OGUN STATE PROGRAMME COORDINATION OFFICE
OF
SPECIAL AGRO-INDUSTRIAL PROCESSING ZONES PROGRAM

TERMS OF REFERENCE (TOR) FOR ENGAGEMENT OF CONSULTANT FOR THE CONDUCT OF MARKET ANALYSIS FOR CASSAVA AND RICE IN OGUN STATE

AUGUST, 2025

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INTRODUCTION

The Federal Government of Nigeria has received a Facility from the African Development Bank (AfDB), International Fund for Agricultural Development (IFAD) and the Islamic Development Bank (IsDB) to finance the cost of the Special Agro-Industrial Processing Zones Program (SAPZ), and intends to apply part of the proceeds towards carrying out various consultancy services. The SAPZ Program is being implemented in the seven (7) States, namely, Cross River, Imo, Kaduna, Kano, Kwara, Ogun and Oyo, and the Federal Capital Territory (FCT).
The overall development objective of the SAPZ programme is twofold: (1) Support the development of SAPZ in high food production areas to supply the domestic food market and create exportable surpluses; and (2) Capacitate smallholder farmers, small agro-processors and traders, and community-based service providers, including women and youth; to take advantage of the market demand created by the SAPZ to sustainably enhance their income, household food security and resilience to climate change.

The SAPZ program will follow a two-phased program approach. Under phase I (2022-2028), the Government and AfDB, over a period of 5 years, will set up enabling Sinfrastructure and investment policies in targeted states. IFAD will operate over a period of seven years. This slightly longer period will allow IFAD to empower smallholders to take advantage of the SAPZs when they are fully operational. The program will be expanded into additional states in subsequent phases, based on lessons learned and the availability of funding.

In phase I, the program will support the set-up of SAPZs in the Federal Capital Territory and seven states, namely Kano, Kaduna, Oyo, Kwara, Ogun, Imo, and Cross River. IFAD will focus on Kano and Ogun states, leveraging its ongoing programs.

Phase I will directly benefit 1.5 million households, including private sector agribusinesses and agro-processors, smallholder farmers, agro -entrepreneurs and agro-dealers. IFAD investments, including through the Green Climate Fund (GCF), will target a total of 100,000 direct beneficiaries (and 400,000 indirect beneficiaries, making a total of 500,000). Rural women and youth are the core target groups. Opportunities for participation will be created for internally displaced persons and persons with disabilities.

The program has four components namely:

➢**Component 1**: Infrastructure Development and Management for Agro-Industrial Hubs (AIHs). Under this ADB-led component, the programme will support the FGN in developing and setting up eight (8) SAPZs in high potential states under phase 1.

➢**Component 2**: Agricultural Productivity, Production, Market Linkages and Value Addition in SAPZ Catchment Areas. Under this component, SAPZ's objective is threefold: (i) support smallholder farmers and small operators to increase their productivity/production and capacity to add value to raw materials on a profitable and environmentally sustainable basis; and (ii) link them to the additional market outlets offered by the Agro-Industrial Hubs (AIHs), off-takers supplying the local and national market who operate in the target area, and small processors/traders supplying the local markets, including primary processors operating in the Agricultural Transformation Centres (ATCs); iii) enhance the resilience and adaptive capacity of smallholder farmers to climate change.

➢**Component 3:** Policy and Institutional Development Support. The objective of component 3 is to support the development of enabling policies, legislation, and regulation for SAPZs in Nigeria to create a conducive business environment for private sector investment and to address inefficiencies and market failures in agricultural value chains.

➢**Component 4:** Programme Coordination and Management. This component will ensure that the programme is efficiently and effectively managed to achieve expected results.

The Special Agro-Industrial Processing Zone (SAPZ) project in Ogun State aims to develop a specialized agro-industrial zone that will enhance agricultural productivity, processing, and marketing in the state. Farmer organizations and enterprise groups play a critical role in the success of the project, and their establishment and strengthening are essential.

The Special Agro-Industrial Processing Zone (SAPZ) project in Ogun State aims to develop a specialized agro-industrial zone that will enhance agricultural productivity, processing, and marketing in the state. The project will focus on cassava and rice value chains, and will require a thorough understanding of the market dynamics for these crops.

OBJECTIVE

The overall objective of this activity is to conduct a market analysis for cassava and rice in the participating Local Governments viz; Odogbolu, Ijebu East, Obafemi/Owode and Yewa North LGAs of Ogun State, with the aim of providing insights into the market dynamics, trends, and opportunities for these crops.

Specific objectives for the assignment are:

i. Map and characterize the key market actors, including farmers, processors, traders and consumers.
ii. Analyze the current supply and demand dynamics for raw and processed rice and cassava.
iii. Identify market trends, consumer preferences and evolving demand patterns.
iv. Analyze price structures, volatility, and market margins.
v. Evaluate the competitiveness, of local cassava and rice products against imported alternatives.
vi. Identify potential market linkages and value addition opportunities for beneficiaries.

SCOPE OF WORK
The consultant will conduct a detailed market analysis covering the following areas:

1. **Supply Analysis**

- Quantify production volumes, seasonality, and geographical distribution of raw cassava and rice.
- Assess existing processing capacities and evaluate the performance of current equipment.
- Analyze the supply of both raw and processed products, including specific varieties.

2. **Demand Analysis by Market Segment**

- ➢ Identify and characterize distinct market segments for cassava and rice products (e.g., households, restaurants, industrial processors, institutional buyers).
- ➢ Map distribution channels (e.g., traditional markets, modern retail, wholesale).
- ➢ Profile customer preferences and attributes for each segment (e.g., price sensitivity, quality, taste).
- ➢ Quantity the demand and growth potential of each market segment.
- ➢ Analyse competing products and their attributes (local vs imported).

3. **Price and Competitiveness Analysis**

- ▪ Analyse historical price trends, volatility, and margins along the value chains.
- ▪ Evaluate the competitiveness of local products, including comparison with import prices.
- ▪ Identify key factors that influence pricings.

4. **Value Addition Opportunities**

- ✓ Identify and evaluate the market demand for processed products (e.g., Fufu, Garri, Cassava flour, packaged Rice).
- ✓ Provide a hierarchy of value addition opportunities based on market demand and profitability.

5. **Market Structure and Actors**

- ❖ Map the principal market actors and their roles.
- ❖ Analyze the participation and potential for greater involvement of youths and women.
- ❖ Assess the role of the informal market and identify the potential for formalization.

6. **Market Infrastructure and Logistics**

- o **Evaluate transport networks, costs, and their impact on market access.**
- o **Assess the availability** of storage and aggregation facilities.

7. **Others**

I. Assess the role and participation of youth and women in the market segments.

II. Provide strategic investment recommendations for production and processing equipment that respond to identified market demand.
III. The consultant is to leverage on the existing market Assessment tool for the design and implementation of this study.

EXPECTED OUTPUTS
The expected outputs of this consultancy include:

I. A comprehensive market analysis report: A comprehensive market analysis report that provides insights into the market dynamics, trends, and opportunities for cassava and rice in Ogun State.
II. Market data and statistics: Market data and statistics on prices, volumes, and market shares for cassava and rice in Ogun State.
III. Recommendations for stakeholders: Recommendations for stakeholders in the cassava and rice value chains, including farmers, processors, traders, and consumers.

REQUIREMENTS FOR THE CONSULTANT
The consultant should have:

I. At least a Master's degree marketing, in Agricultural Economics, Business Administration, Economics with a minimum of 10 years of experience in market research and analysis, with proven experience in agricultural value chains.
II. Strong knowledge of cassava and rice value chains particularly within the Nigerian context.
III. Demonstrated experience in conducting similar market studies under donor-funded projects in the last 5 years.
IV. Proven data collection and analysis skills, including proficiency with statistical sofware.
V. Excellent communication and reporting skills.
VI. Registration/Certification by relevant professional body.

DURATION AND LOCATION
The consultancy will be for a period of 2 months, with frequent travel to the participating Local Governments in Ogun State.

DELIVERABLES

The successful Consultant shall deliver the following milestones to SAPZ as time-lined below:

MILESTONES			TIMEFRAME
S/NO	TASK	DELIVERABLE	
1	Inception Report	Inception meeting and submission of detailed workplan and methodology.	Two weeks after signing of contract agreement.

2	Mid Term Report	Draft Report detailing the following: Data collection and analysis, Market Analysis, key findings and recommendations.	6th week of signing contract agreement
		Presentation of key findings and recommendations to the SAPZ team and stakeholders.	7th week of contract signing
3	Final Report	Incorporate feedbacks on the draft report and submit final report and all related data/final Market Analysis Report and Datasets (hard and soft copies)	8th week of signing agreement
4	**TOTAL CONSULTANCY TIME**		8 weeks

PAYMENT SCHEDULE

20% of the contract sum upon submission and acceptance of the inception report

50% of the contract sum upon submission and acceptance of the draft final report

30% of the contract sum upon submission of the final report acceptable to SAPZ and IFAD.

OUTCOMES/OUTPUTS

At the end of the assignment, the following outputs/outcomes are expected:

I. Inventory of existing FOs and Enterprise Groups provided.
II. Existing FOs and Enterprise Groups realigned along the selected value chain commodities of the State.
III. New FOs and MSME Groups established for ease of program implementation.

METHODOLOGY

The assignment shall involve meetings and direct engagements with members of the rural communities around the ATCs and the service providers. This requires that the Consultant travels around the State.

Data Collection Methods

I. Surveys: Conduct surveys with farmers, traders, and consumers to gather data on production, marketing, and consumption patterns.
II. Interviews: Conduct in-depth interviews with key stakeholders, including policymakers, industry leaders, and market experts.
III. Focus groups: Conduct focus groups with farmers, traders, and consumers to gather qualitative data on market trends and challenges.

Data Analysis

I. Descriptive statistics: Use descriptive statistics to summarize data on market trends, production, and consumption patterns.
II. Regression analysis: Use regression analysis to identify factors influencing market outcomes, such as prices and demand.
III. SWOT analysis: Conduct a SWOT analysis to identify strengths, weaknesses, opportunities, and threats in the rice and cassava markets.

RESPONSIBILITIES OF THE CLIENT (SAPZ)

SAPZ shall be responsible for the following:

i. The consultant shall be given access to previous reports especially from sister project on demand
ii. Facilitate meetings with stakeholders of beneficiaries if required

RESPONSIBILITIES OF THE CONSULTANT

i. The consulting firms shall be responsible for the accommodation, transportation and other operational expenses for their staff in the course of carrying out the assignment;
ii. Bear the cost of production of reports and related documents;

PROCUREMENT METHOD

The Procurement method for the Individual Consultant Qualification Based Selection method (ICS).

PROPOSED DURATION OF ASSIGNMENT

It is envisaged that the consultancy will take 8 weeks from the time the contract is signed. The Consultant/Consultancy Firm should develop a feasible cost-work plan/activity schedule covering a maximum of 8 weeks and submit as integral part of the proposal for this consultancy.

REPORT SUBMISSION

A total of Six (6) copies of the report are to be submitted to the State Programme Coordinating Office (SPIU) Abeokuta.

REPORTING

The Consultant shall report to the State Programme Officer but the Rural Institutions Development Officer (RIDO) at the State Coordination Office shall be the focal point of the consultancy.