers' economic rights and welfare like trade unions. It is active in all thirty-six states and the Federal Capital Territory through state and local government area chapters, covering all sub-sectors of agriculture including crop farming, animal husbandry, fisheries, agro-processing, and marketing. It partners with Federal and State Ministries of Agriculture and Rural Development, the Central Bank of Nigeria and Bank of Agriculture, the National Agricultural Seeds Council, the Agricultural Research Council of Nigeria, and other international development agencies such as FAO, IFAD, and USAID, among others.

**Federation of Agricultural Commodity Association of Nigeria (FACAN):** FACAN is an active umbrella association at the federal level with over 50 registered member commodity associations. Recognized by the Nigerian government as the apex commodity association, FACAN emerged in 1991 as an alternative to the then-defunct marketing boards. The association became active in 2010 and now assumes the mission of "promoting mutual understanding among the agricultural commodity associations and creating an enabling environment for a unified agricultural sector that is better positioned operationally and financially to deliver value-added services in agriculture and allied business." Some of its key associations relevant in the horticulture sector include the Ginger Association of Nigeria (GAN), Sesame Farmers Association of Nigeria (SFAN), National Banana and Plantain Growers, Processors and Marketers Association of Nigeria, National Association of Mango Producers, Processors, and Marketers of Nigeria (NAMPPAMN), and National Pepper Producers, Processors, and Marketers Association of Nigeria. FACAN does not belong to a trade union but is primarily focused on promoting the interests of farmers and other value chain actors involved in specific crops. They engage in advocacy, market development, capacity building, and information-sharing activities.

**Table 2.2: Key farmer organizations, and associations**

| MAIN FARMER ASSOCIATION/ COOPERATIVES  | KEY ACTIVITIES  | TOTAL NUMBER OF MEMBERS   | UNIONIZATION STATUS (unionised/ nonunionised)  | COVERAGE (local, sub-national, national) |
|--|---|---|--|--|
| National Tomato Growers and Processors Association                                       | Advocate for the interests of members.  | Marketers = 10,000<br>Processors =5,000<br>Producers =30,000  | Not unionised, but some of its Factory workers are members of the National Union of Food, Beverage, and Tobacco Employee | National                                 |
| NOPPMAN (National Onions Producers, Processors, Marketers, Association of Nigeria)       |   | 1 million and fifty-two thousand members  | Not unionized (But engages NLC through the "Amalgamated Union of Foodstuff and Cattle Dealers of Nigeria (AUFCDN)        | National                                 |
| Agricultural Fresh Produce Growers and Exporters Association of Nigeria (AFGEAN)         | Supporting the growth and development of the Nigerian fresh produce export sector. By achieving their aims, AFGEAN can help farmers increase their yields, improve the quality of their produce, and connect with international buyers. | 5000-10000 members  | Not unionised  | National                                 |
| Tomatoes and Orchard Producers Association of Nigeria (TOPAN)                            | Aims to increase food security, and access to safe, nutritious, and sufficient tomatoes and orchards contributing.  | Over 50000 members  | Not unionized but collaborate with farmers mostly as clusters in tomato farming and processing                           | National                                 |
| National Association of Mango Producers, Processors, and Marketers of Nigeria (NAMPPAMN) | The association promotes the mango industry's development and supports its members to improve production, processing, and marketing practices.  | It has members across the country   | Not unionized but part of AFAN   | National                                 |
| National Pepper Producers, Processors and Marketers Association of Nigeria               | Trade association that represents the interests of stakeholders in the pepper value chain in Nigeria.   | The estimated number is about 20000   | Not unionized but part of FACAN  | National                                 |
| Mile 12 International Market and Farmers Association                                     | Leading wholesale vegetable market in Nigeria.  | About 200,000 farmers, 40,000 aggregators/ suppliers, and 10,000 market traders                                     | Not unionised  | State and local                          |
| All Farmers Association of Nigeria (AFAN)  | Advocacy association representing the interests of smallholder farmers across Nigeria.  | It has over 10 million smallholder farmer members across all 36 Nigerian states plus the Federal Capital Territory. | Not unionized but cooperates with trade unions. Mainly works with associations and cooperatives                          | National, local                          |
| Federation of Agricultural Commodity Associations of Nigeria (FACAN)                     | An active umbrella association at the Federal level.  | Over 50-member commodity associations   | Not unionised  | National                                 |
| The Seed Entrepreneurs Association of Nigeria (SEEDAN)                                   | An association of seed sellers and companies.   | Over 200 registered members/ companies  | Not unionized but regulated by the NASC  | National                                 |
| AFGEAN   Agricultural Fresh Produce Growers and Exporters Association of Nigeria         | Supporting the growth and development of the Nigerian fresh produce export sector. By achieving their aims, AFGEAN can help farmers increase their yields, improve the quality of their produce, and connect with international buyers. | 5000-10000 members  | Not unionised  | National                                 |

**Farmers' Cooperatives:** large-scale producers and businesses establish a myriad of farmer cooperatives through projects and associations easy management and support to farmers. In most horticulture-producing areas, AFDB, WB, and IFDC projects have established cooperatives as part of strategies to tailor support to farmers. These cooperatives are highly formalized, with classic examples being the CAFÉ created as part of the FADAMA II and III. However, some private sector producers and processes such as Sitcamo Nigerian Limited, and WACOT Limited, and service providers such as TechnoServe and Solidaridad have also organized semi-formal and informal cooperatives among farmers and marketers in their catchment areas to

provide them with inputs and extension services while ensuring they get the first offer to buy or market their products on their behalf. Some of these cooperatives include AA Multi-purpose Cooperative Society, MYS Multi-purpose Cooperative Society, Shiga Youth and Farmers Association, Water Users Association (WUA), Shikara Farmers Multi-purpose Cooperatives Society, Shika Trading Multi-trading Career Cooperative Society, and WACOT Trading Multi-trading Career Cooperative, among others. These cooperatives are local area-based and not affiliated with unions but with other region-based cooperatives in some instances. They focus on the profitability and productivity of the members rather than their welfare and labor situation.

**Table 2.3: Key farmer cooperatives**

| MAIN COOPERATIVES                                      | KEY ACTIVITIES  | TOTAL NUMBER OF MEMBERS       | UNIONIZATION STATUS (unionised/ nonunionised)  | COVERAGE (local, sub-national, national)            |
|--|---|-------------------------------|--|---|
| AA multi-purpose Cooperative society                   | AA Multi-purpose Cooperative is one of the biggest cooperatives in south-south Nigeria. It has over 1,000 farmer members trained in Good Agricultural Practices (GAP) to improve crop production. Members of the cooperative enjoy grants and subsidies to aid their production and livelihood.   | 900-1100                      | Not Unionised but cooperative members enjoy grants and subsidies to aid their production and livelihood. | Semi-state/ Sub National (All 6 South-South states) |
| Shiga youth and farmers association                    | Shiga Youth and Farmers Association of Nigeria is an agricultural and agri-business-driven organization. Their mission is to create an ecosystem that provides socio-economic services, encourages high ethical standards, and advances sustainable development in Nigeria through agriculture. Shiga Youth and Farmers Association of Nigeria is an agricultural and agri-business-driven organization. Their mission is to create an ecosystem that provides socio-economic services, encourages high ethical standards, and advances sustainable development in Nigeria through agriculture. | Over 900,000                  | Not Unionised  | Sub National (Northern Nigeria)                     |
| Water Users Association (WUA)                          | The World Bank established these WUAs worldwide, particularly in regions with agriculture or where water resources are scarce. Farmers or other water users in a specific area typically form WUAs. Membership can be voluntary or mandatory, depending on the local regulations. The WUAs also serve as a voice of advocacy for the members. In terms of benefits, WUAs can improve water management efficiency and ensure fairer water distribution among members.  | 3000-5000 smallholder farmers | Not Unionized  | Sub National (Northern Nigeria)                     |
| Shika Trading multi-trading career Cooperative Society | Aims to improve the lives of its members who are mostly wet and dry-season farmers by providing numerous services including Access to credit and loans.   | 700-1000                      | Not Unionised  | Sub National  |
| WACOT trading multi-trading career cooperative.        | Farmers who supply to Tropical General Investments (TGI) Group (WACOT) organize this cooperative. It is an international investment and holding company with diversified interests and investments across Africa, The Middle East, Asia, and other emerging markets.  | Over 70000 Out-grower farmers | Not Unionised  | National  |

Continuation of the table Table 2.3: Key farmer cooperatives

| MAIN COOPERATIVES                | KEY ACTIVITIES  | TOTAL NUMBER OF MEMBERS   | UNIONIZATION STATUS (unionised/ nonunionised) | COVERAGE (local, sub-national, national) |
|----------------------------------|---|---|---|--|
| Service providers<br>TechnoServe | In agriculture, TechnoServe interventions have targeted the maize, rice, cashew, tomato, cassava, soy, and poultry value chains, increasing smallholder productivity and income, improving access to inputs and finance, and strengthening market linkages. Focuses on Smallholder Farmers: TechnoServe's work in Nigeria targets smallholder farmers in the horticulture value chain. This means they focus on supporting individual farmers with small landholdings. Project Examples: Horticulture Project: This recent project aimed to increase access to fruits and vegetables while improving the resilience of low-income communities in Delta and Kaduna States. TechnoServe has also worked on projects involving crops like tomatoes and rice, which can be part of the horticultural value chain.<br><b>Services Offered</b> include<br><b>Training:</b> TechnoServe offers training programs on improved agricultural techniques specific to horticulture crops, post-harvest handling practices, and business skills<br><b>Market Linkages:</b> They help connect farmers with better markets and buyers for their produce.<br><b>Access to Inputs:</b> TechnoServe sometimes assists farmers in accessing necessary resources like seeds, fertilizers, or tools. | Not available but projected to be over 5000 small-holder farmers. | Not Unionised                                 | National                                 |
| Sitcamo Nigerian limited         | Sitcamo Nigerian Limited. They give you a loan to farm, and they will come to supervise you from the farm, and they will come to supervise you from when you plant to harvest   |   |   |  |
| WACOT Limited                    | WACOT is the leading food and agro-allied company investing in the value chains of various crops across Nigeria. For over 25 years, we have been revolutionizing the commodities export industry, tackling food security challenges, and enabling growth for all stakeholders. They also provide seed inputs and other inputs to smallholder farmers. Products include sesame processing, cotton ginning, rice milling, vegetable oils ginger, among others.  | Over 70,000 Out-grower farmers                                    | Not Unionised                                 | Sub-National and regional                |

**Commercial-scale Producers:** Some farms produce through a combination of their farms and cooperatives, with key examples being Dangote Tomatoes with over 5000 out-growers, Premier Seeds Nigeria Limited with over 3000 out-growers, and WACOT with over 1500 farmers, among others. The majority of these large-scale farms are into vegetable production, seeds, and a few fruits. While these large-scale producers employ permanent workers as supervisors and technicians, farmhands, and processors, among others are employed on a casual basis.

These casual employees are neither organized by trade unions nor affiliated with enterprise-based associations or cooperatives.

In most cases, these large-scale producers organize casual employees into cooperatives for easy management.

### 2.1.3 PROCESSING/ PROCESSORS AND PACKAGING

Across the value chain, processing is a key activity, and the study identified three classes of processors, with their characteristics and structures discussed below:

**Table 2.4: Overview of the structure of some processing companies in the horticulture sector**

| SIZE            | PROCESS VOLUME (MT) | INSTALLED CAPACITY | EXPORT VOLUME (IN MT) | TOTAL NUMBER EMPLOYED | EXAMPLES  |
|-----------------|---------------------|--------------------|-----------------------|-----------------------|---|
| Small to medium | <2000<br><2000      | <10<br><10         | <10,000<br><10,000    | <10 and<br>> 100      | ReelFruit, Agricorp International, Niyya Farms Group Limited (Niyya Farms and Drinks Company Limited) |
| Large           | >2000               | >10                | >10,000               | <100                  | Jos Tomato, Cubas Group (Star Tomato Paste), GB foods Africa, Olam, Dangote                           |

**Small-scale processors:** These companies vary significantly in size and sophistication. Small processors operate informally, supplying basic processed products like juices or pastes to local consumer markets. They rely on smallholder sourcing, possess minimal processing technology, and have limited quality assurance or market reach. Examples such as Mystrose Limited and Mama T fruit juice engage in small-scale and basic processing activities such as washing, peeling, juicing, slicing, and drying. The rise in small-scale processing firms, particularly those processing fruit juices, might have resulted from a directive to ban imported fruit juices and juice concentrates. Most workers in these small processing firms are not affiliated with unions. The absence of unions and enterprise-based associations underscores the increased casualization of labor, leaving a sizeable portion of workers without contracts and reporting long working hours, especially during seasonal grading and packing activities.

**Medium-scale processors:** These processors are typically engaged in more mechanized operations and utilize specialized equipment to produce branded and packaged end products in higher volumes with consistent throughput. Some medium-scale entrepreneurs specialize in packaging dry food mixes for retail markets in urban areas (e.g., ReelFruit in Lagos, Niyya Drinks, AACE), primarily targeting the domestic market. Technical workers in medium-sized enterprises are mainly permanent, with some affiliating with NUAAE and NUFBTE. Casual workers do not belong to unions, leading to an increased casualization of labor, resulting in a sizeable portion of workers without contracts and reporting long working hours, especially during seasonal grading and packing activities. Other examples include AACE, which processes dried spices, Gunni Royal Tomato paste, and Allied Company in tomato processing.

**Large-scale processors:** These companies represent commercially intensive operations with a daily production capacity of around 50 tonnes or more, often involved in high-quality packaging for domestic and export consumption. They offer contracts to farmers, provide technical assistance services, and negotiate purchasing prices before harvest, ensuring stable supply and mitigating against price volatility. Key examples include Jos Tomatoes and Dangote Tomato Processing, primarily focused on vegetables. The majority of these large-scale processors are registered members of NECA, AFAN, and FACAN and employ permanent, temporary, and casual workers. One key labor issue is the long working hours reported in some of these large-scale processing companies, especially during seasonal grading and packing activities. The majority of casual and seasonal workers associated with large-scale processors lack information or education about their legal rights, particularly their right to freedom of association, payment of at least the minimum wage, collective bargaining, and the conditions under which workers qualify for permanent contracts and associated social protections.

**2.1.4 EXPORTERS**

These are formal and informal company entities with a commercial focus on working with smallholders through contracts or off-taker schemes. They range from small to medium scale. Formally, exporters such as RichFruit, and Taraba Vegetables Ltd among others register under the Nigeria Export Promotion Council (NEPC) and meet export documentation-certification needs for smallholder beneficiaries and destination markets. Others also operate informally, especially targeting neighboring markets.

The small exporters in Nigeria’s horticulture sector are typically independent traders or small aggregator businesses focused on regional trade within West Africa.



They source produce from local rural assembly markets and urban wholesale centers to fill orders from neighboring countries like Benin, Togo, and Ghana. Mostly trading common staples like tomatoes, peppers, and onions, volumes range from a few trucks to a couple of containers per month. Distribution channels are semi-structured through agents and flexible payment terms. Labor mostly consists of small numbers of temporary packhouse staff and truck drivers operating old transport vehicles. Small exporters also work with cooperatives and associations such as the National Association of Mango Producers, Processors and Marketers of Nigeria (NAMPPAMN), and National Pepper Producers, Processors and Marketers Association of Nigeria in their local areas and not unions mainly. Key issues include high cross-border informal fees, quality and delivery reliability challenges, limited compliance with standards, and minimal branding. Examples include Wilson's Juice Co.

Medium exporters operate in higher volume export activities serving key regional and international markets, and medium firms exhibit more specialization and integration in supply operations. While still leveraging buying agents and farmer aggregators, they increasingly contract directly with farmer groups for specialty items and to ensure standards. Volumes range from 5-15 containers monthly for products like mangoes, peppers, sesame seeds, egusi, ginger, and dried hibiscus to Europe and the Middle East. Investment in packhouses, integrated cold transport, and quality assurance allows more consistent product supply and premiums for graded quality. Labor utilization rises significantly during peak seasons, including specialized staff for compliance and documentation. Medium exporters work with unions, cooperatives, and local associations in their local areas. For instance, the National Onion Producers, Processors, and Marketers Association collaborates with local cooperatives and also works with the Amalgamated Union of Foodstuff and Cattle Dealers of Nigeria affiliated with the NLC. They focus on lobbying for the sector and not on the welfare of workers associated with these exporters. While the study found large-scale processors (for both fruits and vegetables), there were limited numbers of formal large-scale exporters. These companies, such as Elephant Group PLC (for exporting ginger and others), among others, still rely on smallholder contract farming models for raw material supply.

Unlike countries like Ghana, Nigeria did not have many large-scale horticulture exporters. The few identified

in the value chain included the Elephant Group PLC (exporting ginger and others), WACOT (exporters of sesame seeds), and AACE Foods (dried spices), among others. Most of these large-scale exporters combine a process of managing their production as well as supervising cooperatives and out-growers to produce on their behalf. They offer inputs, extension services, and sometimes lease lands to their outgrowers. Some of these large companies exported to the West African markets, the Middle East, and the EU.

### **2.1.6 GOVERNMENT INSTITUTIONS AND REGULATORY BODIES**

The various central government institutions provide an indispensable institutional environment for coordinating national policies, regulating standards, facilitating linkages, and supporting research relevant to Nigeria's horticulture sector.

#### **Federal Ministry of Agriculture and Rural**

**Development (FMARD):** This oversees national policies and planning for agricultural development. Its key roles include coordination of federal initiatives, provision of extension support services to farmers, and value chain development. It also aims to address low smallholder productivity and profitability through programs improving production technologies, input access, market linkages, and capacity building. However, budget constraints on delivery capacity and locations reached through state agencies limit their impacts. From a labor rights perspective, the FMARD has a crucial role to play in ensuring decent work and protecting the rights of workers in the horticulture sector. However, the ministry's efforts in this regard have been inadequate, contributing to the persistence of poor working conditions and labor rights violations in the industry. One of the key issues is the lack of a comprehensive and effective labor inspection system within FMARD to monitor and enforce compliance with labor laws and regulations in the horticulture sector. This has allowed many employers to operate with impunity, exposing workers to hazardous conditions, long working hours, low wages, and lack of social protection.

**National Agricultural Seed Council (NASC):** This agency is responsible for regulating seed quality, promoting variety development, and catalyzing industry growth. Established in 2007, NASC's mandate is to ensure farmers' access to high-quality certified seeds, thereby driving agricultural productivity, food security, and income generation. NASC's core activities include seed variety registration, quality control and

certification, industry coordination, capacity building, and policy advocacy with about 314 companies. While NASC's primary focus is on the technical aspects of seed regulation and development, the organization's work inevitably intersects with labor issues within the seed sector workforce. From casual farm laborers in seed multiplication to factory workers in processing facilities and sales agents in agro-dealer networks, the seed industry employs a diverse range of workers across skill levels and occupational categories.

**The National Agricultural Extension and Research Liaison Services (NAERLS)** is a key agency under the Federal Ministry of Agriculture and Rural Development in Nigeria. Its primary role is to coordinate and support agricultural extension services across the country, including in the horticulture sector. NAERLS conducts research on extension methodologies, provides training to extension agents, and disseminates information on improved agricultural practices to farmers. In the horticulture sector, NAERLS collaborates with research institutes and universities to develop and promote technologies and innovations that enhance productivity and quality. However, NAERLS faces challenges in effectively reaching and supporting smallholder horticulture farmers, particularly in remote areas. Limited resources, inadequate extension agent-to-farmer ratios, and weak linkages between research and extension hinder the agency's impact.

**Standard Organization of Nigeria (SON):** This is the national body responsible for the development and enforcement of standards. For horticulture, SON develops commodity grades and codes for crops meeting quality parameters for domestic/export markets. This provides a common language for trade and aims to signal incentives through premium prices for higher-quality produce. The key challenge is the lack of mandatory status and extensive informal trade limits standards' effectiveness and enforcement.

**National Agency for Food and Drug Administration (NAFDAC):** This is the institution that assures safety and quality regulations around food processing and trade. NAFDAC registers and audits processing facilities certifies food/agricultural inputs and helps recall unsafe products. It also supports exporters in meeting international market requirements through testing and certification. Its work is, however, hampered by budget and capacity constraints, and corruption at ports which undermines consistent safety assurance.

**Nigerian Export Promotion Council (NEPC):** They promote support in developing export trade across all sectors of the horticulture value chain. NEPC implements export incentive programs and provides producer market information and exporter training services. Often, it aims to address key export bottlenecks - from inadequate infrastructure to limited trade finance. A broader economic and investment climate challenges within the country hinder NEPC's export expansion efforts.

**Nigerian Investment Promotion Commission (NIPC):** The Nigerian Investment Promotion Commission (NIPC) promotes and monitors investments in Nigeria, operating under the Ministry of Industry, Trade, and Investment (MITI). NIPC provides information and support to investors, facilitating their establishment in the country. In the horticulture sector, NIPC collaborates with the Federal Ministry of Agriculture and Rural Development (FMARD) to attract investments and support projects. However, NIPC's focus on investment promotion may overshadow labor issues, lacking specific programs addressing decent work or workers' rights in the sector.

**Federal Ministry of Labor and Employment:** This is responsible for formulating and implementing labor, employment, and workplace safety policies. Its mandate includes promoting harmonious industrial relations, enforcing labor laws, and ensuring the welfare of workers across all sectors, including horticulture. The ministry operates through various departments and agencies, such as the National Directorate of Employment, which focuses on job creation and skills development. It also has a Factory Inspectorate Division that conducts labor inspections to ensure workplace safety and health regulations compliance. While the ministry does not have specific programs targeting the horticulture sector, it plays a crucial role in addressing labor issues within the industry. This includes setting minimum wage standards, regulating working hours, and protecting workers' rights to freedom of association and collective bargaining.

### **2.1.7 LABOR UNIONS, AND ORGANIZATIONS**

**Trade Unions in Nigeria:** Nigeria has two trade union federations - the Nigeria Labor Congress (NLC) and the Trade Union Congress, Nigeria (TUC). The NLC (the largest center) is an amalgam of four trade union centers in Nigeria. While the then Federal Military government inaugurated the NLC in 1978, the government registered the TUC Nigeria (previously Senior Staff Consultative Association of Nigeria (SESCAN)) as

a labor center in 2005. The NLC has 48 affiliates while the TUC has 29 affiliates. Of NLC's affiliates, the Nigeria Union of Agric and Allied Employees (NUAAE), the Amalgamated Union of Foodstuff, Cattle Dealers of Nigeria (AUFCDN), and the National Union of Food, Beverage, and Tobacco Employees (NUFBTE) organize horticulture workers in production and processing, respectively. In respect of TUC's affiliates, the Food Beverage and Tobacco Senior Staff Association (FOBTOS), although operating in the food sector, does not organize horticulture workers.

Traditionally, trade unions in Nigeria have organized mainly formal sector workers. However, some trade unions are becoming open to associating with informal sector groups while some informal sector associations are taking steps to obtain trade union status. In 2023, the Nigerian authorities approved for registration of the Amalgamated Union of App-Based Transport Workers of Nigeria (AUATWON) to become an informal trade union. The AUATWON has a membership comprising of all app-based transport workers, online transport services, and e-hailing operators in Nigeria.

Additionally, there are a plethora of trade associations that have the characteristics of trade unions, but these do not have the registration status of trade unions as such. In the horticultural sector, these include the National Tomato Growers and Processors Association of Nigeria (NATPAN), National Association of Mango Producers, Processors and Marketers of Nigeria, National Onion Producers, Processors, Marketers, Association of Nigeria (NOPPMAN), and Agricultural Fresh Produce Growers and Exporters Association of Nigeria (AFGEAN).

**The Nigeria Union of Agric and Allied Employees (NUAAE)**, which is a merger of the Agriculture and Allied Employees Union of Nigeria (AAEUN) and the Agriculture and Allied Workers Union (AAWUN), organizes public and private formal sector workers in the production of agricultural products in Nigeria including fisheries, animal husbandry, and horticulture in line with the Trade Union Act (T14). However, NUAAE confirmed the majority of their over 20,000 memberships are from public enterprises as private formal enterprises are often not very cooperative and open for their workers to affiliate or join trade unions. Most of the current horticulture operations are either private formal or informal and the union has not made much progress in organizing them.

Through collective bargaining, NUAAE ensures that employees in the horticulture sector receive salaries/wages comparable to their peers in other sub-sectors and have access to basic employment benefits such as pensions, medical care, personal gratuities, and PPEs for those who work in hazardous environments as well as three months maternity leave for women employees on confinement. Aside from collective bargaining, NUAAE provides training to their members particularly on negotiation skills to enable them to bargain for better conditions of services. The union also encourages its members to form cooperatives so they can help each other. NUAAE is a member of IUF and receives support from FNV through IUF. The union aspires to organize informal sector workers in agricultural production including the horticulture sector and is, therefore, open to collaborating with FNV to unionize horticulture sector workers. The union, however, has been going through leadership struggles over the past fourteen (14) years which is having negative impacts on its operations. The current President of the union has apparently "overstayed but unwilling to leave" according to a staff of the union. A National Delegate Conference held in March 2024 to resolve the crisis resulted in the worsening of the situation and led to the creation of an additional faction in addition to the existing two factions. While an officer contacted expressed the union's willingness to organize informal sector workers including horticultural workers, any such partnership with FNV could face problems if there is no immediate and comprehensive resolution of the leadership crisis.

**The National Union of Food, Beverage, and Tobacco Employees (NUFBTE)** is a trade union representing workers in food processing and related industries in Nigeria. It is affiliated with the Nigeria Labor Congress and serves as one of the key affiliates of the Nigerian Council of the International Union of Food, Agricultural, Hotel, Restaurant, Catering, Tobacco and Allied Workers' Associations (IUF). The membership of the union has been growing steadily over the years, to over 160,000. More recently, the National Union of Food Beverage and Tobacco Employees, NUFBTE, and the Association of Food Beverage and Tobacco Employers, AFBTE, have reached an agreement on fair treatment of workers, especially outsourced and contract staff. The agreement is part of the efforts by both the Organized Labor and the employers' body to promote decent work in line with the International Labor Organization standards. Additionally, the guideline incorporates provisions for pension benefits. Upon retirement,

employees will receive their entitlements and continue to collect their pensions. The union reviews its collective bargaining agreements every two years, covering aspects such as dispute resolution, compliance with labor laws, and adherence to national standards. The union refers to contract staff as third-party employees or outsourcing. The leadership of the union is open to collaboration with FNV to unionize horticulture sector workers. They appreciate the large numbers of private sector actors in the processing leg of the horticulture value chains and they aspire to organize both formal and informal sector workers in processing aspects of the horticulture sector.

#### **Food, Beverages, and Tobacco Senior Staff**

**Association (FOBTOB):** The Food, Beverage, and Tobacco Senior Staff Association (FOBTOB) is one of the affiliates of the Trade Union Congress of Nigeria (TUC). The union came into existence after the restructuring of house unions in Nigeria into industrial unions. It received its certificate of registration under the Trade Unions (Amendment) Act No. 22 of 1978. The Union organizes membership mainly from the private sector companies and organizations. The union has more than seven thousand (7,000) members spread among fifty-two (52) branches throughout the Federation. FOBTOB seeks to organize workers who are qualified for membership; regulate the relations between Senior/Management Staff and other Staff and between Senior/Management Staff inter se and establish and maintain just and proper hours of work, rates of pay, and conditions of work. The union trains and educates its members on various facets of a trade union, the economy, and politics to produce a total unionist. The union exposes National Officers to leadership workshops (both local and international) and organizes women's seminars to promote gender sensitivity. While FOBTOB is increasing its organizing efforts and striving hard to improve and maintain the working conditions of its regular members, the trade liberalization policy of successive governments has resulted in the dumping of products in the country, which impacts negatively capacity utilization in the industry and our membership strength. Besides, some companies shut down as a result of supply chain challenges following the COVID-19 pandemic, while there were mergers among companies within the industry, leading to a decline in membership of the union. The union has not been too open about organizing informal sector workers in the processing aspects of the horticulture sector.

<sup>37</sup>Interview, NECA rep.

## **2.1.8 EMPLOYERS' ASSOCIATIONS AND INTER-PROFESSIONAL GROUPS**

**Nigeria Employers' Consultative Association (NECA)** is the umbrella organization of employers in the organized private sector of Nigeria. Founded in 1957, NECA provides advocacy and advisory support to employers and represents member interests in national policy discussions around business regulation, economic development, and labor laws, among others. It comprises over 4000 (with about 1000 just being active in terms of membership payments) private sector companies across manufacturing, construction, agriculture, banking, hospitality, and other sectors, with few engagements in the horticultural sector.<sup>37</sup> For instance, Niyya Food & Drinks Company Limited (NFDCL) and Niyya Farms Limited (NFL) (subsidiaries/member companies of the Niyya Farm Group (NFG)), which is a player in the horticulture sector, is an active member of the Nigeria Employers Consultative Association (NECA). It is worth noting that NECA represents both multinational corporations with Nigerian operations as well as Nigerian-owned SMEs, and members collectively employ around 8 million workers nationwide. In terms of structure, NECA has a headquarters in Lagos with six zonal offices covering different regions. The governance structure includes a Governing Council, Executive Committee, and Secretariat. Sector-specific groups like the Agriculture and Allied Group advocate on industry issues. NECA frequently interacts with labor unions and federations like the NLC in various tripartite policy forums to discuss industrial relations issues. However, NECA itself does not have a unionized workforce or engage in collective bargaining over working conditions as an employer. Instead, NECA convenes its business members, some of whom have unionized employees. The level of unionization within companies operated by NECA members varies widely across industries and individual firms, though their collective interests when it comes to labor regulations and negotiation frameworks shape unionization and bargaining dynamics in the economy.

Officials of NECA demonstrated a good understanding of decent work (e.g., Decent Work Convention) and believed the starting point of promoting decent work is to organize workers in the informal sector as it will allow regulation and enforcement, including compliance with Nigeria's labor laws. Affiliating informal sector workers will allow NECA to ensure workers have enforceable contracts.

“There is so much exploitation in the informal sector. The operations exploit the labor in the sector. Therefore, it will be a breath of fresh air for them to have an organization to come to rescue them. Unions do not exist in the informal sector and therefore an opportunity exists for FNV to be a pioneer developmental organization to make this significant impact.”

NECA is open to a partnership with FNV. The association has representation on the governing board of ILO, and it is an affiliate of the International Organization of Employers and the Federation of West African Employers. NECA is also an advocacy organization for employers and to some extent labor.

**The Nigerian Agribusiness Group (NABG)** is a leading private-sector association driving growth in Nigeria’s agricultural sector. With a diverse membership base, NABG serves as a platform for agribusiness interests across value chains - producers, processors, marketers, input suppliers, and financiers. NABG members are either full or affiliate members of labor unions. Some key initiatives of NABG include the annual Nigerian Agribusiness and Food Security Investment Forum, promoting investments and capacity-building programs like the Agricultural Transformation Agenda Support Program with USAID. The Promotion of Agribusiness Advocacy for Small-scale Producers project aims at increasing agricultural productivity for smallholder farmers, increasing smallholder farmer household income, increasing equitable consumption of a safe, affordable, nutritious diet year-round, and increasing women’s empowerment in agriculture.

NABG is a membership-based organization. Membership is in three groups or levels: (1) First is the processing companies or big aggregators such as Olam, Tropical Investment Limited (TGI Ltd), Nestle, etc. (2) The second category is national associations (62) such as the AFAN, TOPAN and (3) the last is individual professionals. It has over 170,000 smallholder farmers aggregated by NABG members in the last year.

NABG partners with IFDC, TechnoServe, AGRA, NEPC, CBN, FMARD, and State Agricultural Development Programs on initiatives spanning policy reforms, market access, finance facilitation, and value chain development. Through advocacy, investment promotion, capacity-building, and multi-stakeholder collaborations, NABG fosters an enabling agribusiness ecosystem,

contributing to food security, economic growth, and sustainable agricultural development in Nigeria.

NABG collaborates with farmers’ associations, cooperatives, and other industry associations along the value chain, including fertilizer associations, quality infrastructure associations, diplomatic missions, and capacity development bodies. The organization is currently implementing a National Agribusiness Agenda (NIAA) that would address wages, working conditions, safety, and contracts as well as the establishment of governance structures of cooperatives and associations.

**The Netherlands-African Business Council (NABC)** has a robust presence in Nigeria, fostering Dutch-Nigerian cooperation, particularly in the horticultural sector. Its HortiNigeria program strengthens the horticulture value chain through knowledge transfer, technology adoption, and market linkages between Dutch and Nigerian companies. Worker training on good agricultural practices, food safety, and sustainable production is a key focus. NABC implements projects promoting youth employment and women’s economic empowerment in horticulture, offering vocational training, entrepreneurship opportunities, and leadership development. This drives inclusive growth and decent work. Strategic partnerships with the Nigerian government, Dutch horticultural firms, local associations like NIHORT and HORTSON, and development organizations like UNIDO, FAO, and IFAD amplify NABC’s impact. Beyond horticulture, NABC facilitates business linkages through trade missions and knowledge sharing. It advocates for an enabling business environment, addressing labor issues and regulations across sectors. NABC’s multifaceted approach combines capacity building, market access, policy engagement, and collaborative partnerships to contribute to sustainable horticultural growth while prioritizing skill development, fair labor practices, and economic inclusion in Nigeria.

#### **2.1.9 DEVELOPMENT PARTNERS/ INTERNATIONAL DEVELOPMENT ORGANIZATIONS AND NGOS**

These include embassies, development partners, and organizations such as the Netherlands Development Organization (SNV), the Netherlands Embassy, USAID, GIZ, East-West Seed Knowledge Transfer (EWS-KT), Solidaridad Network, Netherlands Enterprise Agency, among others, who work by providing services and training to farmers and governments or supporting union groups to better the living conditions of workers.

**SNV Netherlands Development Organization:** SNV works extensively in Nigeria's agriculture sector, focusing on sustainable agriculture and poverty reduction. They provide technical assistance and capacity building and promote best practices among smallholder farmers and businesses in the horticulture sector. Specifically, they have piloted, implemented, and supported focused projects on commercial fruit and vegetable production, providing technical training and support to farmers through the horticultural sector. Key projects in Nigeria include working with other stakeholders such as the East-West, the Dutch Embassy, and other projects, and many other partners and farmers in the HortiNigeria project.

**USAID:** supports implementing projects in close collaboration with the Federal Ministry of Agriculture and Rural Development and private sector stakeholders. Significant focus goes towards strengthening food security and linking smallholder farmers to markets. For example, the Maximizing Agricultural Revenue and Key Enterprises (MARKETS II) project collaborates with farmer organizations and agriculture enterprises to improve productivity, post-harvest handling, and access to finance and buyers. Activities include facilitating partnerships where farmer cooperatives supply domestic food processors and restaurants with crops like tomatoes, chili peppers, and oranges. The initiative also supports youth-focused agriculture entrepreneurship through business accelerator programs.

**GIZ:** In Nigeria, GIZ implements projects aimed at strengthening domestic horticulture production and food security by working with the government and in close coordination with farmer-based organizations and private sector partners like agribusinesses and food companies to deliver program interventions. For instance, the "Nigeria Competitiveness Initiative for Horticultural Sector" (NICOP) project works to strengthen the capacities of farmer organizations and establish new buyer linkages for export markets. GIZ also implements programs focused on upgrading food safety and quality infrastructure including establishing the Centre for Nigerian Tomato Processors in Kadawa.

**Solidaridad Network:** In Nigeria, it runs interventions under the Nigeria Horticulture Initiative (NHI) seeking to improve productivity, quality, and access to high-value domestic and international markets. Activities span facilitating finance for equipment of farmer groups, cluster-based cold store infrastructure, and conducting food safety system traceability. The

Solidaridad network works to promote sustainable and equitable supply chains. In Nigeria, Solidaridad focuses on supporting the horticultural sector through various programs aimed at improving the livelihoods of smallholder farmers and workers. Current initiatives such as the Acting Now project target 12,000 farmers in Nigeria and support the sustainable production of fish, potatoes, maize, fruits, and vegetables in the states of Kaduna, Kano, Plateau, and Ogun. Solidaridad's FIDIS program supports farmers with seeds for the planting season. Solidaridad also works to address labor issues in the sector, such as advocating for fair wages, safe working conditions, and the elimination of child labor.

**TechnoServe:** This organization works across the agricultural and development value chain in Nigeria, such as implementing the YieldWise initiative to reduce post-harvest losses and the LAYER Values for Life project, enhancing poultry production and vegetable farming. Also, TechnoServe has facilitated shorter-term technical assistance partnerships between Nigerian fruit exporters and European buyers to upgrade supply and product quality. Their Strengthening African Processors of Fortified Foods (SAPFF) program also supports food processors, including horticultural products. While not explicitly targeting labor concerns, TechnoServe's approach focuses on developing inclusive value chains, promoting decent employment opportunities, and improving incomes for farmers and workers.

**Netherlands Enterprise Agency:** Works closely with the Dutch embassy to provide funding and support focused on innovative greenhouse technology demonstration, soil fertility programs, and avocado sapling distribution seeking to upgrade production. They facilitate Dutch business and knowledge transfer globally. In Nigeria's agriculture sector, they implement the Orange Corners program supporting young agripreneurs. Their Food Security through Improved Seed Systems project enhances seed sector development. While not directly tackling labor concerns, their capacity-building initiatives and entrepreneurship support indirectly contribute to job creation and improved livelihoods in Nigeria's agricultural workforce.

**World Bank:** The World Bank has supported Nigeria's horticultural sector through several projects, including the Commercial Agriculture Development Project, the West Africa Agricultural Productivity Program, the APPEALS project, and the Fadama project series. These initiatives provided improved inputs, training, infrastructure, and market access to over 1.7 million

farmers and agro-processors across Nigeria. The Fadama III project (2009-2019) was particularly significant, reaching many beneficiaries with matching grants, capacity building, and rural infrastructure development. The objective of The National FADAMA Development Projects (NFDP) was to increase the incomes of the farmers, reduce rural poverty, increase food security, and contribute to the development of the Millennium Development Goals. Other phases of the project focused on aggregating and processing for marketing. The World Bank collaborated with federal and state governments, local authorities, community associations, NGOs, and private sector partners, like Cargill and Dangote, who keyed into the program by establishing farms and processing plants as up-takers.

**The International Fertilizer Development Centre (IFDC)** has implemented various initiatives in Nigeria that indirectly address labor issues in the horticultural and agricultural sectors. Key programs include the Fertilizer Sector Improvement Program (FSIP), which strengthened the fertilizer value chain through training and promoting soil testing. IFDC's Integrated Soil Fertility Management (ISFM) Outreach and Fertilizer Deep Placement (FDP) Technology initiatives promote sustainable intensification practices, reducing labor burdens and improving efficiency.

The Horticultural Input Supply Chain Strengthening program facilitated input access for farmers and created employment opportunities for agro-dealers. While not directly targeting labor concerns, it has also partnered with the HortiNigeria program (2021-2025), funded by the Embassy of the Kingdom of the Netherlands (EKN) in Nigeria, which aims to facilitate the development of a sustainable and inclusive horticulture sector in Nigeria.

**The African Agricultural Technology Foundation (AATF)** operates in Nigeria to support the agricultural and horticultural sectors by providing smallholder farmers with access to innovative technologies and practices. AATF's programs in Nigeria focus on enhancing crop productivity, improving food security, and increasing farmers' incomes. Some of the key initiatives implemented by AATF in Nigeria include the introduction of improved crop varieties, such as insect-resistant cowpea and nitrogen-use efficient maize, as well as the promotion of mechanization and irrigation technologies. AATF also facilitates partnerships between farmers, researchers, and private sector actors to develop and disseminate new agricultural innovations. While AATF's primary focus is on technology transfer and adoption, the organization recognizes the importance of fair labor practices in agriculture.

# CHAPTER 3: HORTICULTURE SECTOR IN NIGERIA

## 3.1. OVERVIEW OF NIGERIA'S HORTICULTURE SECTOR

Nigeria has huge agricultural potential. The country owns about 36,872 thousand hectares of arable land suitable for cultivating various crops. The varied agro-ecological zones, ranging from the forests in the South to the extensive savanna woodland and

grassland in the North provide suitable and edaphic conditions for the production of an array of both local (indigenous) and exotic/adapted tropical horticultural crops. Table 3.1 shows common and popular Horticultural crops (fruits, vegetables, flowers, and ornamental plants) grown in Nigeria.

**Table 3.1: Some common horticultural sectors**

| FRUITS   | VEGETABLES   | FLOWERS   |
|--|--|---|
| Citrus - sweet orange, grapes, lime, lemon, sour orange etc.<br>- Pineapple<br>- Mango<br>- Guava<br>- Pawpaw/papaya<br>- Banana/plantain<br>- Sour sop<br>- Grapevine<br>- Passion fruit<br>- Cashew apple fruit<br>- Irvengia (ogbono)<br>- African breadfruit<br>- African star apple<br>- Date palm<br>- African pear<br>- Iyeye<br>- Baobab<br>- Mulberry<br>- Walnut<br>Etc. | - Tomato<br>- Onion<br>- Peppers<br>- Amaranths<br>- Celosia spp<br>- Melons (water, egusi)<br>- Okra<br>- Fluted pumpkin<br>- <i>Cochorus alitorus</i> (Ewedu)<br>- <i>Genetum Africanum</i><br>- Solanum spp<br>- Baobab leaves<br>- Roselle<br>- Water leaf<br>- <i>Ocinum gratissimum</i><br>- Egg Plant<br>- Cabbage<br>- Cucumber<br>- Carrot<br>- Lettuce<br>- Spinach<br>Sesame seeds (Black white, black)<br>Etc.<br><br>OTHERS<br>- Hibiscus and Sunflower | Ornamental Orchids<br>- Angroecum (manso, Burren)<br>- Bobobylom spp<br>- Cytochis Spp. Etc<br>Indigenous Ornamental plant<br>Asparacuspubescentis<br>Anerphalosdracotoidescostus (englariane, tacannstanus)<br>Grinum (ornation, jagus)<br>Dxaceneaaborea.<br>Encephallature bacteria<br>Ficuslyrata<br>Lilies Spp<br>FeperomiaSpp<br>RectophyllumSpp<br>Ferns<br>- Asplenium rudus.<br>- Polypodium spp<br>- Nephroleptis bisserate<br>- AdiantumSpp<br>- Turf grass<br>- Cynodondactylen<br>Cut Flowers<br>- Rose<br>- Chrysanthemum<br>- Tulip<br>- Carnations<br>- Aster<br>- Bird of Paradise<br>- Orchid<br>- Lily of the Valley, etc. |

Source: Adapted from Orisajo et al., 2021



Overall, the horticulture sector is largely predominant in the northern and middle belts of the country, particularly in the states of Kano, Kaduna, Sokoto, and Jos, where mainly small-scale farmers cultivate vegetables such as tomatoes, onions, peppers, and cabbages often with irrigation in open field production systems. There are also medium to high-tech farms located in the Southwest (Oyo, Ogun, Lagos, Ekiti, Ondo, and Osun) and around larger metropolitan areas such as Lagos, Abuja, and Port Harcourt. Smallholder farmers, farmer groups/cooperatives, and mostly small to medium-scale productions, who primarily rely on traditional farming practices and account for almost 90% of the total food production dominate the sector. Farmers mostly rely on low-cost and risk-averse inputs and practices due to their limited capacity to invest and the vulnerability to shocks that characterize the sector.

There are, however, few patchy large plantations in the sector.

**Key Vegetables:** Nigeria is the world's fifth-largest producer of vegetables, making it an agricultural giant in Africa (FAO, 2020). The most common vegetables produced are Sesame, tomato, pepper, okra, and onions (FAO, 2021). Smallholder or marginal farmers who often grow them on farms under 1- 4 ha largely make the production of these vegetables. Common vegetables produced ranging from 1-9M tonnes included tomatoes, okra, onions, and chilies in 2021, for example (see Table 3.2). Vegetables mainly thrive in the northern savannas, plateau regions, and southern rainforests with Kaduna, Kano, and Sokoto, amongst the three most important states for the production of tomato, onion, and pepper in Nigeria.

**Table 3.2: Common vegetables produced in 2020-2021 (in tonnes)**

| VEGETABLES         | 2020       | 2021       |
|--------------------|------------|------------|
| Chilies and pepper | 757548.63  | 759133.99  |
| Onions             | 1391433.57 | 1378493.83 |
| Tomatoes           | 357968.23  | 357968.23  |
| Okra               | 1871075.57 | 1917406.63 |

Source: computed from FAOSTAT 2022

**Key Fruits:** Nigeria is the world's eighth-largest producer of fruits (FAO, 2020). The most common fruits produced are mango, pineapple, and citrus (such as oranges) (FAO, 2021). Smallholder or marginal farmers who often grow them on farms under 1- 4 ha largely undertake this production of fresh produce. For instance, in 2021, pineapple, citrus, and mangoes were

some of the commonly produced fruits (ranging from 1-9M tonnes) (see Table 3.3). There is a difference in crop mix and area cultivated across the major agroecological zones. Fruit cultivation is more common in the humid southwestern regions and drier northern savannas. For instance, Benue and Kogi state are key producers of citrus fruits like oranges and tangerines.

**Table 3.3: Common fruits produced in 2020-2021 (in tonnes)**

| FRUITS              | 2020       | 2021       |
|---------------------|------------|------------|
| Other citrus fruits | 4102854.73 | 4112301.47 |
| Pineapple           | 1548590    | 1541979.75 |
| Mangoes, guavas     | 925236.37  | 927146     |

Source: computed from FAOSTAT 2022

**Other key inputs** for horticulture in Nigeria

**Seeds:** The Nigerian seed sector has been characterized by a lack of coordinated national policy until recently, leading to the development of a targeted Seed Roadmap.<sup>39</sup> Farmers access seeds through formal and informal systems with both public and private sector actors involved in seed production and distribution.<sup>39</sup> The National Agricultural Seed Council (NASC) is the federal government agency responsible for seed production and ensuring affordable access to quality seeds for farmers. State-level actors also participate in the formal production and distribution of seeds. Under the formal system, the public seed sector constitutes 87%, with farmers and registered companies obtaining their seeds from NASC and the National Horticultural Research Institute (NIHORT). However, there is limited information available on the unionization status of workers in these organizations or their involvement in labor rights issues. Interviews with farmers and stakeholders suggest diversion and sales of some of the free seeds from the federal and state governments sometimes without the authorities' knowledge, which has implications for labor rights and working conditions in the seed distribution process. For instance, the unauthorized sale of seeds and the politicization of seed distribution have contributed to instances of exploitation of workers (workers involved in the distribution process may not receive fair compensation for their labor), unequal access to benefits, and inadequate protection for whistleblowers.<sup>40</sup>

Seed sector reform in Nigeria has led to the development of seed companies. However, the private sector only constitutes 13% of variety releases in the seed market.<sup>41</sup> Imported seeds are affected by inflation, leading to higher prices for farmers and producers.<sup>42</sup> Since COVID, there have been efforts to create locally adaptive seeds.<sup>43</sup> Pilot outgrower schemes for companies to provide seeds for farmers have been piloted but farmers still struggle.<sup>44</sup> There are agro-dealers and private companies. Available data indicates there are 157 registered seed companies in Nigeria. These include Syngenta, Advanta Seeds, East-West Seed (Kaduna), Afri Agri Products Ltd, Maslaha Seeds, Jakan Farm, and Premier which supply hybrid seeds for

vegetables, and fruits among others to commercial farms.<sup>45</sup> These seed companies work with informal distribution channels and cooperatives. The majority of workers in these informal networks do not belong to unions but the cooperatives provide platforms for supplying the seeds to farmers and distributors.

Farmers also get seeds through projects from multi-national agencies and development partners such as USAID and IFAD the Embassy of the Kingdom of the Netherlands (EKN) and SNV working with consortium partners such as the International Fertilizer Development Centre (IFDC), East-West Seed Knowledge Transfer (EWS-KT). Common examples include:

- Collaborative Seed Program (CSP), between Nigeria and the Netherlands. Seeds for Change (S4C) project in Kano, implemented by the Netherlands-African Business Council (NABC) and six Dutch companies namely East-West Seed (supplying vegetable seeds), Syngenta (seeds and crop protection), Rijk Zwaan (supplying hybrid vegetable seeds), Enza Zaden (vegetable seeds), Bakker Brothers and Koppert which specialize in biological protection and soil-enhancing products.
- Transforming Nigeria's Vegetable Markets project in Kaduna and Kano, part of the Sustainable Development Goal Partnership Facility, implemented by East-West Seed Knowledge Transfer (EWS-KT), in collaboration with Wageningen University & Research (WUR) and several other partners.
- 2SCALE program by the Netherlands Enterprise Agency.
- The Nigeria-Netherlands Seed Partnership (NNSP) brings together all seed sector development projects funded by the Dutch government in Nigeria.
- Seed Project at IITA by the USAID.

Outside the formal supply systems, farmers also use informal sources/ systems to source seeds.<sup>46</sup> In this case, farmers save seeds and planting materials from

<sup>39</sup>Interview Horticulture Society of Nigeria

<sup>40</sup>Interview with the president of the Tomato Association

<sup>41</sup><https://www.accesstoseeds.org/index/western-central-africa/country-profile/nigeria/#:~:text=Seed%20sector%20in%20Nigeria%3A&text=The%20private%20sector%20now%20constitutes,sector%20constituting%20the%20remaining%2087%25.>

<sup>42</sup>FGD with FMARD

<sup>43</sup>FGD with FMARD; interview with UZZI Farmhouse

<sup>44</sup>FGD with FMARD; interview with UZZI Farmhouse

<sup>45</sup>Interview with Banana Farmer in Kano; FGD with FMARD; Interview with Horticulture Society in Ibadan

<sup>46</sup>Interview with Banana Farmer in Kano; FGD with workers in Kaduna; Interview with Horticulture Society in Ibadan

their crops, collect seeds from neighbor's seed stands or high-performing trees, and purchase seeds and planting materials from non-regulated local seed producers and traders.<sup>47</sup> The National Tomato Growers and Processors Association of Nigeria is now investing in seedlings rather than seeds to address the challenges with quality.<sup>48</sup> Some smallholder farmers access uncertified seeds from local (rural) markets like Kano and Bodija Market and Mile 12 market, from farmer groups<sup>49</sup> and use their farm-saved seeds.<sup>50</sup> Overall, the main sources of seeds within the horticulture sector in Nigeria remain both formal and informal systems with both public and private sector actors involved in seed production and distribution. Regulating these seed sources would be critical for the growth and sustainability of the sector.

**Pesticides and Fertilizers:** pests are a significant issue in the horticulture sector in Nigeria. The main chemical inputs for the horticulture sector in Nigeria are fertilizers and pesticides. The pesticides include insecticides, herbicides, and weedicides. Farmers use pesticides to control weeds and protect their plants against pests and diseases. Research shows that more than 70% of vegetable farmers use insecticides for pest control. The cost of pesticides remains a key challenge to farmers, especially as many of these are mainly based on importation from outside the country. That said, anecdotal evidence indicates that most farmers have limited education on the proper use and application of chemicals, which can lead to rejection when they attempt to export beyond the borders of Nigeria.<sup>51</sup> There is thus the need to build farmers' capacity to use pesticides and improve care for plants using pesticides and insecticides.<sup>52</sup>

Aside from the use of pesticides, nearly all vegetable and fruit farmers use chemical fertilizers in their production. According to the FAO, most fruit and vegetable farmers use one form of inorganic fertilizer or the

other. For instance, the federal government through its policies such as the Tomato Policy provides inputs such as fertilizers to aid farmers in their activities.<sup>53</sup> Some of the common inorganic fertilizers in use in Nigeria include urea, phosphorus, potassium, and nitrogen (see Table 3.4). The use of these fertilizers has implications for food safety and the standards for international markets. Importantly, the impacts of the inappropriate use and application of these fertilizers on workers, concerning occupational health and safety as well as the environmental impacts, remain largely under-researched.<sup>54</sup> International development programs such as the HortiNigeria are training farmers, especially through EWS-KT to good fertilizer use and application. Sustaining these training programs for farmers on good fertilizer use and application through collaborations between trade unions, international NGOs/ development partners and CSOs could help address challenges with the inappropriate use and application of these fertilizers on workers in respect of occupational health and safety as well as the environmental impacts.

There is also, however, some evidence of politics of distribution and capture of government-subsidized inputs to politically connected farmers and even non-farmers.<sup>55</sup> Farmers and producers during interviews highlighted the lack of transparency in the distribution of state subsidies and support meant for farmers<sup>56</sup>; some averred that the subsidies do not reach the grassroots level and are often monopolized by middlemen.<sup>57</sup> It was continuously alluded that apart from the fact some farmers are often unaware of these subsidized inputs, overall government support does not reach those at the bottom, and even if it reaches them, out of 100%, they might get only 10-25%.<sup>58</sup> Collaboration between trade unions and interprofessional bodies within the private sector in the horticulture sector could increase advocacy and engagement with federal and state governments to ensure transparency in the distribution of subsidized inputs to farmers.

<sup>47</sup>IFGD with farmers in Kaduna; Interview with Horticulture Society in Ibadan

<sup>48</sup>Interview with the president of the Tomato Association

<sup>49</sup>FGD with workers in Kaduna

<sup>50</sup>Interviews with farmers in Kano; Interviews with Uzzi farms; Interviews with the National President, Tomato Association; Interviews with National Of Onions Producers, Processors And Marketers Association

<sup>51</sup>FGD with FMARD

<sup>52</sup>FGD with FMARD

<sup>53</sup>Interview with FMARD; Interview with NATAP

<sup>54</sup>Interview with FMARD; interview with NATAP.

<sup>55</sup>FGD with farmers in Kano; Interview with Banana Farmer in Kano

<sup>56</sup>Interview with Banana Farmer in Kano; Interview with the National President, Tomato Association; Interview with National Of Onions Producers, Processors And Marketers Association

<sup>57</sup>Interview with Banana Farmer in Kano; Interview with the National President, Tomato Association; Interview with National Of Onions Producers, Processors And Marketers Association

<sup>58</sup>Interview with the National President, of the Tomato Association; Interview with the National Of Onions Producers, Processors, And Marketers Association

**Table 3.4: Inorganic fertilizer use by nutrient for farming (thousand tonnes)**

| Year     | NITROGEN |       | PHOSPHORUS, AS P2O5 |       | POTASSIUM, AS K2O |       | TOTAL |       |
|----------|----------|-------|---------------------|-------|-------------------|-------|-------|-------|
|          | 2000     | 2020  | 2000                | 2020  | 2000              | 2020  | 2000  | 2020  |
| Quantity | 105.6    | 436.4 | 44.0                | 136.1 | 37.9              | 113.7 | 187.5 | 686.2 |

Source: FAO, 2021

#### Irrigation and greenhouse technology farming:

Nigeria's climate has necessitated the use of irrigation systems and practices as farmers need to adopt farming techniques that are resilient to poor rainfall patterns. Across the agroecological zones of Nigeria, the North (Kano, Kaduna, among others.) particularly uses irrigation. It is also critical for the production of vegetables like tomatoes, in some parts of the Middle Belt. Most of these irrigations are informal and farmer-led, mostly using drip, furrow, and springer systems. There are also basin irrigations (Kuomi in Hausa); ridged blocks of roughly 4x4 meters for cultivating tomatoes, onions, peppers, and cabbages both inside the basin as well as on the border ridges. There have also been attempts to establish large irrigation systems such as the Kano River Irrigation Scheme in the North that utilizes dams and canal flows for water sources. The Tiga Dam is the main source of water for the Kano irrigation scheme. The Gorge Dam in the northwest of Kano state (close to Makoda) also irrigates an estimated 10,000 ha. Equally, in the Kano area, authorities established the Hadejia Jama'are River Basin Development Authority in 1976 to coordinate various projects under the Hadejia Jama'are River basin. Hadejia - Jama'are River Basin Development Authority is one of the Agencies under the Federal Ministry of Water Resources. In Sokoto, there are two main dams and related irrigation schemes, the Bakalori and Goronyo dams. Under the World Bank TRIMMING project as part of the Kano River Irrigation scheme (at Kura) and Tiga, Challawa, and Ruwan Kanya rehabilitation all in Kano State and the Hadejia Valley Irrigation scheme, with the Hadejia Barrage rehabilitation in Jigawa State, the Bank supported the formations of local farmer cooperatives to support access to inputs and extension services. These cooperatives, including the Water Users Association and lobby groups such as the CAFÉ, can lobby the Irrigation authorities and FMARD for subsidies on inputs and services that would improve their value chains. These cooperatives are not affiliated with labor unions though.

There is also in existence of irrigated urban vegetable production, particularly in cities such as Lagos, Abuja, and Port Harcourt, where farmers increased the use of solar-powered irrigation pumps<sup>59</sup>, sprinklers, among others, and as well as cultivation with wastewater for irrigation during dry seasons. These urban farmers work as cooperatives and are informal. They do not have an affiliation with trade unions. Boosting urban irrigation with support to farmers to procure solar-powered irrigation pumps, and sprinklers, among others, and educating farmers on the harmful effects of over-application of inorganic fertilizers, pesticides, and untreated wastewater could be key to improving the contributions of the horticulture sector.

**Greenhouse:** Due to unfavorable weather conditions and susceptibility to pests and diseases, greenhouse technology has gained increasing traction in Nigeria's horticulture industry, enabling the production of high-value vegetables such as tomatoes, fruits, and flowers to a limited extent. These are primarily found in the urban areas (Lagos, but also other urban centers including Abuja, Port Harcourt, and Ibadan) and the North such as Kaduna, among others.<sup>60</sup> There has been an emergence of greenhouses for horticulture production among private sector producers such as Agricon, Safe Vegetable Farms, Nosak Farm, Babylon Farms, UZZI Farmhouse, and institutions such as Veggie Grow and FADEM Nigeria.<sup>61</sup> Many of these greenhouses were invested in by professionals originally starting in different industries who were attracted to agriculture by the size of the market and the desire to introduce better quality produce and/or established as part of a development program. Dizengoff Nigeria, for instance, introduced a complete greenhouse solution in the Nigerian market in 2013 comprising of the greenhouse structure, drip irrigation, quality seeds and inputs, training, agronomical support, and insurance. Also, international agencies and development agencies such as USAID, and the Dutch Embassy have introduced such systems.

<sup>59</sup>[https://pdf.usaid.gov/pdf\\_docs/PA00Z9P4.pdf](https://pdf.usaid.gov/pdf_docs/PA00Z9P4.pdf)

<sup>60</sup>FGD with FMARD

<sup>61</sup>Interview with UZZI Farmhouse

With crop yields of 5-10 times higher than open-field farming, crops commonly grown in Nigerian greenhouses include tomatoes, sweet peppers, cucumbers, lettuce as well as strawberries, and flowers like roses. The production of these crops occurs across climatic zones and with the expectation to contribute to improved producer incomes and provide employment. It is worth highlighting that most greenhouse farmers are however dependent on imported specialized inputs (seeds, fertilizer) of which availability and cost are not consistent and are negatively impacted by inflation and price volatilities.<sup>62</sup> Supporting the design and manufacturing of cost-effective indigenous greenhouses could contribute to reducing not only the dependence on imported systems but also to easy updates by smallholder farmers with limited financial capacities. Importantly, most greenhouse farmers operate on a small scale and have few workers who are mainly casual. These workers do not have links to trade unions.

### 3.2. IMPORTS, EXPORTS, AND FORMAL SUPPLY CHAINS

Nigeria, as a country, relies heavily on imports to augment domestic demands, and the horticulture sector is no exception. The latest data (2020-2022) estimates that the country imported less than a million metric tons of fruits and close to 10 million tons of vegetables. The key imported products are apples, grapes, oranges, onions, potatoes, tomatoes, and cabbage, mainly from South Africa, Europe, India, and Lebanon. Specifically, in 2021, Nigeria imported \$12.5 million in tropical fruits such as apples, grapes, and oranges. These imports were from Niger (\$7.62 million), China (\$3.24 million), the United Kingdom (\$1.19 million), Saudi Arabia (\$164k), and Lebanon (\$117k).<sup>63</sup>

The import value chain (fruits, vegetables, seeds) is formalized and regulated under the Federal Ministry of Agriculture and Rural Development and Federal Ministry of Finance, along with agencies like the Standards Organization of Nigeria and the National Agency for Food and Drug Administration and Control (NAFDAC), and the Nigeria Customs Service, working with freight forwarders, importers, and consolidation agents who arrange transportation from source markets.

Unlike the import value chain, exports from the horticulture sector in Nigeria remain low and sometimes informalized. West African neighboring countries like Ghana, Cameroon, Chad, and the Middle East (e.g., Saudi Arabia), are leading export destinations for Nigeria's fresh fruits and vegetables. It is worth reiterating that Nigeria's exports are undertaken through informal cross-border trade<sup>64</sup> and semi-formal exports, often due to food safety and quality issues, high transaction costs, operational challenges, and supply chain corruption, which affects prices and export processes.<sup>65</sup> Hence, building the capacity of producers of horticultural products on food safety and export quality standards, as well as on processes for formalizing exports, would improve the export potential of the country.

On the public institutional and formal front, the federal government is establishing crop processing zones across major producing states to reduce post-harvest losses and offering programs that can improve exports. For instance, the Federal Ministry of Agriculture and Rural Development has set targets to grow exports by 2025 and has put in place some strategies such as providing low-interest credit through the Central Bank of Nigeria (CBN) to large farms investing in export value chains, linking smallholder farmers to off-taker arrangements via processors like GB Foods, establishing agro-processing zones for export commodities<sup>66</sup>, as well as working with the Nigerian Export Promotion Council to provide financial aid and market information to farmers.<sup>67</sup> Increased advocacy through the private sector to increase investments in export value chains, financial aid to smallholder farmers via formalized resource-based contracts, and increased market information access to farmers via regulatory institutions and NGOs could improve the horticulture export capacity of Nigeria.

Private sector participation in the export of fruits and vegetables is increasing in Nigeria. Key exporters include AACE Foods (dried spices), Universal Quest Impex (fruits, nuts), and Asano Export Company (ginger, fruits). Double Trust exports cashew nuts, ginger, and sesame sourced from integrated company farms and contract growers. Others include Tomato Jos, Dangote Processing, Dangi Foods, and Dansa Holding Limited, among others. Some processors, mostly downstream, focus on value addition using innovative approaches (Table 3.5).

<sup>62</sup>Interview with TOPAN; FGD with FMARD; interview with UZZI Farmhouse

<sup>63</sup><https://oec.world/en/profile/bilateral-product/tropical-fruits/reporter/nga>

<sup>64</sup>Interview, President, Association of Onion Producers, Marketers and Exporters Association

<sup>65</sup>President, NAFTA

<sup>66</sup>FGD with FMARD; interview with Horticulture Society of Nigeria

<sup>67</sup>Interview with NEPC representatives

**Table 3.5: Produce/Processing by some selected companies in Nigeria.**

| NAME   | TYPE OF PRODUCE, PROCESSED AND EXPORTED  | MAIN MARKET DESTINATION                      | TOTAL FINISHED PRODUCTS (TONNES) | ASPECT OF VALUE CHAIN OPERATING      | TOTAL NUMBER EMPLOYED  | UNIONIZED                                |
|--|--|--|----------------------------------|--------------------------------------|--|--|
| Cubas Group (Star Tomato Paste)                                    | Tomato paste, concentrates and insecticides  | Local and International (EU and Middle East) | One million tonnes monthly       | Production, Processing, Exporting    | 2,500 (and 10000 indirect jobs)  | No                                       |
| Jos Tomato   | Tomatoes   | Local and international                      | About 2,000 tonnes monthly       | Production, Processing, Exporting    | Over 200 full/ contract workers, and a network of over 3,000 smallholder farmers | No                                       |
| Dangote  | Tomatoes and concentrates  | Local  | Non-functional                   | Production, Processing               |  | No                                       |
| ReelFruit  | Dried Mango, Dried Pineapple Dried Banana, Dried Coconut                                       | Local  | 800MT                            | Processing and distribution (Retail) | Over 80 employees (and over 50 women farmers)                                    | No                                       |
| Agricorp International   | Dried spices (ginger)  | Local and international                      | 5000MT                           | Processing                           | Over 100   | No                                       |
| Tiger Foods Limited  | Dried mango, Pineapple, coconut  | Local and international                      | n/a                              | Production and retailing             | 100 - 500 (contract and permanent)   | No                                       |
| AACE Food Processing   | Dried spices Concentrated juices made from mango, pineapple, pawpaw, orange, and fruit blends. | Local  | n/a                              | Production, Processing, exports      | n/a  | No                                       |
| Niyya Farms Group Limited (Niyya Farms and Drinks Company Limited) | Manufacture and distribute fruit juice: Oranges, guava, mangoes and passion fruits             | Local  | n/a                              | Production, Processing               | 50 - 400 employees (and many farmers/ farmer groups)                             | No, but part of NECA                     |
| GB foods Africa  | Tomato concentrate used for producing Gino Tomatoes Paste and Gino Tomato Pepper Onion Past    | Local and International                      | n/a                              | Processing                           | Over 1000 (engage over 5,000 small-holder farmers as out-growers).               | No, but have internal labor associations |

Though horticultural export is relatively minimal in Nigeria, the export-oriented supply chains are characterized by formal and informal practices, as commodity exporters or companies are mainly locally and sometimes internationally certified based on destination trade requirements (e.g., GLOBALG.A.P, BRC, HACCP, Nigeria Standards Authority) or use semi-informal means to export produce to key destinations in Europe, the Middle East, Asia, and neighboring African countries. In 2021, for instance, Nigeria exported \$77.2k in Tropical Fruits such as oranges, and pineapples, to main destinations like the United Kingdom (\$46.4k), Niger (\$23.2k), Japan (\$4.61k), Switzerland (\$1.49k), and Canada (\$1.36k).<sup>68</sup> It is worth stating that Nigeria has

also struggled to achieve its horticulture sector export capabilities due to limited access to critical European and American markets as a result of the inability of producers to meet export market standards, poor certification compliance, financing, and not matching supply capacities to demand, among others.<sup>69</sup>

Within the export-formal supply chains, there is also vertical coordination between smallholder farmers and a few exporting and processing companies. This is usually based on loose agreements in terms of produce and pricing, but in the form of input provision or involvement in the de-greening and harvesting processes by the buyers, and by providing technical

<sup>68</sup><https://oec.world/en/profile/bilateral-product/tropical-fruits/reporter/nga>

<sup>69</sup>Interview, NAFTA President

assistance to contract farmers meeting international quality standards and guarantee buyback from farmers at pre-agreed prices. Bigger private players in the exports of tomatoes, oranges, pineapple, and mangoes targeting overseas markets usually facilitate these arrangements. Interviews with stakeholders indicate that the contract terms of these input-based arrangements often favor buyers to the detriment of the farmers. For instance, private agribusiness ventures like Niyya Group provide smallholders with seeds, fertilizers, training, and buy-back guarantees for processed output.<sup>70</sup> While these businesses aim to support local vegetable production, there have been reports of farmers facing challenges in meeting the requirements of buyers and securing fair prices for their produce as well as the fairness of the revenue-sharing arrangements between these players in the value chain.

Though there is a limitation in the scope of contract farming in the Nigerian horticulture context, modern domestic chains such as SPAR, and retailers like Ebeano, and Justrite are slowly integrating local small farmers into contract farming models for a consistent supply of fruits and vegetables produce to their outlets. These contract farming models are now linking some farmer clusters to food processors exporters and markets to supply at pre-agreed rates based on volumes and quality needed. NGOs and other cooperatives support farmer cooperatives, AA Multi-purpose Cooperative society, and WACOT trading multi-trading career cooperatives engage in direct supply to modern retailers. Interventions like *HortiNigeria*, COLEACP, and Yield-Wise are also training and trying to connect fruit (mango) and vegetable farmers (tomatoes) farmers in some states to processors in other states via cooperatives to markets. The COLEACP through its Fit for Market program, for instance, is supporting SMEs in horticulture to meet market requirements, focusing on covering food safety, standardization, and certification as well as business requirements. It is worth stating, however, that there is sometimes informality in farm and market pricing, for out-growers or smaller farmers who are contracted by exporters or buyers via these contract models, and their arrangements/ contracts are often based on loose agreements, with limited to no binding contractual documentation, with implications

for the profitability of farmers and their workers. Consequently, formalizing relations among actors and reducing the depth of informality reduces the vulnerability of individual smallholder farmers and associations while improving the economic situation of farmers and other actors within the supply chain. Interventions aimed at connecting fruits and vegetable farmers in horticulture-dominant states to processors in other states via cooperatives to markets are critical to reducing losses and improving access to markets for farmers.

### 3.3. LOCAL, DOMESTIC, AND INFORMAL SUPPLY CHAINS IN NIGERIA

The horticulture trade in Nigeria involves complex formal and informal supply chains connecting smallholder farms concentrated in rural areas to urban consumption markets in cities like Lagos, Abuja, Port Harcourt, and Kano. Within this value chain, smallholders with just 1-2 hectares dominate production using family labor and minimal technology.<sup>71</sup> The majority of farmers (over 70%) produce exclusively for the local fresh market, selling their produce to market women who supply to end-consumers, though their prices tend to be lower and unpredictable<sup>72</sup> due to the lack of integrated chains to serve export or processing channels as well as other national and production-related reasons such as not meeting certification and regulation compliance. For instance, tomatoes produced in states like Kaduna and Kano are aggregated by middlemen who transport crops via trucks (often with no cooling facilities) via roads to large urban markets like Mile 12 in Lagos and Oyingbo market, where wholesalers sell to thousands of distributors, retailers, street vendors, and local processors.<sup>73</sup> Similarly, fruits such as mangoes, oranges, and bananas from farms in Nassarawa, Benue, and Oyo states are shipped in baskets (mainly by aggregators) using fleets of unrefrigerated trucks to markets in the north in states such as Kano, Kaduna, and Abuja.<sup>74</sup> The highly perishable nature of horticulture produce leads to massive post-harvest losses during multiple handling stages. Nigeria loses over 40% of tomatoes produced before consumption.<sup>75</sup>

As earlier indicated, aggregators dominate the local horticulture market, and post-harvest handling in this space is manual, with little sorting, grading, cold

<sup>70</sup>Interview, NAFTAN President

<sup>71</sup>Interview with Niyya farms; Interview with Mile Twelve Farmers Association;

<sup>72</sup>Interview with banana farmer in Kano; Interview with onion farmers association; interview with president, tomato producers' association; FGD with farmers

<sup>73</sup>Interview with the president of the Tomato Producers' Association

<sup>74</sup>Interview with the president of Horticulture Society of Nigeria; Interview with Banana farmer in Kano

<sup>75</sup>Interview with the president, tomato producers' association; Interview with Niyya farmers; FGD with FMARD

storage, or value-addition before the transportation of the produce. The aggregators, or middlemen, serve as intermediaries between farmers and diverse off-takers; for instance, in the mango sector, market intermediaries coordinate close to a third of farm-to-market transactions.<sup>76</sup> Rural aggregators assemble and transport unprocessed mixed crops by public transport or pickup trucks to urban wholesale markets. Wholesalers then sell to retailers and street food vendors in open-air markets or along roadsides. Lack of farmer collective power allows exploitation by such merchants through unfair weighing, and delayed payments among others, which eats away at farm profits. The presence of women remains relatively low beyond farmgate except in select processing activities like tomato drying or onion bagging.<sup>77</sup>

Due to the unavailability of formal pricing mechanisms within the local level supply chain, general pricing, and even within outgrow verbal contracts, farmgate prices remain unstable, driven by local supply-demand dynamics, the perishable nature of produce, and the activities of middlemen and aggregators. Produce tends to get too expensive by the time it reaches consumer markets because of corruption or extortion on the roads<sup>78</sup>, middlemen withholding and delaying sales until the commission fees meet their expectations, and other arbitrary fees along the supply chain that increase farmers' post-harvest losses and costs.<sup>79</sup>

**"So, at the end of the day, not only tomatoes. All horticultural products become extremely expensive by the time you deliver because of the corruption on the roads and middlemen's ridiculous commissions."<sup>80</sup>**

Also, seasonality affects pricing. For instance, seasonal price variations for tomatoes can range from ₦500 (US\$1.21) per traditional raffia basket in the dry season to ₦1,200 (US\$2.90) per basket in the wet season. A basket can contain 55 kg, but in reality, buyers often request farmers to 'top-up' their baskets with an additional 5 to 10 kg. Similar prices of mango are much higher, and buyers pay per piece: ₦300 (US\$0.73) per piece during the peak season but in the low season, prices can reach ₦3,500 (US\$8.48) a piece. However, the lack of a union or centralized association to negotiate to set prices for farmers limits producers' capacity to make favorable decisions on sales and market negotiations.

Apart from production, some processors are gradually developing and have merged into the local market for processed fruits and vegetables. Indeed, the expansion of processed fruit juice and tomato concentrates (or puree) in Nigeria, at the turn of the current millennium, aided the growth of the domestic market.<sup>81</sup> Over the years, the domestic market-oriented fruit and vegetable processing industry has expanded from drinks to dried products, among others, particularly due to different international and government interventions such as The Anchor Borrowers Program<sup>82</sup>, The Agro-Processing Productivity Enhancement and Livelihood Support (APPEALS) among others, with the domestic-oriented processing segment in the fruit juice and vegetable (tomato) market. Key examples are Tomato Jos, Dangote, Mystrose Limited, GB Foods, AACE Foods, and Simply Green Juices.

Despite the emergence of some formal and private actors, including processors like Tomato Jos, Dangote Tomato processing, and fruit processors like Frutta Juice and Reelfruit, structured trading in the horticulture sector remains limited<sup>83</sup>, with about 90% of fruits and vegetables estimated to pass through informal fragmented channels from farms and farming cooperatives to consumers currently.<sup>84</sup> This results from the lack of consistent quality supplies for export or organized retail.<sup>85</sup> Poor rural road networks hamper collection, the absence of integrated cold chains to packhouses, and the lack of compliance with international standards like GLOBALG.A.P also constrain formalization.<sup>86</sup> Given the above, it is critical to improve market information on the local pricing of horticulture products across states to farmers and aggregators via simple digital systems. It is also necessary to link producers to processors and improve processing capacities with investments, machinery, and financial aid. There is a need to support regulators to simplify processes for certification and standardization. Importantly, it is critical for sustained advocacy and lobbying of state and federal government by private sector bodies in the horticulture sector towards improving road networks in horticulture zones across states, provision of integrated cold chains to packhouses, and capacity development of both producers, processors, and regulators to engender compliance with international standards like GLOBALG.A.P to boost formalization of the sector.

<sup>76</sup>FGDs with farmers in Niyya Farms

<sup>77</sup>Interview with onion farmers association; Interview with tomato producers association

<sup>78</sup>Interview with the National President of Tomatoes.

<sup>79</sup>Interview with onion farmers association; Interview with tomato producers association

<sup>80</sup>FGDs with farmers in Niyya Farms

<sup>81</sup>Interview with the president of the Tomato Producers' Association

<sup>82</sup>FGD with FMARD

<sup>83</sup>Interview with the president of the horticulture society; FGD with FMARD

<sup>84</sup>Interview with Mile Twelve Farmers Association; Interview with the president, tomato producers' association; interview with all farmers association of Nigeria

<sup>85</sup>Interview Horticulture Society of Nigeria

<sup>86</sup>Interview Horticulture Society of Nigeria



# CHAPTER 4: ORGANIZATION IN THE HORTICULTURE SECTOR IN NIGERIA

## 4.1 IMPORTANCE OF HORTICULTURE SECTOR FOR NIGERIA: KEY PRODUCTS, TRADE FLOWS, AND EMPLOYMENT.

Horticulture, which includes the cultivation of fruits, vegetables, flowers, and ornamental plants, significantly contributes to the Nigerian economy through imports and exports, providing food security and nutrition while offering income opportunities for millions of smallholder farmers and value chain actors.<sup>87</sup> The sector has witnessed steady growth over the past decade. As of 2021, Nigeria's agricultural exports, including horticultural crops like fruits and vegetables, reached a total of USD 3.6 billion,<sup>88</sup> contributing to about 24% of the country's GDP.<sup>89</sup> The horticultural sector employs a considerable number of people and provides livelihoods for many rural communities, including an estimated 10 million Nigerians directly and indirectly.<sup>90</sup>

### 4.1.1 HORTICULTURAL EXPORTS:

#### FRUITS

**The key fruit exports in Nigeria include:**

**Citrus:** Citrus is one of the largest fruits in the sub-sector, with Nigeria being one of the leading orange producers in Africa. Nigeria produces various citrus fruits, including oranges, lemons, and grapefruits. Oranges are a significant crop produced in Nigeria, with

annual citrus output estimated at around 3.5 million metric tons currently. Major producing states are Kaduna, Nasarawa, Oyo, Osun, and Ekiti. Dangote Farms is one of the major industrial citrus producers, with 3,500 hectares of orange plantation. Apart from some informal semi-exports to neighboring countries, citrus consumption is local. This is because Nigerian oranges do not meet export standards due to their green color and small size. Both men and women equally dominate the citrus value chain. However, orange exports were about 118,000 MT to key destinations countries such as Germany, the Netherlands, and Poland MT(see Table 4.1. and 4.2)

**Pineapple:** Key destinations for pineapple exports from Nigeria are Switzerland, Niger, and Italy. Overall, exports showed significant expansion.

**Mango:** On average, mango production every year constitutes about 946,695 tonnes. In the mango value chain, women largely dominate the retail, processing, and packaging aspects.

**Pawpaw:** Pawpaw production accounts for 855,581 tonnes per year. Women largely undertake the aggregation of pawpaw from rural communities and sell it to consumers.

**Table 4.1: Export of Fruits in Nigeria**

| PRODUCE   | 2020-2021  |                  |                                  | 2022       |               |                                  |
|-----------|------------|------------------|----------------------------------|------------|---------------|----------------------------------|
|           | NET WEIGHT | VALUE (IN NAIRA) | TOP EXPORT DESTINATION COUNTRIES | NET WEIGHT | VALUE         | TOP EXPORT DESTINATION COUNTRIES |
| Mangoes   | -          | -                | -                                | -          | -             | -                                |
| Oranges   | 134,101    | 68,930,415.40    | Germany, Netherlands,            | 117,500    | 46,539,343.20 | Germany, Netherlands, Poland     |
| Pineapple | -          | -                | Switzerland and Niger, Italy     | -          | -             | -                                |

\*Exports statistics larger than production in the year under review probably based on statistical inaccuracies and reporting by NEPA, time lag factors, and re-exports

<sup>87</sup>FGD with FMARD

<sup>88</sup>UN COMTRADE, 2022

<sup>89</sup>NBS, 2020

<sup>90</sup>FGD with FMARD

<sup>91</sup>Horticulture Society of Nigeria

<sup>92</sup>FGD with farmers; Interview with the Horticulture Society of Nigeria

**Table 4.2: Key fruit export destination countries**

| PRODUCTS  | 1ST LEADING COUNTRY | VOLUME              | 2ND LEADING COUNTRY | VOLUME                  | 3RD LEADING COUNTRY | VOLUME                  |
|-----------|---------------------|---------------------|---------------------|-------------------------|---------------------|-------------------------|
| Oranges   | Germany             | 78200<br>(₦4817358) | Netherlands         | 26200<br>(₦14308500.70) | Poland              | 13100<br>(₦27413484.50) |
| Mangoes   |                     |                     |                     |                         |                     |                         |
| Pineapple | Switzerland         |                     | Niger               |                         | Italy               |                         |

### Vegetables

#### The key vegetable exports include:

**Tomatoes:** Tomatoes are one of Nigeria’s key horticultural export products by volume, with over 3.1 million MT produced in 2021.<sup>93</sup> Production is higher in the North (Kano, Kaduna, Sokoto, and Jos).

However, these are largely semi-formal exports to neighboring countries, with actual \$246k exported to countries such as Togo, Niger, and Ghana. Women dominate small-scale processing, packaging, and retail of fresh and processed tomatoes. In 2022, export to the USA was only 6145.56 MT (See Table 4.3 and 4.4).

**Table 4.3: Export of Vegetables in Nigeria**

| PRODUCE           | 2020-2021   |                  |   | 2022       |                |  |
|-------------------|-------------|------------------|---|------------|----------------|--|
|                   | NET WEIGHT  | VALUE (IN NAIRA) | TOP EXPORT DESTINATION COUNTRIES        | NET WEIGHT | VALUE          | TOP EXPORT DESTINATION COUNTRIES                   |
| Vegetables        |             |                  |   |            |                |  |
| Tomatoes          | -           | -                | Togo, Niger, and Ghana                  | 6145.56    | 3754130.033    | USA, and informal exports to Togo, Niger and Ghana |
| Onion and shallot | 15,961,000* | 644,068,229.98   | Côte d’Ivoire, Ghana, Niger             | 3816300    | 108,327,147    | Ghana  |
| Pepper            | 992,760     | 293,483,264.69   | Spain, South Korea, Italy, UAE, Germany | 1,942,700  | 266,572,416.46 | Mali, Niger, Ghana, Senegal, Italy, India          |
| Ginger            |             | \$64mn           | Germany and the United Arab Emirates    | -          | -              | -  |

**Table 4.4: Key vegetable export destination countries**

| PRODUCTS | 1ST LEADING COUNTRY | VOLUME                   | 2ND LEADING COUNTRY | VOLUME                    | 3RD LEADING COUNTRY | VOLUME                  |
|----------|---------------------|--------------------------|---------------------|---------------------------|---------------------|-------------------------|
| Onions   | Côte d’Ivoire       | 6500,000<br>(₦264820500) | Ghana               | 3816300<br>(₦108,327,147) | Niger               | 2756000<br>(₦110232779) |
| Pepper   | Ghana               | 520400<br>(₦27726571.6)  | Mali                | 441400<br>(₦50,417,563)   | Senegal             | (₦19557650))            |

<sup>93</sup>(FAO, 2022)

**Onions and shallots:** Onions are one of the most consumed vegetable crops in Nigeria. Production of onion in Nigeria is on the rise, with over 1.3 MT produced in 2021. Production is highest in the North (Kano, Kaduna, Sokoto, and Kebbi). The vegetable is available throughout the year, as farmers and upstream actors often use storage. The main destinations for Nigeria's onion exports are countries like Senegal, Côte d'Ivoire, Ghana, and the United Arab Emirates. Retailers are also often women. In 2021 and 22, key export destinations were Côte d'Ivoire, Ghana, Niger (see Table 4.3).

**Ginger<sup>94</sup>:** Actual exports for Nigerian ginger stand at \$64mn and the best destination markets with the greatest potential are Germany and the United Arab Emirates, though the United States, United Kingdom, and the Netherlands have potential. Exporters pack the fresh ginger in PVC cartons or corrugated fiber boxes with an inner lining of films while they pack the dried split ginger in a clean propylene woven bag.

**Sesame Seed:** The greatest potential for Nigeria's Sesamum seeds is in China, Japan, and Türkiye. China shows the largest absolute difference between potential and actual exports in value terms, leaving room to realize additional exports worth \$197 million. In Q1 2023, Nigeria's exportation of sesame seeds stood at N67.66 billion, accounting for 24% of the country's total agricultural exports within the reporting period.

#### 4.1.2 HORTICULTURAL IMPORTS

In 2021 and 2022, key fruit imports in Nigeria were mainly mangoes, oranges, and pawpaw, which were imported from China, the United Kingdom, and South Africa (see Table 4.5).

Over the years, major import countries for vegetables are Asia and Africa specifically countries such as China, India, Vietnam, and Cameroon, with few in Europe such as France and Italy (see Table 4.6).

**Table 4.5: Imports of horticultural produce (Fruits) to Nigeria**

| PRODUCE | 2020-2021  |                  |                            | 2022       |            |                       |
|---------|------------|------------------|----------------------------|------------|------------|-----------------------|
|         | NET WEIGHT | VALUE (IN NAIRA) | ORIGINATING COUNTRIES      | NET WEIGHT | VALUE      | ORIGINATING COUNTRIES |
| Mangoes | 20,655.64  | 32650,547        | China, South Africa, USA   | 8552.30    | 8,306,346  | China, United Kingdom |
| Oranges | 390,686.50 | 102,361,949      | South Africa, Italy, China | 262,290.40 | 79,794,953 | Morocco, South Africa |
| Pawpaw  | 2625       | 19,408,483       | India                      | -          | -          | -                     |

**Table 4.6: Imports of horticultural produce (vegetables) to Nigeria**

| PRODUCE           | 2020-2021    |                  |                                      | 2022          |               |  |
|-------------------|--------------|------------------|--------------------------------------|---------------|---------------|--|
|                   | NET WEIGHT   | VALUE (IN NAIRA) | ORIGINATING COUNTRIES                | NET WEIGHT    | VALUE         | ORIGINATING COUNTRIES                    |
| Tomatoes          | 18,375.97    | 11,065,427       | Italy, Cameroon                      | 25,095        | 3,598,902     | Cameroon, Ethiopia, China (concentrates) |
| Onion and Shallot | 1,741,431.36 | 1,616,563,039    | China, India, Egypt                  | 8,148,129.69  | 3,192,610,533 | China, India, Germany                    |
| Pepper            | 1545,255.39  | 2,396,323,142    | India, China, Vietnam, France, Ghana | 2,3388,286.11 | 2,156,313,557 | China, India, France, Vietnam            |

<sup>94</sup>The major ginger-producing states are Kaduna state, Nasarawa, Niger, Gombe, Bauchi, and Benue. <https://nepc.gov.ng/cms/wp-content/uploads/2023/05/CBI-Presentation.pdf>

#### 4.2.1 EMPLOYMENT TYPES, PRACTICES, AND DECENT WORK ISSUES

The study identified three main types of employment commonly practiced along the horticulture value chain in Nigeria, particularly from production to processing and even exports. The type of employment contracts or arrangements in the horticulture sector in Nigeria have their own labor and decent work challenges.

**Permanent Workers/Staff:** A limited number of permanent staff characterize Nigeria's horticultural sector. Recruitment of these types of staff is on a permanent basis and the workers enjoy a fixed tenure of employment and associated defined conditions of service. Within the horticulture sector, permanent staff are usually few and are mainly those who occupy technical positions within the value chains. Common permanent staff categories identified in this study included administrative, company and farm management, packhouse staff for companies such as Tomato Jos, Dangote, Dangi Foods, Dansa Holding Limited medium to large processors as well as, input and service supplier workers such as seed, agrochemicals and service companies such as East West, and Babban Gona. These staff, apart from their defined salaries, also enjoy medical insurance, accommodation (in some instances), and free feeding while at the production sites.<sup>95</sup> Supporting labor unions with skillsets and tools to organize unionized permanent staff of horticulture sector players would contribute to improving wage conditions and also collective bargaining within the sector.

**Contract farming and workers:** These are not direct employment but exist as contracts. The study identified three main types of contracts and seasonal working arrangements within the horticultural value chains in Nigeria.

**i. Informal verbal agreements:** One of the commonest contractual practices in the Nigerian horticultural sector is when smallholder farmers and buyers or aggregators make loose verbal agreements before the harvest. These agreements do not have any formal contracts that stipulate production volumes or pricing. Instead, they rely on relationships and trust. Smallholders in Nigeria usually make arrangements with aggregators to sell their produce

post-harvest. However, misunderstandings often occur over pricing expectations, quality standards, and delivery reliability. In some cases, farmers end up selling to the highest bidder, breaching initial commitments. Similarly, buyers may back out of their agreements when market prices fluctuate, and their ready marketers become problematic.<sup>96</sup> This situation offers flexibility to smallholders, who can mobilize temporary labor from their families or communities to meet expected demand peaks. However, such casual work arrangements that lack formalization also result in job insecurity. The prevalence of informal verbal deals thus intensifies the precariousness of livelihoods for Nigerian smallholder horticulture farmers and laborers within an unstructured value chain, as they are often taken advantage of by many aggregators.<sup>97</sup> To address these gaps, it is critical to strengthen collaboration between international development partners and labor unions in the horticulture sector to organize horticulture sector workers of this contract type would help improve income/wages and working conditions. It is also necessary for them to support the training of smallholder farmers to enable the establishment of simple but enforceable contracts with off-takers and aggregators and contribute to improved work conditions.

**ii. Informal verbal agreement with resource commitment:** In Nigeria, this type of contract is common in the vegetable sector often entered between producers/ small-scale farmers and buyers (i.e. Traders, companies, or aggregators. Here, contracted farmers get inputs or financial support from off-takers for a guaranteed supply of fresh products at a pre-determined price, which the farmers usually pay in kind if a trader pre-financed their production. Such arrangements have often resulted in them insisting on being the sole buyers of their products, which the aggregators sometimes buy at below-market rates, making it unprofitable for farmers, especially as they mostly hire additional laborers for the season to meet targets. This also impacts the working conditions of farmers or casual employees altogether (see Chapter 5). There have been cases of small-scale farmers who have informal agreements with produce buyers sometimes selling their products to other buyers who offer better prices, even if they have received

<sup>95</sup>FGD with Horticulture Farmers )(Farmers Service Centre Shika, Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA; FGD With Horticulture Farmers Kura LGA, Kano State; interview with national president of banana and plantain association; interview with national president of tomato producers association; FGD with Horticulture farmers; FGD with NIYYA farms.

<sup>96</sup>Interview, Agri-business and farm owner, Lagos.

<sup>97</sup>Interview, Agri-business and farm owner, Lagos

support from their original buyers in the form of inputs and extension services.<sup>98</sup> This usually happens when market prices increase beyond the initially agreed prices with their financiers. As explained as one of the challenges affecting farmers due to their inability to find markets and negotiate pricing, organizations like SNV, Transfer (EWS KT), SNV, TechnoServe, USAID, GIZ, and agribusiness associations and NGOs have introduced interventions training Nigerian smallholder out-growers and cooperatives on record-keeping, marketing, fertilizer application, and pricing models to enhance negotiating capacity regarding contract farming arrangements and market access for contract farmers in the vegetable value chains in Oyo, Kaduna, Ogun, and Kano states.<sup>99</sup> Concerning workers with this contract type, it is critical to strengthen collaboration between international development partners and labor unions in the horticulture sector to organize horticulture sector workers of this contract type would help improve income/wages and working conditions. It is also necessary for them to support the training of smallholder farmers and farmer cooperatives to enable the establishment of simple but enforceable contracts with off-takers and aggregators and contribute to improved work conditions. Importantly, labor unions, working with service providers can support the training of farmers on proper application of inputs and proper book and record keeping on the use of chemicals in their production.

- iii. **Workers and Farmers in 'Resource-providing contracts' arrangements:** In Nigeria, this form of contract exists in two ways; either farmers are directly contracted by large processing companies such as Dangote Tomato Processing Company or Jos Tomato or (ii) contracted through cooperatives and programs such as Anchor Borrower Program (ABP).<sup>100</sup> In both however, they obtain planting material, chemical inputs, other production tools, and technical support on credit from the contracting company, and either hire farmers or a group of farmers to work as part of their (commercial) plantation or lease out land for farmers to produce a specified group. Farmers in this arrangement agree to adhere to precise production methods and input regimes. Farmers pay back the credit through a share of the

harvest and the commitment to sell to the contracting company. This form of contract was popular in the vegetable sectors compared to the fruit areas. For instance, interlocutors established that companies such as Dangote Processing and Jos Tomato adopted fixed contact mechanisms such as inputs, an agreed price and while farmers invested and cultivated high-quality produce. Within these systems or arrangements, companies usually lay off temporary staff after production ends. Similarly, companies also let go of technical persons contracted to assist in coordinating the entire production process, from land preparation to harvesting, after the export season. This arrangement is mutually beneficial for both the farmers and the processing companies. The exporter receives a guaranteed supply of fresh produce such as tomatoes, pineapples, or mangoes at a predetermined price that makes processing competitive with imported processed products. The exporters also provide farmers, on the other hand, with a fixed price that reduces uncertainty and enables them to make production decisions based on the price. FGDs with farmers show that the majority of smallholder farmers on this contract type do not belong to labor unions. Some however belong to farmer cooperatives which cannot bargain for better conditions or negotiate on their behalf. The seasonality of production contributes to the precariousness of employment for workers with this type of contract. To reduce workers' vulnerability, trade unions, collaborating with international development organizations and service providers can support the training of farmers on the proper application of inputs and proper book and record keeping on the use of chemicals in their production. They can also support the organization of formal and informal sector horticulture sector workers, facilitate their representation in negotiations with employers/producers, and establish CBAs.

**By-day laborers/ Casuals:** This level of employment was the highest among the three categories. More than 50% of the casual workforce are often laborers employed to take part in farming, harvesting, sorting, and other activities when e required, and there are mainly no contractual obligations beyond the payment of wages after the delivery of services. There are

<sup>98</sup>FG Interview, President, Onion Growers Association.

<sup>99</sup>Interview, Netherland Embassy, Nigeria

<sup>100</sup>FGD with FMARD

different forms of casuals. For the large companies that engage in processing, sorting, and packaging of fruits and vegetables, most casuals, mainly women, are employed for an average period of five months and made redundant thereafter to comply with the requirements of the labor law. Usually, these employers recall most of the released casual staff to begin another cycle of work if they need their services on the farm or in the company.

Interviews and FGDs with laborers show that the majority of casual laborers on farms undertake the weeding of farms, pruning of trees, transplanting of vegetables, application of fertilizers and pesticides, as well as harvesting of fruits and vegetables. However, in recent times, there has been a shortage of casual labor, particularly in vegetable farming.

#### **4.2.2 GENDERED ROLES AND EMPLOYMENT RISKS: MEN DOMINATE WOMEN.**

In Nigeria, there is evidence of gendered roles, gendered differentials in pay, and discrimination, among others as found in this study.

**Gendered roles:** Across the value chain, women form the majority of the entire labor force, particularly in vegetable production, a bit less in fruit cultivation due to the labor intensiveness of fruit production or farming activity. Women constitute the majority (over 70%) of the labor force in the production unit or level and the aggregation level. The study could not establish across the board if men occupied the high-earning echelon of the value chain as out-growers. However, the study observed that more women were gradually occupying and working in senior management positions in the sector (e.g., a woman founded AACE Foods), and they equally secured positions as permanent staff. Within the brigade of casual laborers, men are engaged in weeding, pruning, and application of inputs, and pesticides. These more difficult activities attract better remuneration than the watering, harvesting, and sorting roles, undertaken mainly by women. However, in vegetable production, the majority of the casual laborers are women, often undertaking work such as planting, and harvesting, among others.

#### **Contracts and off-taker schemes favor men and women, but women are more preferred:**

Despite socio-cultural barriers that restrict the participation of women in production and land ownership, women are working in the tomato value chain from production to the market, even in Kano. The majority of the women are engaged in the marketing of tomatoes and onions. However, women also work in greenhouses owned by private companies such as Dizengoff, Wells Hosa Greenhouse Farms Limited, etc., where women's labor is preferred to produce tomato seedlings for farmers, and as a result, 80% of the workforce is female.<sup>101</sup> It was explained that women are perceived to be gentler than men when handling delicate vegetables; therefore, the agro-processing industry prefers them.<sup>102</sup> For instance, large processors such as Jos Tomatoes will prefer to have women out growers who will be given land and inputs and directed on production practices.<sup>103</sup>

Despite this greenlight, women farmers in the horticulture sector in performing their various on-farm and off-farm activities sometimes have their skills curtailed or hampered by several socio-economic constraints and issues creating a perceptible gender gap. For instance, (rural) women's labor-intensive work as caregivers and housekeepers, difficulty in owning or accessing land as well as inadequate training, and the labor-intensive nature of some work often prevent them from responding to some opportunities within the horticultural value chain.<sup>104</sup> This re-creates the vicious cycle of women being neglected and within the horticultural chain, with men getting the opportunities at the expense of women, often because most women in the rural areas engaging in smallholder farming lack the resources (including land and capital) to take advantage of opportunities presented by contract farming or schemes such as farm ownerships, the provision of raw materials, training, application of chemicals among others. Given the increased preference for women as casual laborers in several aspects of the horticulture value chain, service providers and international partners must target them with training on OSHE and Gender-based violence and harassment to further the protection of women and vulnerable groups. There is also the need to create gender-responsive and gender-sensitive referral pathways in cases of abuse and harassment. It is critical to train women farmers and laborers on record keeping and proper application of inputs.

<sup>101</sup>Interview with UZZI farms.

<sup>102</sup>Interview with the president, of the Tomato Producers' Association

<sup>103</sup>Interview, Tomato Jos

<sup>104</sup>Interview with a Banana farmer in Kano

# CHAPTER 5: LABOR RIGHTS AND REGULATIONS IN NIGERIA

## 5.1. LEGISLATIVE AND INSTITUTIONAL FRAMEWORK FOR THE PROTECTION OF WORKERS' RIGHTS IN NIGERIA

A plethora of laws govern and regulate employment relationships in Nigeria. These include the 1999 Constitution of Nigeria, the 2023 Labor Act, and several laws enacted by the National Assembly and House of Assembly relating to labor and employment, pensions, and workplace compensation. Additionally, Nigeria has ratified international conventions, treaties, and protocols, including the Forced Labor Convention (No. 29), Freedom of Association and Protection of the Right to Organize Convention (No.89), the Right to Organize and Collective Bargaining Convention (No. 98), and Tripartite Consultation (International Labor Standard; No.144).<sup>105</sup>

The Labor Act of Nigeria makes a distinction between “workers” and “non-workers.” ‘Workers,’ according to the Act, are employees who perform manual labor or clerical duties while “non-workers” refer to employees who perform administrative, executive, technical, or professional functions. The Act applies only to workers as defined above and regulates the employment of persons in Nigeria including the prescription of minimum terms and conditions of employment. The terms and conditions of employment of “non-workers” are primarily subject to the terms of their respective contracts of employment. Other laws (e.g., the Pensions and Workmen Compensation laws), however, do not make a distinction between distinct categories of employees and therefore presumed to apply to all workers in Nigeria.

The Trade Unions Act, Chapter T14, Laws of the Federation of Nigeria 2004 (as amended) (the “TUA”) primarily governs the activities of trade unions in Nigeria. It recognizes registered trade unions as obligatory for an employer. Trade unions in Nigeria have the right to (i) negotiate the terms and conditions of employment with employers on behalf of employees who are members of the unions; (ii) embark on industrial strike action; and (iii) engage in peaceful picketing. With regard to collective bargaining, the TUA provides that all registered trade unions with members in the

employment of an employer shall constitute an electoral college and elect members who will represent their unions in negotiations with the employer.<sup>106</sup>

There are two main trade union federations in Nigeria with affiliate national unions- the Nigeria Labor Congress (NLC), and the Trade Union Congress (TUC). The National Union of Agriculture and Allied Employees (NUAAE) is affiliated with the NLC, whereas the Food, Beverage, and Tobacco Senior Staff Association (FOBTOB) is affiliated with the TUC. Agriculture, including horticulture, is highly informal in Nigeria and has low representation of trade unions. Thus, employees of the federal and state governments mainly participate in the activities of the agriculture, food, and beverages unions. Most horticultural farmers operate in the informal sector and organize into local and national associations and area-based cooperatives as discussed in the preceding chapters.

The National Industrial Court of Nigeria (“NICN”) is vested with original exclusive authority in respect of all labor and employment matters in Nigeria. The NICN (Civil Procedures) Rules 2017 allows employers to settle claims at any time before or after their initiation until the delivery of the final judgment of the court.<sup>107</sup>

## 5.2. WAGES, BENEFITS, AND THE WORKING CONDITIONS OF THE HORTICULTURE SECTOR

The National Minimum Wage Act of Nigeria (2019) provides the framework for minimum wage fixing in Nigeria. The Act does not cover part-time workers; commission or piece rate workers; businesses employing under 25 people; seasonal workers; or those employed in aviation or merchant shipping. It establishes a tripartite committee to make recommendations and review the minimum wage. The minimum wage in Nigeria (effective September 2023) is NGN35,000.00 (€42) per month.<sup>108</sup>

Laborers in the horticulture farms in the informal sector earn between NGN5000 and NGN7000 (€6-8.4) monthly or N1500 (€1.50) daily. Not only is the wage/salary low but workers bemoaned irregular and late

<sup>105</sup>Ratifications of ILO conventions: Ratifications for Nigeria

<sup>106</sup>Interview with trade union executive.

<sup>107</sup>Employment & Labor Laws and Regulations Report 2023 Nigeria (iclg.com)

<sup>108</sup>Interview with trade union leader at the Trade Union Congress (TUC) of Nigeria

payment of wages.<sup>109</sup> They reported that payment sometimes depended on sales of produce and workers who complained risk not being re-engaged.<sup>110</sup> Due to the seasonality of the sub-sector, farm laborers reported their incomes were also seasonal, making them move between employed and unemployed status during the year.<sup>111</sup>

“This work is not permanent. It is seasonal; so, when it is not a farming season, we become jobless. It is easy to find a job during planting season. But we struggle when the season passes.”<sup>112</sup>

“One of the challenges I face is the issue of payment. Some of the farmers do not appreciate us. We spend most of our time on their farm and they pay us less. No water, no food, nothing.”<sup>113</sup>

“Young people are not interested in working on farms because of the low pay and stress. We do not have any group or union that speaks for us when we feel cheated,”<sup>114</sup> stated a farm laborer.

“Most times these farm owners do not care about those working for them...no benefits when we work hard, and they don’t pay us on time.”<sup>115</sup>

Farm owners also bemoaned inadequate income due to high production and transportation costs. The presence of middle people monopolizing the sector and, the lack of standardized mechanisms for pricing affect working hours and farmers’ income.<sup>117</sup> Others complained about limited access to the market and lack of storage facilities leading to gluts given the perishability of their products.<sup>118</sup> Such situations sometimes compel them to sell their products at lower prices to middlemen who then store and sell when prices are higher.<sup>119</sup> Some farmers also reported theft and insecurity of their items.<sup>120</sup>

“Some people come and pose as middlemen with money to buy our produce only to take them, sell and run away with our money”.

“Price fluctuations affect the buyer sometimes. The price you buy may be higher than what the market offers. And sometimes the farmers perceived it as if is the intermediaries that are inflicting the prices.”<sup>121</sup>

The 2023 Labor Act recognizes that an employment contract could be a written document or oral, express, or implied. Section 7 mandates employers to issue contracts to workers within three months of commencement. The Act also prescribes the minimum terms and conditions that employers must comply with in relation to workers. These include a written statement outlining details of employment such as;

- nature of employment, appropriate notice period.
- the rates of wages and calculation thereof.
- periodicity of payment of wages, terms, and conditions relating to hours of work.
- holiday and holiday pay.
- sick leave requirement and any provision for sick pay, and
- twelve weeks maternity leave for female workers to be enjoyed six weeks before and six weeks after confinement. This was increased to 16 weeks in 2018 for female workers of the federal government.

These minimum working conditions are the preserve of workers in medium to large-formal enterprises. For most workers in the informal sector, contracts are word of mouth or written but loosely enforced. Both employers and employees contacted spoke about violations of contracts.

<sup>109</sup>FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA; FGD With Horticulture Farmers Kura LGA, Kano State; interview with national president of banana and plantain association; interview with national president of tomato producers association; FGD with Horticulture farmers; FGD with NIYYA farms.

<sup>110</sup>Interview with the national president of the banana and plantain association; interview with the national president of tomato producers’ association; FGD with Horticulture farmers; FGD with NIYYA farms.

<sup>111</sup>Interview with the national president of the Banana and Plantain Association; interview with the national president of the Tomato Producers Association; interview with the president of the Onion Producers Association; interview with the president of the Horticulture Society of Nigeria.

<sup>112</sup>FGD with farmers in NIYYA farms

<sup>113</sup>FGD with farmers from NIYYA farms

<sup>114</sup>FGD with farmers from NIYYA farms

<sup>115</sup>Interview with farmers.

<sup>116</sup>interview with the national president of the Banana and Plantain Association; interview with the national president of the Tomato Producers’ Association; interview with the president of the Onion Producers’ Association; interview with the president of the Horticulture Society of Nigeria.

<sup>117</sup>FGD with farm owners of NIYYA farms

<sup>118</sup>interview with the national president of the Banana and Plantain Association; interview with the national president of the Tomato Producers’ Association; interview with the president of the Onion Producers’ Association; interview with the president of the Horticulture Society of Nigeria; interview with a banana farm in Kano.

<sup>119</sup>interview with a banana farm in Kano; interview with the national president of the banana and plantain association; interview with the national president of the tomato producers’ association; interview with the president of the Onion producers’ association; interview with the president of the horticulture society of Nigeria.

<sup>120</sup>interview with a banana farm in Kano; FGD with farm owners of NIYYA farms; Interview with UZZI farms.

<sup>121</sup>FGD with middlemen



"I sign a contract with my laborers under the supervision of the police. This is to assure security for both the laborer and me as a female employer. The contract stipulates terms of work pay, working hours, and assurance of medical care in case of sickness as well as of the laborer's next of kin. Most of our workers have no formal education."

"Most of them will sign a contract for one year but leave without notice before the end of the contract."<sup>122</sup>

Although the Act does not provide for paternity leave, the Federal Government in 2022 granted fourteen days paternity leave to men in the federal civil service.<sup>123</sup> Before this, some state governments (Enugu and Lagos States), offered paternity leave to male employees. The paternity leave in Enugu State is for three weeks, while that of Lagos State is for two weeks and only applies with respect to the first two children of such male employees.

Most farm workers reached reported average daily working hours of three to ten hours depending on the tasks.<sup>124</sup> This is, however, three hours less (on average) for farmers who have mechanized their farming.<sup>125</sup> Although most of them cannot afford to own these machines or equipment, they are sometimes able to hire them on a daily or weekly basis.<sup>126</sup> Some farmers reported sleeping on their farms depending on the size of the farm and the task at hand. Respondents identified security as a great challenge to most farmers in Nigeria, citing the operations of armed groups and kidnapers, which deters farmers from staying late on their farms.<sup>127</sup>

Most farmers in Nigeria do not belong to any trade union but have their cooperatives for welfare purposes

(as discussed in the preceding chapters).<sup>128</sup> There exist several cooperatives in the agricultural value chains set up by NGOs, agricultural businesses, and associations in the various sectors of horticulture such as onions, tomatoes, and pepper, among others. Within the study, cooperatives identified included the AA multi-purpose Cooperative society, MYS multi-purpose Cooperative society, Shiga Youth and Farmers Association, Water Users Association (WUA), Shika trading multi-trading career cooperative Society and WACOT trading multi-trading career cooperative, among others. These cooperatives were mainly local area-based and linked to regional-based cooperatives and associations in some instances. They focus on the profitability and productivity of the members and not the welfare and labor situation of their members. They provided soft loans, inputs, and access to markets among others to members. These cooperatives in most instances were not affiliated to trade unions, although in a few cases, some cooperatives linked to larger associations collaborated with labor unions to lobby state and federal governments on key concerns of their members in respect of government policies. For instance, cooperatives associated with the NOPPMAN collaborated with the Amalgamated Foodstuff and Cattle Dealers Association of the National Labor Congress. While cooperatives and associations were not averse to collaborating with labor unions, the majority stressed the need for added value from the collaboration, especially concerning advocacy at the strategic levels and access to state and federal government subsidies and inputs for their members.

Some employers' associations do engage cooperatives on issues of mutual benefit. For instance, NABG confirmed collaborations with farmers' associations and cooperatives. A representative of NECA confirmed that the association has had engagements with some informal sector groups, but they are yet to establish contact

<sup>122</sup>Interview with a small-scale vegetable farmer in Nigeria.

<sup>123</sup>Nigerian government approves paternity leave for workers | The ICIR- Latest News, Politics, Governance, Elections, Investigation, Factcheck, Covid-19 (icirnigeria.org)

<sup>124</sup>FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA Associations; FGD With Horticulture Farmers Kura LGA, Kano State; interview with the national president of banana and plantain association; interview with the national president of tomato producers' association; FGD with Horticulture farmers; FGD with NIYYA farms

<sup>125</sup>FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA Associations; FGD With Horticulture Farmers Kura LGA, Kano State; interview with the national president of banana and plantain association; interview with the national president of tomato producers' association; FGD with Horticulture farmers; FGD with NIYYA farms

<sup>126</sup>FGD with farmers at NIYYA farms; Interview with UZZI farms

<sup>127</sup>FGD with farmers at NIYYA farms; FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA Associations; FGD With Horticulture Farmers Kura LGA, Kano State; interview with national president of banana and plantain association; interview with national president of tomato producers' association

<sup>128</sup>interview with the national president of the banana and plantain association; interview with the national president of the tomato producers association; interview with the president of the Onion producers' association; FGD with farmers at NIYYA farms; FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA

with those in the horticulture sector. These cooperatives can be an entry point for both trade unions and employers' organizations to establish relationships with horticulture sectors in the informal sector.

Both trade unions and employers' associations (e.g., NECA) bemoaned the lack of incentive for informal horticulture enterprises to formalize their operations. Horticulture entrepreneurs reportedly prefer to be informal because of the high cost involved in formalizing operations. By remaining informal, they escape "harassment from government agencies" about compliance with taxes, social security, and other statutory obligations. Additionally, limited attention from the government on the sector has allowed such informality to perpetuate. Generally, the system does not motivate private enterprises in Nigeria to formalize operations as informality enables them to escape regulation.<sup>129</sup>

Experience of receiving support from external parties (e.g. Government and NGOs) varied with some farmers reporting to have benefited from training programs that enhanced their capacities to improve their yields.<sup>130</sup> Trainings were delivered mainly by NGOs (e.g. Trees Nigeria, Agric NARLS, Exap CAFÉ, Trimming, HADEJIA JAMAARE, Syngenta Vegetable Seed Foundation, etc.) and government programs and usually focused on helping farmers improve cultivation practices (e.g., training on irrigation farming) and financial management (e.g., financial models and techniques), which farmers report were beneficial.<sup>131</sup> Some farmers also reported receiving inputs on credit to be paid after harvest either from suppliers or buyers (i.e. market traders or middlemen).<sup>132</sup> They also received subsidized inputs and seeds (sometimes) from the government which enabled farmers to expand production as they utilized savings on these inputs to expand the farm

size and hire more laborers to support with manual work.<sup>133</sup> Some farmers, however, bemoaned the politicizations of government subsidies noting that "they often end up in the hands of those who do not need them".<sup>134</sup> Mistrust of the government was noted across the different groups of farmers in all locations.<sup>135</sup>

"There is limited transparency and accountability around government programs that claim to support agriculture or horticulture."<sup>136</sup>

"They look for their political people and give them. But for me and other colleagues who are producing bananas, I do not think anybody had anything out of their political system. We did not have anything."<sup>137</sup>

"No support from the government. We hear of news of government grants to farmers, but they do not get to farmers who need them. Middlemen hijack grants and use them for their gains. Corruption everywhere. The major problem we have with them is that their agents monopolize empowerments meant for farmers and give it to just one person and distribution is not even."<sup>138</sup>

"Farmers do not trust the government to empower. Therefore, they do not commit to any project from the government because they feel everything has a political twist; no accountability."<sup>139</sup>

"Government support does not reach us to use; we will hear that the government did this, did that, but as poor men like ourselves will not see it, out of 100%, we might get only 10-25%. Sometimes we are not even aware."<sup>140</sup>

<sup>129</sup>Interview with NECA official.

<sup>130</sup>Interview with the national president of the banana and plantain association; interview with the national president of the tomato producers association; interview with the president of the Onion producers association; FGD with farmers at NIYYA farms; FGD with Horticulture Farmers (Farmers Service Centre Shika, Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA

<sup>131</sup>Interview with the national president of the banana and plantain association; interview with the national president of the Tomato Producers Association; interview with the president of the Onion Producers Association.

<sup>132</sup>Interview with the national president of the banana and plantain association; interview with the national president of the tomato producers' association; interview with the president of the Onion producers' association; interview with the president of the Horticulture Society of Nigeria.

<sup>133</sup>FGD with FMARD

<sup>134</sup>Interview with owners of Niyya farms; interview with the national president of the banana and plantain association; interview with the national president of tomato producers' association; interview with the president of the Onion producers' association; interview with the president of Horticulture Society of Nigeria.

<sup>135</sup>Interview with UZZI Farms; Interview with Banana Farmer In Kano; Interview with Horticulture Society of Nigeria

<sup>136</sup>FGD with farmers at NIYYA farms

<sup>137</sup>Interview with farmers.

<sup>138</sup>Key informant interview with a small-scale vegetable farmer in Nigeria.

<sup>139</sup>FGD with FMARD

“They make you pay a certain percentage, like 5%, to make you collect the item, but sometimes you finish paying and there is no item. Some people prefer dealing with other organizations than the government.”<sup>141</sup>

There are also farmer advocacy groups and organizations that intervene on farmers’ behalf to negotiate better terms and conditions or facilitate access to government programs. For instance, in the Dan-Hassan community in the Kura Local government area of Kano state, farmers mentioned that CAFÉ has been their advocate and ensuring the protection of rights. According to the farmers, CAFÉ is not particularly a labor union, but it does play the role of a labor union (see chapters 2 and 3 for more information about these advocacy groups).

“There is an organization I know, even though they are not a labor union, but what they do is similar to that, they work together with HADEJIA JAMAARE and Transforming Irrigation Management in Nigeria Project (Trimming) that supply water from TIGA Dam to farmers. So, they mediate for farmers, especially when we encounter floods. They come in to protect the right of the farmer, and they sometimes protect the right of Trimming as well, so their functions include right protection... They call them CAFÉ.”<sup>142</sup>

### 5.3. OCCUPATIONAL HEALTH SAFETY AND ENVIRONMENT (OSHE)

Several laws in Nigeria enjoin employers to provide a safe working environment, including the Factories Act (Cap F1 LFN 2004) and the Labor Act. The law mandates employers to provide safe systems and places of work and to take measures to ensure the safety of the workers. They must ensure cleanliness in the working environment, proper ventilation, lighting, and sanitary conditions as well as avoid overcrowding and proper drainage of floors in factory settings. Employers also have a responsibility to:

- i. Ensure the safety of workers from injury and dangers of work/ machinery by providing a safe workplace and work equipment.
- ii. Comply with the conditions of health, safety, and occupational health.
- iii. Ensure machines and work equipment are installed and kept in safe conditions.
- iv. Provide and maintain an adequate supply of drinking water, washing facilities, first aid, and a place for the workers to store their clothing.
- v. Keep safety records and make them available to the inspector, when required.

Workers must not get involved in tasks that can cause injury or that are hazardous such as dangerous liquids and fumes, explosives, inflammable dust, gases, vapors, and other substances. Workers must receive proper training and work under a supervisor who has thorough knowledge and experience of the equipment (e.g., machines).

Despite these elaborate provisions, some horticulture workers reached out during the research and stated their employers did not ensure adequate protection<sup>143</sup>. Lack of protective gear, particularly when working in swamp areas, was highlighted as a concern as it exposed workers to worms and other infections.<sup>144</sup> Similarly, some farmers expressed concerns about exposure to harmful chemicals in the use of fertilizers and pesticides when applied without the required protective gear, especially in the production of tomatoes, onions, and other fruits.<sup>145</sup>

“When they enter swamps, so they usually refuse to work without booths.”

However, few reported providing their workers with protective gear and equipment.

“I provide safety equipment such as boots, shades, and clothing to my workers.”<sup>146</sup>

<sup>141</sup>FGD with Middlemen or Marketers at Farmers Service Centre, Shika, GIWA Local Government

<sup>142</sup>FGD With Horticulture Farmers Kura LGA, Kano State

<sup>143</sup>FGD with farmers in Niyya Farms; FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA

<sup>144</sup>FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA

<sup>145</sup>FGD with farmers in Niyya Farms; FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA

<sup>146</sup>FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA

## 5.4. SOCIAL SECURITY AND SOCIAL PROTECTION

Like most countries in the Sub-Saharan African region, social security is the preserve of a few in Nigeria. The Pension Reform Act (2014) governs the pension framework in Nigeria. The Act establishes a Contributory Pension Scheme which receives monthly contributions on behalf of employees. The monthly contribution is 18 percent split between the employer (10%) and the employee (8%). Sadly, the scheme is limited to all public sector workers. For the private sector, the law mandates that only those with more than fifteen workers contribute social pensions on their behalf. In other words, private enterprises that do not have more than fifteen workers have no obligation to provide social security for their employees. Given that many small-holder farmers and cooperatives as well as small and medium processors would fall within the exempt category for the provision of contributory pensions, there is a need for awareness creation among unions, Enterprise-based Associations, and farmer cooperatives on social protection and relevant benefits outlined in the labor laws of Nigeria and other international provisions ratified by Nigeria.

In the informal sector, health benefit was the most common social protection benefit accorded to workers. Small-scale employers and farmer cooperatives mentioned they cover the medical bills for workers who suffer minor ailments.

"Maybe one of the farmers gets sick in the horticultural sector, we take him to a hospital nearby, I take care, pay everything that is required to give him good health."<sup>147</sup>

"I do not provide any social security because the laborers do not stay for long... I take them to the hospital or buy them drugs when they are sick while working for me."<sup>148</sup>

"I do not contribute to any pension scheme. I joined a pension scheme with my previous employer. Although the company had less than 15 employees, they paid pensions for us. I no longer contribute to my pension. Instead, I have dedicated savings for my kids and me against unforeseen circumstances."<sup>149</sup>

<sup>147</sup>Interview with a banana farmer in Nigeria.

<sup>148</sup>Interview with the small-scale vegetable producer.

<sup>149</sup>Interview with small-scale farmers in Nigeria.

<sup>150</sup>Interviews and FGD with farmers

## 5.5. GENDER AND GENDER-BASED VIOLENCE AND DISCRIMINATION IN EMPLOYMENT

Women in Nigeria are less likely to be active in the labor market; more likely to be in lower-earning opportunities like farming and informal jobs; and earn less for a given level of education and experience than men of the same level. The 2022 Gender Report identifies a gender gap in profits as high as 39% exists between male and female-led small and medium enterprises in Nigeria. Interests in the formal sector dominate Government policies, although women participate in far greater numbers in agriculture, non-farm enterprises, and the informal sector. This is another example of gender bias in Nigerian institutions where legal, political, and cultural ceilings limit women's potential in the labor market. The net result is that almost twice as many women as men live below the poverty line. In a study to examine gender participation in melon production in Nigeria, Odebole (2007) found that 75% of women were partially engaged and 22% were fully involved in the production of melons. This is compared to 81% full involvement and 18 % partial engagement by men. Women are largely engaged in 'light farm activities' like harvesting, fetching water, removal of bean-stalk, and winnowing, among others. However, women dominate, the marketing and sale of harvested produce in the local markets.<sup>150</sup>

The Labor Act provides an entitlement of at least 50% of salary during the period of the maternity leave to female workers in employment for six months or more immediately before the maternity leave. There is no corresponding provision in relation to non-workers and the benefits accruing to a non-worker are subject to the provisions of her contract of employment. The Labor Act permits any employee to nurse her child for half an hour, twice a day, during working hours, to nurse her child. As mentioned earlier, male workers of the federal government and some states- Lagos State also have an entitlement of 14 days paternity and three weeks in Enugu State. Childcare facilities at workplaces are uncommon in Nigeria. Therefore, there is a need to support labor unions to ensure the inclusion of clauses in the Collective Agreements with horticulture sector employers and informal actors that give critical gender-sensitive provisions for female employees during pregnancy where required and spaces for childcare.

## 5.6. CHILD LABOR IN NIGERIA

Child labor is prevalent in Nigeria with the country serving as a source, transit, and destination for forced labor and trafficked adults and children. A proportion of children in Nigeria suffers the worst forms of child labor including commercial sex work and used in armed conflict as well as quarrying granite and artisanal mining. Despite meaningful efforts made by the government and other partners, protections related to the minimum age for work do not apply to children who are

self-employed or working in the informal economy. According to UNICEF (2022), at least 10.5 million children, or one-third of all Nigerian children are out of school, making it the highest out-of-school rate in the world. Analysis of the 2019 General Household Survey showed about 10.4 % of Nigerian children attending school are also engaged in some form of economic activities as shown in Table 5.1.

**Table 5.1** Prevalence of Child Labor in Nigeria

| CHILDREN                       | AGE     | PERCENTAGE     |
|--------------------------------|---------|----------------|
| Working (% and population)     | 5 to 14 | 15 (6,798,456) |
| Attending school (%)           | 5 to 14 | 78             |
| Attending School and Work ( %) | 7 to 14 | 10.4           |

Source: ILO Analysis of General Household Survey (GHS), 2019.

Olusegun (2019) observed that a lot of children work as farm hands and engage in clearing and cultivating large swathes of farmland for their families or employers. Most children found in these environments experience exposure to unhealthy amounts of chemicals and pesticides with little or no protection.<sup>151</sup>

The Nigerian government ratified the Worst Forms of Child Labor Convention, 1999 (No. 182) in 2001, which commits to eradicating child labor in all its forms. The government developed a National Policy on Child Labor to address child labor in Nigeria and formulated a National Action Plan for the Elimination of Child Labor (2020-2025), which outlines strategies for combating child labor. However, implementation remains a challenge due to limited resources, weak institutional capacity, and a lack of coordination among government agencies. There are also cultural and socio-economic factors that contribute to the persistence of child labor in Nigeria, including poverty, lack of access to education, and traditional practices that normalize child labor.

Indeed, both respondents in the in-depth interviews with farmers, and cooperatives reached as part of the FGDs indicated that child labor was prevalent in the horticultural sector, particularly in the vegetable value chains.<sup>152</sup> They also indicated that gains from government programs in some cases have not been sustainable because the government fails to deliver on its promises to farmers. Farmers in the horticulture sector believe mechanization of agriculture could be a panacea to addressing the challenges of child labor.<sup>153</sup>

There were reports of some farms exploiting children to work on their farms to reduce labor costs.<sup>154</sup> Indeed, more specifically, it was noted that using children from farmers' households reduces their labor costs.<sup>155</sup> Child labor was rationalized by perpetrators as a form of socialization that will eventually benefit the children as they acquire appropriate skills for adulthood.<sup>156</sup> Some farmers and cooperatives acknowledged engaging children aged between seven and fifteen for harvesting activities such as picking and carting vegetables.<sup>157</sup>

<sup>151</sup>OLUSEGUN, A. (January 2019), Understanding Child Labor in Agriculture; The Economic and Social Costs and Benefits in Nigeria. Accessed on 03/03/2024.

<sup>152</sup>FGD with farmers at Niyya Farms; FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA

<sup>153</sup>FGD with farmers at Niyya Farms; Interview with owners of Niyya farms; interview with the national president of banana and plantain association; interview with the national president of tomato producers' association; interview with the president of the Onion producers' association; interview with the president of horticulture society of Nigeria

<sup>154</sup>Interview with owners of Niyya farms; interview with the national president of the banana and plantain association; interview with the national president of tomato producers' association; interview with the president of the Onion producers' association; interview with the president of Horticulture Society of Nigeria.

<sup>155</sup>FGD with farmers at Niyya Farms; FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA

<sup>156</sup>FGD with farmers at Niyya Farms; FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; interview with the national president of the banana and plantain association; interview with the national president of tomato producers' association.

<sup>157</sup>ibid

Children between the ages of 10 and 15 are used to support with activities such as transplanting seedlings, fetching water, and harvesting.<sup>158</sup> It is worth stating that children engaged in the horticulture sector

received a fraction of the remuneration for adults,<sup>159</sup> hence reduced labor costs (i.e. NGN5000 and NGN7000 (€6-8.4) monthly or N1500 (€1.50) daily).<sup>160</sup>

"Children from age 10 can plant and prepare land for tomatoes, beans cucumbers, onions, and cabbage among others.... If we stop the children, who will do the work? ...if they are not bringing us machines to work, there is nothing they can do to stop child labor."<sup>161</sup>

"They pick tomatoes, cut the broken ones, and dry them, we adults cannot do it as quickly as they can."<sup>162</sup>

"One thing I want to talk about is using underage children on farms. Most farmers because they want to save money end up using underage children on their farms... they will just give them little food, money, or water and make them work for hours. Most of the time, these farmers shout at them and even beat them when they do things, they do not want."<sup>163</sup>

There is an urgent need to create awareness of the challenges with child labor and the need for sensitization of farmers, cooperatives, producers, and horticulture-dependent communities on child labor practices.

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<sup>158</sup>ibid

<sup>159</sup>interview with the national president of the tomato producers' association; FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA

<sup>160</sup>interview with the national president of the tomato producers' association; FGD with Horticulture Farmers )(Farmers Service Centre Shika. Giwa Local Govt; FGD with Horticulture Farmers Bunkure LGA

<sup>161</sup>FGD with farmers at Kura LGA, Kano State

<sup>162</sup>FGD with Farmers at Bunkure Local Government Assembly.

<sup>163</sup>FGD with farmers at Niyya Farms

# CHAPTER 6: CONCLUSIONS AND RECOMMENDATIONS

Nigeria is a country located in West Africa, situated between the Sahel to the north and the Gulf of Guinea to the south in the Atlantic Ocean. Despite the dominance of the oil and gas sector, agriculture is a significant sector of the economy, employing a sizable portion of the population and contributing to both food security and exports.

Nigeria stands out as a nation with a complex democratic evolution spanning several decades, marked by multiple transitions of power through elections since the return to civilian rule in 1999. It is essential to acknowledge that Nigeria faces substantial democratic and governance challenges. The state's monopoly on the use of force is still limited. There are also concerns that Nigeria's democratic stability, coupled with external factors largely outside the influence of Nigeria, such as the volatile international energy market, has not fully addressed the pressing socio-economic and governance challenges, with implications for trust in the policies of the state.

Economic growth has not been inclusive, and Nigeria's economy faces key challenges of lower productivity and the weak expansion of sectors with high employment elasticity. The number of formal sector workers joining labor unions has contracted over the years, although there are possibilities for the mobilization of workers from the informal sectors.

There is widespread and deep-seated social exclusion caused by poverty. The country faces challenges related to income distribution and poverty alleviation.

While Nigeria's human rights framework is rooted in international conventions and domestic legislation, observers often criticize the country's human rights record, with implications for the respect of human and environmental rights by businesses, including those in the horticulture sector. One of the pressing issues is the implementation and enforcement of labor rights under the Decent Work Agenda, including adherence to International Labor Organization (ILO) conventions by labor unions, associations, and even cooperatives. Many workers in Nigeria still face challenges related to decent working conditions, fair wages, and protection from forced and child labor.

Child labor remains pervasive in agriculture and particularly in horticulture value chains in Nigeria, with the country serving as a source, transit, and destination for forced labor and trafficked adults and children. Despite meaningful efforts made by the federal and state governments and other partners, protections related to the minimum age for work do not apply to children who are self-employed or working in the informal economy.

Nigeria has huge agricultural potential, and the sector remains particularly important. The varied agro-ecological zones, ranging from the forests in the South to the extensive savanna woodland and grassland in the North, provide suitable and edaphic conditions for the production of an array of both local (indigenous) and exotic/adapted tropical horticultural crops. The horticulture sector is largely predominant in the Northern and Middle belts of the country, particularly in the states of Kano, Kaduna, Sokoto, and Jos, where farmers cultivate vegetables such as tomatoes, onions, peppers, and cabbages, often with irrigation in open field production systems. There are also medium to high-tech farms located in the Southwest and around larger metropolitan areas such as Lagos, Abuja, and Port Harcourt.

The Nigerian horticulture value chain remains underdeveloped and informalized and various public and private sector actors dominate activities from the farming stage through processing to final markets. Key players include smallholder farmers, farmers associations and cooperatives, commercial farms, agribusiness companies, processors, exporters, research institutions, industry associations, development organizations, and government agencies. Farmers mostly rely on low-cost and risk-averse inputs and practices due to their limited capacity to invest and vulnerability to shocks that characterize the sector. There are, however, a few patchy medium and large plantations in the sector.

The most common vegetables produced in Nigeria are tomato, pepper, okra, onions, ginger, and sesame, among others. Smallholder farmers or cooperatives/farmers' associations who often grow them on farms under 1-4 ha undertake the production of these vegetables. Concerning fruits, the most common fruits produced in Nigeria are mangoes, citrus (such as oranges), pawpaw, and pineapples. Smallholders or marginal

farmers who often grow fresh produce on farms under 1-4 ha largely conduct the production.

Exports from the horticulture sector in Nigeria remain low and rely on informal channels. West African neighbors like Ghana, Cameroon, Chad, and the Middle East (e.g., Saudi Arabia), are leading export destinations for Nigeria's fresh fruits and vegetables through informal cross-border trade and semi-formal exports. This is often due to food safety and quality issues, high transaction costs, operational challenges, and supply chain corruption affecting prices and export processes. There are few western destinations for vegetables and fruits from Nigeria, although data on these remain patchy.

Aggregators dominate the local horticulture market, and post-harvest handling in this space is manual, with little sorting, grading, cold storage, or value-addition before the transportation of the produce. The aggregators, or intermediaries, serve as intermediaries between farmers and diverse off-takers. Despite the emergence of some formal and private actors, structured trading in the horticulture sector remains limited, with about 90% of fruits and vegetables estimated to pass through informal fragmented channels from farms and cooperatives through aggregators to consumers currently.

A considerable number of people operate within the sector and provide livelihoods for many rural communities, including an estimated 10 million Nigerians directly and indirectly. The workforce is primarily small-holder farmers directly producing fruits and vegetables, and those indirectly involved in jobs such as plant nurseries, food processing, marketing, and transportation, among others.

A plethora of laws, including the National Minimum Wage Act, govern and regulate employment relationships in Nigeria. The National Minimum Wage Act of Nigeria (2019) provides the framework for minimum wage fixing in Nigeria. The 2023 Labor Act recognizes various forms of employment contracts: written or oral, express, or implied. However, Section 7 mandates employers to issue contracts to workers within three months of commencement. The Act also prescribes the minimum terms and conditions that employers must comply with in relation to workers.

Most farmers in Nigeria do not belong to any trade union but have their cooperatives for welfare purposes. Farmer associations like the National Tomato

Growers and Processors Association and All-Farmers Association of Nigeria (AFAN) and farmers cooperatives including AA multi-purpose Cooperative society, MYS multi-purpose Cooperative society represent and advocate for the interests of member farmers, processors, and marketers within policy and value chain spheres. They work through local government area cooperatives and not labor unions. They are, however, open to cooperating with NUAAE and the Amalgamated Foodstuff and Cattle Dealers Association of the NLC if they can be sure of the direct benefits of cooperating with trade unions and providing recognizable platforms for formalizing their members who operate mainly in the informal sector.

Several laws in Nigeria enjoin employers to provide a safe working environment, including the Factories Act (Cap F1 LFN 2004) and the Labor Act. The law mandates employers to provide safe systems and a place of work and to take measures to ensure the safety of the workers. Despite these elaborate provisions, interlocutors highlighted the lack of protective gear, particularly when working in swamp areas, as a concern as it exposed workers to worms and other infections. Employers' associations such as Nigeria Employers' Consultative Association (NECA), an umbrella organization of employers in the organized private sector of Nigeria, provide advocacy and advisory support to employers and represent member interests in national policy discussions around business regulation, economic development, and labor laws, among others. Though NECA frequently interacts with labor unions and federations like the Nigeria Labor Congress in various tripartite policy forums to discuss industrial relations issues, NECA itself does not have a unionized workforce or engage in collective bargaining over working conditions as an employer. Instead, NECA convenes its business members, some of whom have unionized employees. The level of unionization within companies operated by NECA members varies widely across industries and individual firms.

## RECOMMENDATIONS

### Social dialogue

- Support deliberate collaboration between unions, cooperatives, and employers' associations to establish entry points for social dialogue on conditions of workers in the sector among farmers, associations, and cooperatives within the horticulture sector.
- Establish regular consultation mechanisms between government through the MFARD, farmers'



associations such as FACAN, NAPPAN, NOPPMAN, labor unions affiliated with NLC and TUC, and Employers' associations such as NECA to address horticulture sector-specific challenges (e.g., supply of inputs, market access, access to finance and provision of extension services) as well as labor rights issues and develop collaborative solutions.

- Facilitate collaboration between unions such as NUAAE and NUFBTE, among others, Employers' associations such as NECA, and interprofessional bodies such as NABC and NABG to implement structures for their members that emphasize the importance of transparent employer-employee relationships at the workplace. There is a need to tailor structures to the informal nature of the operations and the peculiar needs of the sector.

### Wages and collective bargaining

- Collaboration between Development partners, trade unions such as NUAAE and NUFBTE, and associations/cooperatives within the horticulture sector to train smallholder farmers, farmers' associations, and informal cooperatives in negotiation skills for better wage arrangements and decent work conditions.
- Collaboration between Development partners, trade unions, and employers' associations within the horticulture sector to undertake training of smallholder farmers, outgrowers, associations, and cooperatives to enable the establishment of simple but enforceable contracts and contribute to improved work conditions.
- Collaboration with trade unions such as NUAAE, AUFCDN, and NUFBTE to organize horticulture sector workers, outgrowers, associations, and cooperatives, and resource them to provide CBA services and representation to EBAs and cooperatives to reduce abuses of labor rights and ensure fair and timely payment for farm laborers and aggregators.
- Support labor unions such as NUAAE, AUFCDN, and NUFBTE to collaborate with NECA/NABG to create a sensitive referral pathway in cases of minimum wage abuses, payment delays, and retaliation against laborers who voice concerns about pay or working conditions.

### Labor rights for workers

- Support advocacy of trade unions such as NUAAE, AUFCDN, and NUFBTE with NECA and NABG among others for instituting measures to ensure that employers give permanent employment status to eligible seasonal, temporary, and casual workers in their member companies. This is important because

permanent contracts give workers access to improved working conditions, increased job security, paid leave, improved legal protection, and a greater likelihood of benefiting from private sector codes and standards.

- Support worker education programs designed and implemented by such as NUAAE, AUFCDN, and NUFBTE to inform workers/out-growers and cooperatives about legal and labor rights, in particular their right to freedom of association and collective bargaining, and the conditions under which workers are entitled to permanent contracts and associated social protections.
- Collaborate with development partners and organizations such as NABC, NABG, and NECA among others to ensure employers enshrine compliance with international and national labor rights and payment of at least the minimum wage for all types of workers as a condition for providing financial and/or technical support to private companies in the horticulture sector.

### Occupational Safety, Health, and Environment and Social Protection

- Support collaboration between trade unions, cooperatives/associations of farmers, and input suppliers to train smallholder farmers, outgrowers, associations, and cooperatives on the safe and effective application of chemicals, emphasizing integrated pest management techniques to minimize reliance on pesticides and proper record-keeping on the use of chemicals in their production.
- To boost social security uptake and contribute to reducing the vulnerability of workers in the horticulture value chain, create awareness among workers, members of farmer cooperatives, and enterprise-based associations in processing companies on social security and pensions.
- Create awareness among trade union members, EBAs, and farmer cooperatives about social protection and relevant benefits outlined in Nigeria's labor laws and other international provisions ratified by Nigeria.
- Partner with trade unions and employers' associations to advocate for the government to strengthen the enforcement of state employment/social security schemes. For example, employers within the horticulture value chain should register all eligible employees under these schemes to ensure that workers have a safety net in the face of negative external market shocks.

### Child labor

- Support unions and cooperatives to collaborate with communities to ensure a unified and effective approach in the fight against child labor.
- Sensitization of cooperatives/out-growers and associations of producers and processors on negative effects of child labor practices.
- Support trade unions, cooperatives, and employers' associations to collaborate with state government actors to enforce child labor laws through periodic secret inspections and penalties for non-compliance.

### Gender-based violence

- Build capacities of trade unions to ensure inclusion of clauses that protect women and mandate employers to prevent occurrences of sexual harassment and to sanction perpetrators when they violate these provisions.
- Support NECA and other employers/suppliers' associations to provide special facilities and working conditions for mothers, including the provision of childcare facilities, nursing breaks, and lighter duties for pregnant women.
- Support labor unions such as NUFBTE, and NUAEE among others, and cooperatives to ensure the inclusion of clauses in the Collective Agreements with horticulture sector employers that give critical gender-sensitive provisions for female employees during pregnancy where required and spaces for childcare.
- Collaborate with unions, cooperatives, and employers' associations to work with the government to strengthen laws and policies concerning sexual harassment, occupational health and safety, and childcare provision to reflect women workers' specific needs.

### Unionization/organization of unions and cooperatives

- Support training trade unions on practical skills on how to organize informal sector workers and adapt union structures/processes to accommodate the peculiar needs of workers in the informal sector.
- Support trade unions to affiliate existing scale to large-scale horticultural associations and cooperatives and use that as an entry point to organize local-based or individual farmer's groups who do not have an association.
- Support the formalization of cooperatives and associations among producers, and workers' associations within horticulture sector processing and producing companies to provide collective bargaining power.
- Support informal farmers' cooperatives and

associations to adapt their structures to provide services to members.

- Equip labor unions, small-scale producer cooperatives, and workers' associations within the horticulture sector processing and producing companies with practical skills to organize smallholder farmers, negotiation skills, and grievance reporting processes to improve labor conditions in the sector.
- Develop awareness campaigns and educational programs to inform workers and smallholder farmers about the benefits of joining unions and their rights to decent work.

### Recommendations to private actors in the supply chain for lobby and advocacy work

- Support private sector professional organizations in the horticulture sector such as NECA, NABC, and NABG on their lobbying activities to advocate for policies that facilitate the development of new business models that could bring costs down e.g., transport, renewable energy, packaging, and export.
- Facilitate advocacy towards private sector federations within the sector such as NECA, NABC, NABG, and government to promote the enforcement of labor laws to reduce labor casualization and shift the paradigm towards unionization/organization of workers within the sector.
- Facilitate advocacy through private sector associations such as NECA, NABC, NABG, and labor unions and cooperatives/associations for employers to respect minimum wage standards, OSHE, and CBAs.
- Collaboration between trade unions and interprofessional bodies within the private sector in the horticulture sector, such as NECA, NABC, and NABG, to increase advocacy and engagement on transparency in the distribution of subsidized inputs to farmers.
- Support sustained advocacy and lobbying of state and federal government to encourage the private sector to undertake capacity development of producers, processors, and regulators to engender compliance with international standards like GLOBALGAP and boost the sector's formalization.
- Support in coaching existing and potential producers and processors on export requirements and procedures for the EU via the NEPC, Nigerian Agribusiness Group (NABG), and The Netherlands-African Business Council.
- Facilitate government-led and private sector-led knowledge exchange and partnership programs between states within the horticulture sector working with NIPC, Nigerian Agribusiness Group (NABG), and The Netherlands-African Business Council. This

could involve organizing study tours, farmer exchanges, and workshops to share best practices on agronomic and innovative farming techniques.

#### **Recommendation regarding partner organizations and service providers**

- Support trade unions such as NUAAE, AUFCDN, and NUFBTE with practical skills and strategies to increase unionization of workers in formal horticulture enterprises to extend collective agreements to them to improve wages and conditions of service.
- Support trade unions to facilitate expansion to cover informal sector farmer cooperatives and associations as well as enterprise-based associations that could be affiliated with them to enable unions to either represent them during negotiations (where possible) or build their capacities on negotiations to enable them to negotiate better.
- Collaboration with INGOs such as TechnoServe and PUM to empower trade unions in policy and advocacy

- on environmental standards, child labor, and GBVH.
- Collaboration with service providers and trade unions to facilitate extensive training on social dialogue in existing trade unions in formal horticulture enterprises, enterprise-based unions affiliated to trade unions, and even in the farmer-based associations and cooperatives such as NAPATAN, TOPAN, FACAN, AFAN, NOPPMAN with interest in collaborating with trade unions.
- Support training of smallholder farmers to enable the establishment of simple but enforceable contracts with off-takers and aggregators and contribute to improved work conditions.
- Train farmers on the effective use of PPEs and application of fertilizers and pesticides and assist with the provision of PPEs to smallholder farmers through unions, service providers, cooperatives, and associations of employers.

## **APPENDIX 2:** **HORTICULTURE STAKEHOLDER MAPPING:** **NIGERIA**

**A. GENERAL** (e.g., Embassy agencies, gov't institutions and others involved in general Horticulture)

| NAME   | GROUP TYPE       | DESCRIPTION  | WEBSITE AND CONTACT   | LOCATION  | COMMENT |
|--|------------------|--|---|---|---------|
| Nigerian Export Promotion Council  | Govt institution | facilitating development of export-oriented businesses, diversification of Nigeria's export basket beyond oil and enhancing export trade.      | https://nepc.gov.ng/<br>E-mail(s): ceo@nepc.gov.ng<br>Phone: +23494621555   | Plot 424, Aguiyi Ironsi Street, Maitama, Abuja, Nigeria P. M. B. 133 Garki, Abuja                               |         |
| Horticulture and Agro-forestry Division, Federal Ministry of Agriculture and Rural Development | Govt institution | department responsible for development and promotion of the horticulture and agro-forestry sector  |   | Abuja   |         |
| National Horticultural Research Institute  | Research         | tasked to conduct research into genetic improvement, production, processing, storage, utilization and marketing of tropical fruits, vegetables | Dr. Henry Akintoye Public research institution  | Ibadan  |         |
| Nigeria Agribusiness Group (NABG)  | Association      | Organized Private Sector Platform for Nigeria's Agriculture & AgriBusiness Stakeholders  | Mr. Maxinus N, Policy Advisor   | Head Office: 2Floor Suite 7, 10 & 11, Katsina House80 Ralph Shodiende Street, Central Business District, Abuja. |         |
| Nigeria Union Agriculture and Allied Employees (NUAAE).  | Union            | trade union representing agricultural workers in Nigeria.  | Simon Anchaver - President: 07036004678<br>E. S. Aitokhuehi -<br>Ag. General Secretary: 08061564228 GS<br>-08052220281 GS           | Plot, 609 University of Abuja Teaching Hospital Road, Opposite High Court Complex, Gwagwalada, Abuja            |         |
| National Union of Food, Beverages and Tobacco Employees (NUFBTE)                               | Union            | trade union representing employees working across the food, drink and tobacco processing industries  | Lateef Oyelekan<br>President: 08033297595<br>08024004840<br>Mike Olarenwaju<br>Ag. General Secretary: 08033726573 GS                | 9, Mortune Avenue Lagos-Abeokuta Express Rd. Valley Estate, Dopemu Lagos  |         |
| Food, Beverages & Tobacco Senior Staff Association (FOBTOSB)                                   | Union            | Organises its members, particularly private sector companies and organisations.  | Solomon,<br>+234-1-2916336<br>fobtbssa@gmail.com  | 32, Isaac John Street, Igbobi, Fafeyi, Lagos.   |         |
| All Farmers Association of Nigeria (AFAN)  | Association      | Association representing the interests of farmers in Nigeria   | +234 803 679 9643<br>info@afan.com.ng   | Plot 1, Patricia Etteh Close, Behind Zartech House, Wuye District, FCT - Abuja, Nigeria.                        |         |
| Agricultural Fresh Produce Growers & Exporters Association of Nigeria                          | Association      | Supporting the growth and development of the Nigerian fresh produce export sector  | Akin Sawyer Adetiloge, Farmers Organisation, Representation and Lobby Martin Tajan Musa, Business, Innovation & Partnership Manager | Lagos   |         |

|  |                           |  |   |   |
|--|---------------------------|--|---|---|
| Nigeria Employers' Consultative Association (NECA) | Association               | Umbrella organization of employers in the organized private sector of Nigeria  | Mr Femi Paul, Corporate Affairs and Membership Officer<br>+234-1-3422356/01-3422857 | Lagos   |
| Farmcrowdy   | Service Provider          | Digital agriculture platform that works with rural smallholders to supply tropical fruits for export markets.  | Phone: +234 706 796 3016  | 4b Kafayat Abdulrasaq Street, Lekki Phase 1, 100276, Lagos, Nigeria |
| ThriveAgric Ltd                                    | Service Provider          | Digital platform helps smallholder farmers obtain the most suitable, sufficient and quality farm inputs, and provides them with data-driven and tech | https://www.thriveagric.com/info@thriveagric.com<br>+234 (0) 816 716 4014           | 31, 441 Crescent CITEC Villas, Gwarinpa, Abuja, Nigeria             |
| Niji Farms   | Producers (farms)         | Owns about 3000 hectares of land for fresh fruits production   |   | Ibadan, Oyo and Lagos   |
| Netherlands Embassy (Consulate-Lagos)              | International development | Dutch Consulate  | Michiel Deelen, Brian Udoh  | Lagos   |
| International Fertilizer Development Center (IFDC) | International NGO         | promoted its vision of building healthier soils and plants for a food-secure and environmentally sustainable world                                   | Regional Director IFDC, North & West Africa Division<br>Dr. Oumou Camara            |   |
| Greenport Nigeria                                  | Independent organization  | A major indigenous player in the agricultural sector as a structure for collaboration in the advancement of agricultural development in Nigeria      | +234 807-846-2765  <br>+234 812-121-0802<br>greenportnigeria@gmail.com              |   |
| Bakker Brothers                                    | Seed input and service    | Seed input supplier  | Phone: +234 807 788 6089  | Alheri Link, Stare, Nigeria   |
| Afri Agri Products                                 | INPUT SUPPLIER            | Seed supplier  | 02012958045, 02012957814,<br>08123374949 and 09090402800                            | Kano and Lagos  |
| Profyta  | Service provider          | High Tech input and construction and management  | Ewout Schurink  |   |
| Greenspan Agritech                                 | Service provider          | GH input and construction  | Arnold Vermeulen  |   |
| Netherlands Enterprise Agency                      | International NGO         | supports entrepreneurs, NGOs, knowledge institutes and organisations.  |   | Abuja   |
| Wageningen University & Research (WUR)             | Research Institution      | Horticultural capacity building and research   | Flip van Koesveld   |   |
| East-West Seed Knowledge Transfer (EWS-KT)         | Service                   | non-profit corporate foundation of EWS   |   |   |

|  |   |   |  |  |  |
|--|---|---|--|--|--|
| USAID  | international Development Organization      | Supports agricultural (horticultural) and development projects in Nigeria   | Melissa Jones, Mission Director  | Central Business District City: Abuja  |  |
| Bunkasa Agritech Limited                               | Services                                    | agric - tech support and consulting firm poised providing solutions in the area of post-harvest loss management and service.  | info@bunkasa.com<br>+234 8037047271  | 607, Ikorodu Road, Mile 12 International Market, Lagos   |  |
| Solokad Multiventures Ltd                              | Service                                     | Commercial agro- enterprise r selling agro products   | +234 901-987-2300<br>+234 901-987-2300<br>+234 913-150-0692<br>sales@solokadagrobiz.com  | No 105, Amunigun Street, Ogunpa, Ibadan, Nigeria.  |  |
| Green Eagles Agribusiness Solutions Ltd                | Service and production                      | Agribusiness services   | https://greeneaglesagrobiz.com/<br>Email: contact@greeneaglesagrobiz.com<br>Phone: +234 901 000 7003,<br>+234 901 000 7004, +234 901 000 700   | 11, Kajola Street, Mende Maryland, Lagos   |  |
| SNV  | international Development Organization      | Supports agricultural (horticultural) and development projects in Nigeria   | Emmanuel Akinwekomi,<br>Horticulture Partnership facilitator<br>eakinwekomi@snv.org  | No 6 Ogbagi Street, Off Oro-Ago Crescent, Garki II, Abuja  |  |
| The International Fertilizer Development Centre (IFDC) | international Development Organization      | science-based public international organization working to alleviate global hunger by introducing improved agricultural practices and fertilizer technologies to farmers and by linking farmers to markets such as the HortiNigeria project | 234 9 413 0873   | 6, Ogbaji Street, Off Oro-Ago Street, Off Muhammed Buhari Way, Garki II, Abuja   |  |
| Sustainable Trade Initiative (IDH)                     | international Development Organization      | Supports agricultural (horticultural) and development projects in Nigeria such as The Sustainability Initiative Fruits and Vegetables (SIFAV) project   | Cyril Ugwu, Regional Coordinator, West Africa +234 803 475 4137<br>ugwu@idsustainabletrade.com<br>Coen Frederiks, Program Manager, Fruit & Vegetables<br>+31 (0) 650180675<br>frederiks@idhtrade.org | +234 803 475 4137<br>ugwu@idsustainabletrade.com<br>Coen Frederiks, Program Manager, Fruit & Vegetables<br>+31 (0) 650180675<br>frederiks@idhtrade.org |  |
| SOLIDARIDAD  | international Development Organization      | Supports agricultural (horticultural) and development projects in Nigeria as NISCOPS  |  |  |  |
| TechnoServe  | international non-governmental Organization | Supports agricultural (horticultural) and development projects in Nigeria as Yieldwise project  | +234 9 291 0631  | St off, 14 Ayo Rosiji, Oduduwa Cres, Ikeja GRA, Ikeja, Nigeria   |  |

|   |  |   |  |  |
|---|--|---|--|--|
| World Bank  | international Development agency       | Supports agricultural (horticultural) and development projects in Nigeria as the APPEALS project  | Mansir Nasir<br>Tel : +234-703-583-0641<br>mnasir2@worldbank.org   | 102 Yakubu Gowon Crescent P.O. Box 2826, Garki Abuja |
| Mile 12 International Market  | Association                            | Largest agricultural and allied foodstuff market in Nigeria   | Shehu Usman Jubril, the Chairman<br>Muhammad Yakubu Bubayaro, Director of Information Technology<br>Phone: (234) 0812522248<br>Email: sales@mile12market.com | Lagos  |
| Bunkasa Agritech  | Agribusiness                           | subsidiary of the Mile 12 International market in Lagos.  | Muhammad Yakubu Bubayaro, 607, Ikorodu Road, Mile 12 International Market  | Lagos  |
| Nigerian Institute of Food Science And Technology (Nifst)             | Research/professional body             | Registered Non-Profit Making Body representing Food Professionals   | P.O. Box 2 NITEL Training Centre Cappa, Oshodi, Lagos - Nigeria.<br>Tel: 234-1-8775253   234-702-891-0517<br>E-mail: info@nifst.org                          | Oshodi   |
| National Horticultural Research Institute                             | Govt institution                       | Provides research and advisory support  | https://nihort.gov.ng/<br>info@nihort.gov.ng,<br>nihortinfo@yahoo.com<br>+234 (0) 802 225 5504   | Reservation Area, Idi-Ishin, Ibadan                  |
| AgriHub   | Service                                |   |  | 9 Adepegba St, Ilupeju 102215, Lagos, Nigeria        |
| AgriDec   | Service                                | agric company involve in the agric value chain of various fresh produce, extension an   |  | +234 813 616 3231                                    |
| National Tomato Growers Processors & Marketers Association of Nigeria | Cooperatives/ association              | Made of group of tomato farmers and others in the value chain aimed at  | Executive Secretary: Alhaji Sani Danladi   |  |
| GIZ   | International Development organization | Supports horticulture in Nigeria such as the NICOP aimed at strengthening the competitiveness of Nigeria and enhance the countries' integration into the regional and international trading system. | GIZ Büro Nigeria<br>Country Director<br>Dr. Markus Wagner<br>giz-nigeria@giz.de<br>FCT Abuja<br>+234 805 529 9996  | 12 Charles de Gaulle Street, Asokoro, Abuja          |
| NIRSAL Microfinance Bank  | Service Provider                       | Provides loans for farmers and small businesses   | +2349010026900, +2349010026905,<br>+2349010026907<br>info@nmfb.com.ng  | Monrovia Street, Abuja                               |
| Degold Farms and Services   | Agric business                         | Provides inputs, do farm setup for the production of crops e.g. pineapples  | Abdulazez Abuduigaffer Adewale<br>Phone: +234 816 321 9800   | Address: Oluoyole, Ibadan 200273, Oyo, Nigeria       |



|  |                 |   |                          |            |  |
|--|-----------------|---|--------------------------|------------|--|
| AA multi-purpose Cooperative society           | Cooperative     | cooperative in south-south Nigeria with over 1000 farmer members who are trained on Good Agricultural Practices (GAP) to improve crop production. | 08037087777, 08038810706 | South West |  |
| Shiga youth and farmers association            | Association     | Association   |                          |            |  |
| Wacot trading multi-trading career cooperative | Cooperative     | Association   |                          |            |  |
| FreshForte                                     | Retail/sales    | High end shop of fresh products   | Mr Faith                 |            |  |
| Gartner Callaway                               | Commercial farm | Commercial farm Nigeria incl GH   | André Schaap             |            |  |

## A. FRUITS

| NAME   | GROUP TYPE                  | DESCRIPTION  | WEBSITE AND CONTACT  | LOCATION  | COMMENT |
|--|-----------------------------|--|--|---|---------|
| Alhaji Uba Banana farm   | Production                  | Sole producer and farmer of banana and supplies to markets   | Alhaji Uba Idris Dogara Danhassan  | Kano  |         |
| Dansa holdings limited/ Dansa Foods Processing Company Limited | Processing                  | Large scale. Focused on fruit juice and beverages  | Tel: 08166280411   | 99, Sharada Industrial estate Phase 2, Kano, Kano   |         |
| Frutta Juice and services limited                              | Processing/ exporter        | Large scale. Focused on fruit juice and beverages  | info@fruttafoods.com<br>+234 706 433 3364<br><a href="https://fruttafoods.com/index.html">https://fruttafoods.com/index.html</a>                   | No.1 Adeyanju Daniel Street, Opposite Julius Berger (Apapa) Oshodi Apapa Expressway, Lagos, Nigeria |         |
| Horticultural farmers at Niyva Farms                           | Farmers                     | Group of farmers (in mango)  |  | Kaduna  |         |
| Wilson's Juice Co.   | Processing and for export   | manufacturer, marketer and distributor of Wilson's old-fashioned lemonade, Pink lemonade and other fresh-squeezed beverages. | +234 806 240 2350<br><a href="https://wilsonslimonade.com/sunshine@wilsonsjuiceco.com">https://wilsonslimonade.com/sunshine@wilsonsjuiceco.com</a> | Available in stores but main office at Iju Ota, Ogun State  |         |
| ReelFruit  | Processing and distribution | dried fruit processing, marketing, and distribution company  | Tel: 091 3 938 9529, 0913 938 9522   | Lagos   |         |

## B. VEGETABLES

| NAME   | GROUP TYPE              | DESCRIPTION  | WEBSITE AND CONTACT  | LOCATION  | COMMENT |
|--|-------------------------|--|--|---|---------|
| Tomato Jos   | Processing and export   | Large scale processing. Focused on tomato  | +234 912 405 5052, Kaduna, Nigeria<br>info@tomatojos.net   | Kaduna  |         |
| Dangote Tomato Processing Factory  | Processing              | Large scale processing, focused on tomato  | Tel: 01-2805343<br>info@dangoteagro.com  | 1 Alfred Rewane Road, Falomo, Ikoyi, Lagos.   |         |
| Cubas Group (Star Tomato Paste)  | Processing and exports  | Processes farm products and concentrates into final products (tomato paste) for domestic markets and exports           | info@cubasgroup.com<br>+2349134666845  | 1 Anthony Okafor Industrial Estate, Medina B/Stop, Off Lusada, Agbara Ado-Odo/Ota, Ogun State.                                |         |
| Tomatoes and Orchard Producers Association of Nigeria (TOPAN)                      | Association             | Association aim to increase food security, access to safe, nutritious and sufficient tomatoes and orchard contributing | Mr Oyeleke Bola<br>+234 703 009 0366   | 2nd Floor, NICON Plaza, Plot 242 Mohammed Buhari Way, Central Business District, Abuja, Nigeria                               |         |
| National Union Producers Processors and Marketers Association of Nigeria (NOPPMAN) | Association             | an umbrella association of onion farmers, processors and marketers   | National President, Aliyu Maitasamu Isah<br>Tel: +234 803 4653 152<br>Email:eharvestplus2020@gmail.com | Kano  |         |
| Federation of Agricultural Commodity Associations of Nigeria (FACAN)               | Association             | an active umbrella association at Federal level  | Email: facan2021@gmail.com<br>Phone: 07033924936, 08033142525, 08063211989                             | Block D, Rooms 309 - 317, Federal ministry of Industry, Trade and Investment, Old Federal Secretariat, Area 1, Garki - Abuja. |         |
| Gunni Royal Tomato paste and Allied company  | Processing and export   | Medium scale. Focused on tomato  | +234 802 369 3581<br>groyaltomatoes@gmail.com  | Oyo   |         |
| National Tomato Growers and Processors Association                                 | Association             | advocate for interests of members.   |  | NO 138, ADETUKUMBO ADEMOLA CRESCENT, Wuse, Abuja 234, NG  |         |
| Mystrose Limited   | Processing and export   | Small scale. Focused on vegetable mix  |  | Abuja, Nigeria  |         |
| Alheri Women Tomato Farmers Association  | All female Farmer group | Farmer association mainly in tomato farming/ production  | -  | Kano  |         |
| Forthworths Farms  | Producer /Retail        | Produces fresh vegetables for sale and uses green technology   | -  | Ogun  |         |
| Yadakwari Kofar Gabas Fadama III AF  | Farmers                 | Farmer association mainly in vegetable farming/ production   | -  | Kano  |         |

|  |                           |  |   |  |  |
|--|---------------------------|--|---|--|--|
| Vegetable farmers at BUNKURE                             | Farmers                   | Farmer association mainly in vegetable farming/ production           | -   | Bunkure, Kano  |  |
| Fadama III AF Tomatoes Association,                      | Farmer group/ association | Farmer association mainly in vegetable farming/ production           | -   | Kano   |  |
| Dakasoye Rahama Fadama III AF Tomatoes                   | Farmer group/ association | Farmer association mainly in vegetable farming/ production           | -   | Kano   |  |
| Kauran Dan Gambu Farmers Association                     | Farmer group/ association | Farmer association mainly in vegetable farming/ production           | -   | Kaduna   |  |
| Ung. Sarki Women Multi-purpose Association               | Farmer group/ association | Farmer association mainly in vegetable farming/ production           | -   | Kaduna state   |  |
| Greenbles Agtech   | Producer and agribusiness | Works with farmers to produce vegetables for the market              | Oshin Saed<br>+234802846570   | Oyo  | Works with some farmers in contract arrangements to supply produce after g\harvest |
| Simply Green Limited                                     | Processing                | Processes vegetables and some fruit juice for market                 | www.simplygreenjuice.com<br>Email : info@simplygreenjuice.com<br>Phone : +234 818 900 9009                | 14 Idowu Martins, Victoria Island, Lagos<br>info@simplygreenjuice.com<br>+234 818 900 9009 |  |
| Taraba Vegetables Limited                                | Production and Export     | Produces and exports vegetables                                      | Phone: +234 816 791 8676  | ali - Jalingo Rd, Jauro Bamvo 660213, Taraba, Nigeria                                      |  |
| AACE Foods and Processing                                | Processing and export     | Medium scale processing and export company . Focused on dried spices | https://www.aacefoods.com/<br>Email: info@aacefoods.com<br>Call on: 08172013265, 09086366589, 09081699892 | 3, Celak Avenue, Olaotan Bus stop Sango Ijoko road. Ogun State                             |  |
| Elephant Group PLC                                       | Exporting                 | Leader in agro-exports such as ginger                                | Tel: +234-9136729415<br>Email: info@elephantgrp.com   | 8, Etal Avenue, Oregun, Ikeja Lagos, Nigeria.P.O. Box 1134, Ikeja, Lagos, Nigeria.         |  |
| Kuda Gangara Integrated Tomato Farm (Olam Group Limited) | Producers                 | Tomatoes producers, part of the Olam tomato program                  | Jigawa state  | Jigawa state   |  |
| Obasanjo Farms   | Greenhouse farm           | Farm engineer, 15ha greenhouse farming                               | Oyeniya Samuel Kehinde  |  |  |
| Mibic Organic Integrated Ltd.                            | Aggregator                | Aggregation and sales of organic vegetable powders                   | Maureen Ebele Ajaba   |  |  |
| Lightline 55 farmers cooperative                         |                           | Lead farmer interested in greenhouse farming                         | Emmanuel Ajao   |  |  |

## C. SEEDS AND OTHERS

| NAME   | GROUP TYPE            | DESCRIPTION  | WEBSITE AND CONTACT  | LOCATION   | COMMENT |
|--|-----------------------|--|--|--|---------|
| National Agricultural Seeds Council  | Govt institution      | Oversees overall development and regulation of the national seed industry.                                   | Tel: +2348113887697<br>Email: info@seedcouncil.gov.ng                                  | Abuja-Lokoja Expressway, Sheda, FCT                            |         |
| Prime Agro Seeds   | Producer              | horticulture seed producer established to provide good quality seed varieties for vegetable and legume crops | http://primeagroseed.com/<br>Email: info@primeagroseed.com<br>Phone: +234 913 710 2664 | G.R.A, 1B Federal Avenue, Off Boundary Rd, Benin City, Nigeria |         |
| Premier seeds  | supplier              | Seed input supplier  | +(234) 802-843-5718, 803-388-5883<br>E-mail: info@premierseed.org                      | Ibadan, Kaduna and Abuja                                       |         |
| Tropical General Investments (TGI) Group (Wadcot Limited)<br>Email: enquiries@clicktgi.net | Producer and exporter | Sesame seeds   | Phone:+234 (0) 1 7003000<br>Email: enquiries@clicktgi.net                              | 14 Chivita Av; Ajao Esate Lagos Nigeria                        |         |
| The Seed Entrepreneurs Association of Nigeria (SEEDAN)                                     | Association           | An association of seed sellers and companies   | Yusuf Ado-Kibiya, President  | Abuja  |         |
| East West Seeds  | input supplier        | Seed input supply  | Rutger de Groot Coen Everts  | Netherlands  |         |
| RijkZwaan Seeds  | Seed input supplier   | Seed input supply  | Eugene Agbicode  | Netherlands  |         |
| Syngenta   | Seed input supplier   | Seed input supply  | John van Brussel   | Netherlands  |         |



