

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

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GAIN Report Number:

Nigeria

Retail Foods

Steady Growth of Nigeria's Retail Food Sector

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Report Highlights:

Nigeria's retail food imports are estimated at \$750 million in 2010 and projected to increase by 20 percent in 2011. Changing demographics and lifestyles are resulting in increasing consumer demand and preference for packaged retail foods. Domestic food processing is underdeveloped and there is greater reliance on imports. The EU, Asia and South Africa suppliers are dominant. Despite greater challenges, U.S. exporters should persevere doing business here. As business relationships with Nigerian firms endure, the apprehension of doing business in this market will be overcome.

Post:

Lagos

SECTION I: MARKET SUMMARY

Nigeria is the largest market in sub-Saharan Africa with population of over 158 million growing at 3 percent annually. The economy recorded impressive growth of 7.85 percent in 2010 and 7.72 percent as of the second quarter of 2011 compared to 5.2% forecast for sub-Sahara Africa and food inflation has been on a downward trend from 14.1% in October 2010 to 9.7% in October 2011. Petroleum powers the country's economy and petroleum exports account for 20 percent of GDP, 95 percent of total export earnings and close to 85 percent of federal government revenue.

The average Nigerian spends 72.97 percent of his or her earnings on food with little for discretionary spending as detailed below:

Percent of total food expenditures (Nigeria, 2010)

| Total Food Expenditure | Beverages, tobacco | Breads, cereals | Meat | Fish | Dairy | Fats, Oils | Fruits/Vegetables | Other Foods | % of total food Expenditures |
|-------------------------|--------------------|-----------------|-------|-------|-------|------------|-------------------|-------------|------------------------------|
| % of total expenditures | 2.73 | 34.08 | 12.88 | 15.22 | 5.61 | 5.15 | 15.44 | 8.89 | 72.97 |

Source: IMAP's Food & Beverage Industry Global Report -- 2010: Appendix A-iv

With her population, Nigeria provides a large and attractive retail food sector. The major traditional foodstuffs consumed by majority of the population including, corn, sorghum, tubers, and seafood (fish) are predominantly unprocessed and/or semi-processed. However, changing demographics and lifestyles are resulting in increasing consumer preference for wide range of convenience, processed and packaged as well as nutrition foods. These are assisting Nigeria's retail food sector to expand.

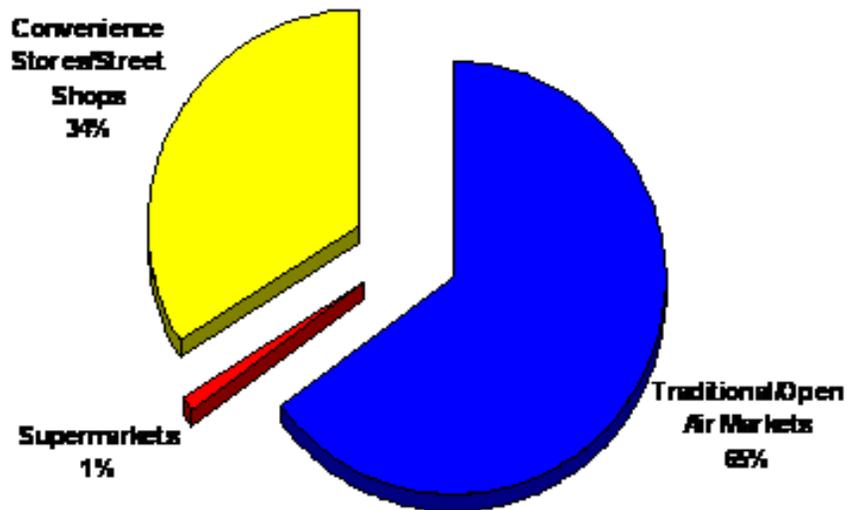
Nigeria's domestic manufacturing recorded average capacity utilization of 53 percent in 2010. Imported manufactured goods continue to far outweigh sales of locally processed consumer-oriented food products mainly due to the high-cost and unreliability of energy supplies (especially electricity), weak infrastructure and inconsistent GON policies. This is creating an opportunity where there is greater reliance on imports.

Analysis of Nigeria's Retail Food Sector

Nigeria had a history of developed supermarket industry until social and economic changes in early 1980s diminished the country's middle class significantly. Since then most Nigerians shop at traditional open-air markets or purchase their goods from traders and street vendors.

Currently, Nigeria's retail food sector consists of supermarkets, convenience stores/small groceries, and traditional, open-air markets sharing 1.0 percent, 34 percent and 65 percent of total retail food sales, respectively.

Composition of Nigeria's Retail Food Sector



Transformation in the Sector

Although the traditional open-air markets remain the dominant channel for Nigeria's retail food sales, the country's retail food sector has been undergoing change over the last decade with international supermarket brands entering the country; new malls being constructed and the steady transformation of informal markets into more formal and modern facilities are setting new bars by providing a wide choice of shopping experiences in a modern, customer-oriented, building.

The modest boom in the development of shopping malls and formal outlets is mainly resulting from:

- Nigeria's high oil prices, relative political stability, population growth.
- The expansion and the general upward trend of all the non-oil sectors of the Nigerian economy.
- The growing middle-class and income with the rising expectations and sophistications of this consumer group.
- The activities of both the state and federal governments to renew the urban areas and encourage the entry of international retailers, etc.
- Increasing Multi-national Investments.

With Nigeria's current attraction to foreign companies and multinationals, consumers are exposed to a wider range of products—including the private labels of some of the biggest companies. Traditional grocery retailers have also increased the stock and range of non-grocery items they offer to include clothes and footwear, consumer electronics and appliances, books, toys, personal and home care products, household furniture and furnishings, etc. However, demand for the basics or 'must-haves' are still far greater than items perceived to be luxury goods.

Growth has also remained strong and steady for the processed and packaged food market in Nigeria. The increase is resulting from:

- Improving product quality, the growing sophistication of Nigerian consumers.
- Increasing disposable incomes—especially among the middle class consumers.
- Advertising and marketing activities of firms have also increasingly been targeted at the sophisticated tastes of the upper end of the market.
- Expatriate community has also continued to expand.

The foreign and multinational companies generally dominate in Nigeria's retail sector and they include:

- ShopRite, a multi-national supermarket firm from South Africa, has operated in the Lagos city of Nigeria for more than 5 years and has opened more than 16 additional stores in Nigeria this year (<http://www.shoprite.co.za/pages/127416071/about/shoprite-in-africa.asp>)
- Recently, SPAR partnered with a Nigerian supermarket firm to launch its first outlet also in Lagos. (SPAR is a Dutch-based supermarket giant founded in 1932 with global revenues in excess of 27 billion Euros, and the world's largest food retailer with approximately 20,000 stores in 35 countries) Their presence is expected to set up competition within Nigeria's retail food sector and further the changing shape of the country's retail food merchandising. Industry experts project a quick recovery of Nigeria's supermarket/food retailing as about 200 million additional customers expected to enter the hypermarket within the next one year (<http://www.spar-international.com/about-spar/spar-countries/nigeria>)
- Walmart Stores Inc (USA) offered US\$4.6 billion to buy a South African supermarket giant Massmart Holding Ltd (<http://www.massmart.co.za>), in order to acquire the African retail network, including the Game outlet in Nigeria.

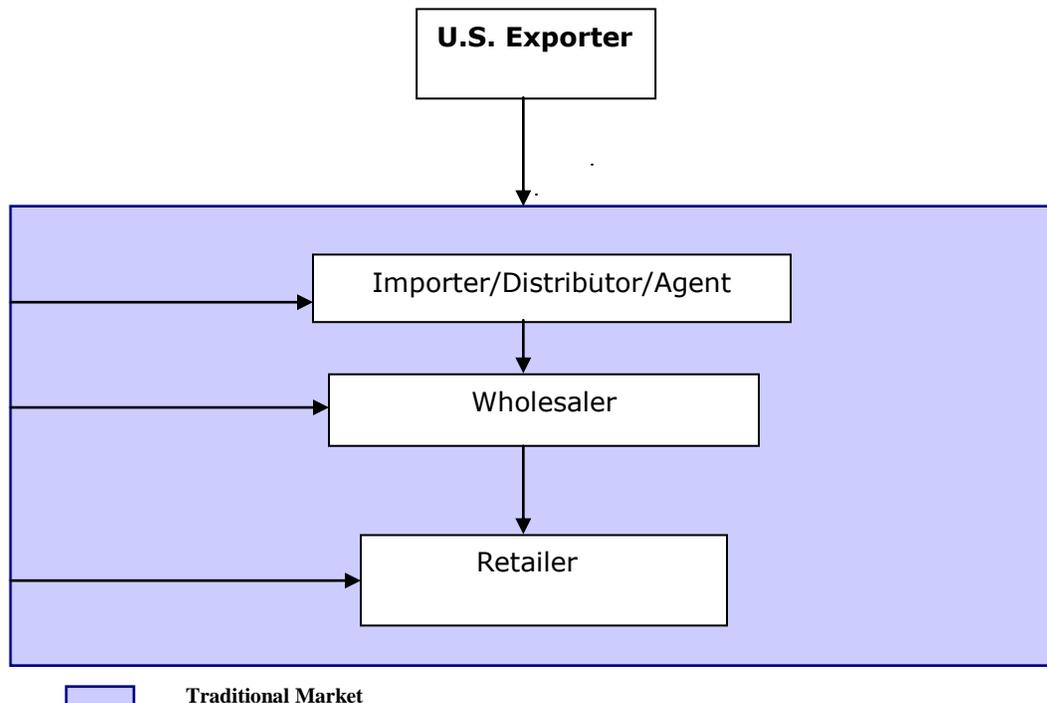
Some large multinationals also partner with Nigerian companies to repackage and/or market their products in Nigeria in order to minimize market entry challenges and buoy on existing marketing and distribution strengths of the local firms. The major players include:

- Nestlé Nigeria Plc (Switzerland)
- Cadbury Nigeria Plc (UK)
- UAC Foods (Nigeria)
- De-United Foods Industries (South Korea/Nigeria)
- Dangote Industries Ltd (Nigeria)
- Promasidor (South Africa)
- PZ/Cusson Nutricima (UK/Ireland)
- Coca Cola Company
- HJ Heinz Co (USA)
- CHI
- FrieslandCampina /WAMCO Nigeria (The Netherlands)

Distribution Channels

Nigeria's retail food merchandising usually follow the channel shown in flowchart below:

Typical Distribution Channel in Nigeria's Retail Food Sector



- An importer may either be the U.S. exporter's appointed agent and sole representative or he may be buying mixed-grocery containers from various consumer-oriented food exporters and wholesale/retail outlets around the globe.
- The wholesaler sells to retailers in large quantities and at discounted prices.
- Retailers purchase more than 80 percent of their stock of consumer-oriented foods from importers and wholesalers located in the traditional open markets.

Changing Distribution Trend

Recently, there have also been growing instances where middlemen such as the wholesalers/agents are bypassed in Nigeria's distribution channel for consumer-oriented food. With the changing trend, processors/manufacturers/Importer-distributors seek competitiveness by selling large volumes directly to retail food outlets. This trend is becoming attractive to multi-national supermarkets/hypermarkets and food service firms. As a result, some of the large supermarkets now receive stock directly from exporters.

Regulations of Retail Food Products

All processed foods must be registered with National Agency for Food and Drug Administration and Control (NAFDAC) to be legally importable into Nigeria. Application for registering regulated products is made by the manufacturer. Foreign manufacturers must appoint a duly registered Nigerian firm to represent them and handle their product registration with NAFDAC. This firm is a

local importer-distributor desiring to distribute exporter's products in Nigeria. Please visit, [Food and Agricultural Import Regulations and Standards - Narrative_Lagos_Nigeria_12-14-2011](#), for details

The following table describes Nigeria's retail food sector:

| | Supermarket | Convenience Stores | Traditional Markets |
|------------------------------|--------------------|---|---|
| Average Size (sq. m) | 100-500 | <20-50 | Clusters of stalls of 5-10 square meters in a large open air area |
| Number of Outlets | 100 | 500,000 | 2,000 (locations) |
| Market Size Served (%) | 1 | 34 | 65 |
| Average Annual Turnover (\$) | 2.5 million | 50,000 | Approx. \$4 million per location |
| Location | Urban | urban | 3:2 (urban to rural, respectively) |
| Stock Level | Full-Line | Limited | Very Limited |
| Service Method | Self-Serve | 4:1 Assisted: Self-Serve, respectively) | Assisted |

Importer preferences are evident for consumer-oriented food products with the following characteristics:

- Relatively small-sized products prepared and packaged for affordable one-time use.
- Bulk, intermediate products and ingredients (especially, dry dairy products, beverage bases and flavors) for local re-processing and packaging.
- Mixed-containers of high-value products and brands.
- Perishable food products processed and packaged for long shelf life without refrigeration.

Nigerian consumers are price sensitive. Consumer demand for small-sized consumer-ready food products, prepared and packaged for one-time use, is high due to their affordable sizes. Price differentials are not too wide apart between the domestic products and imports despite the higher quality of imported products due to high cost of local production. However, the U.S. products are relatively more expensive than imports from third-country competitors mainly due to higher freight charges. Nevertheless, U.S. products are perceived as higher quality products and preferred by high-income consumers.

The interplay of pricing patterns and relationships of U.S. products among competing products in the local market are shown in the tables below:

Suppliers' Pricing Pattern

| Description | Domestic | Other Country | U.S. Products |
|----------------------------------|-----------------|----------------------|----------------------|
| Average retail mark-up (/100) | 1.0 | 1.30 | 2.0 |
| Average market cost ratio (/100) | 1.0 | 1.10 | 1.60 |

Pricing pattern for the retail sector sub-groups

| Description | Traditional Markets | S/Mkts | Convenience Shops |
|------------------------------------|----------------------------|---------------|--------------------------|
| Retail mark-up (Imported Products) | 1.0 | 1.40 | 1.20 |
| Retail mark-up (Domestic Products) | 1.0 | 1.15 | 1.05 |

Pricing pattern among retail sector channel members

| Description | Importer | Wholesaler | Retailer |
|-----------------------|-----------------|-------------------|-----------------|
| Average Price Mark-up | 1.00 | 1.15 | 1.40 |

Advantages & Disadvantages:

| Advantages | Disadvantages |
|--|---|
| Nigeria's population of about 158 million is growing at three percent per year | Insignificant presence of U.S. agribusinesses in Nigeria and limited knowledge of the Nigerian market among the U.S. trade |
| Growing middle-class and number of discerning Nigerian consumers demanding more varieties of hygienic and nutritious foods | U.S. products seldom carry readable "Best Before" dates as required by GON food regulatory body. (The "Day/Month/Year" order or a spell-out of months is preferred) |
| Nigerian consumers' perception of U.S. foods as higher quality items | Low consumer purchasing power |
| Increasing demand for convenience-type foods due largely to: a continued massive rural-urban migration, increasing female workers and school children | Shorter shelf life labeling of U.S. HVPs and the time-consuming port clearance procedures |
| Growing food processing and HRI sectors demand intermediate products and ingredients | Limited contact; negative perceptions about Nigerian businesses among U.S. exporters and a reluctance to do business in Nigeria |
| Growing western-style retail sector | GON's import ban and high tariffs on many food and agricultural products |
| Adoption of the 'Global Listing for Supermarket' items by food regulatory authorities offering a relatively low cost, low risk market-entry opportunity (window) for consumer-ready foods not banned for imports | Direct U.S. to West African shipping route is infrequent—transshipments, often made at EU & South African ports add to cost and longer shipping time |
| Nigerian firms generally see U.S. suppliers as a reliable source, in terms of volume, standards and quality | US freight rates are significantly higher than those from the EU, Asia & South Africa |
| Privatization of port operations reduced customs clearance time | High level of unofficial transactions and procedures |
| Nigerian consumers readily adapting U.S. tastes and preferences especially for convenience-typed foods and snacks | Clearance of goods in ports takes 3-4 weeks with attendant demurrage and costs while it takes about 48 hours in other countries |

SECTION II: ROAD MAP FOR MARKET ENTRY

Entry Strategy

Nigeria is a founding member of ECOWAS and a signatory to ECOWAS Common External Tariff (CET) agreement, which seeks to eliminate import bans and replace them with relatively lower tariffs, among member states. Despite this, GON operated a protective trade regime (especially, import ban and high tariff) from 2001 until late 2008 when it reviewed its tariff structure and partially adopted the more liberalized CET).

Import bans on several key consumer products were removed while the high tariffs on some retail products were reduced significantly. The applied duties under the CET was significantly liberalized compared to earlier rate and ranged from five to 20 percent in partial conformity with CET. The number of the basic products however, remains banned for import, particularly fruit juice in retail packs, beer, pasta products, poultry products, pork and beef.

As of January 2006, GON also replaced Pre-shipment Inspection (PSI) with Destination Inspection (DI). This means that all goods destined exported Nigeria's ports are inspected at the point of entry rather than the point of shipment as was the case. The GON also appointed private firms function as DI service providers and provide x-ray cargo scanning services at entry ports. They also review importers' documents and issue a Risk Assessment Report (RAR) to provide basis for Nigeria's Customs (NCS) to calculate duty chargeable on imports into Nigeria.

Post encourages U.S. exporters of retail food products to consider doing business in Nigeria which is a large and profitable market:

- U.S. firms should mostly consider the export and promotion of their high quality products that can be sold at entry level prices in this market.
- Mixed or consolidated containers are easier to register with GON' food import regulatory agencies.
- Nigerian buyers also want consolidators based in the U.S. that can handle their orders and ship their purchases directly to them in Nigeria.
- Most Nigerian buyers will make direct fund transfer to pay for their purchases prior to shipment.

The importer-distributor is central and the first contact for entry into Nigerian market. The major players for imported consumer-oriented food merchandising in Nigeria are:

- Importer-distributors
- Agents/Sole Representatives
- Wholesalers
- Retailers

New-to-market U.S. food and agricultural products exporters wishing to sell to Nigeria's retail food sector should consider one or a combination of the following market entry strategies and tactics:

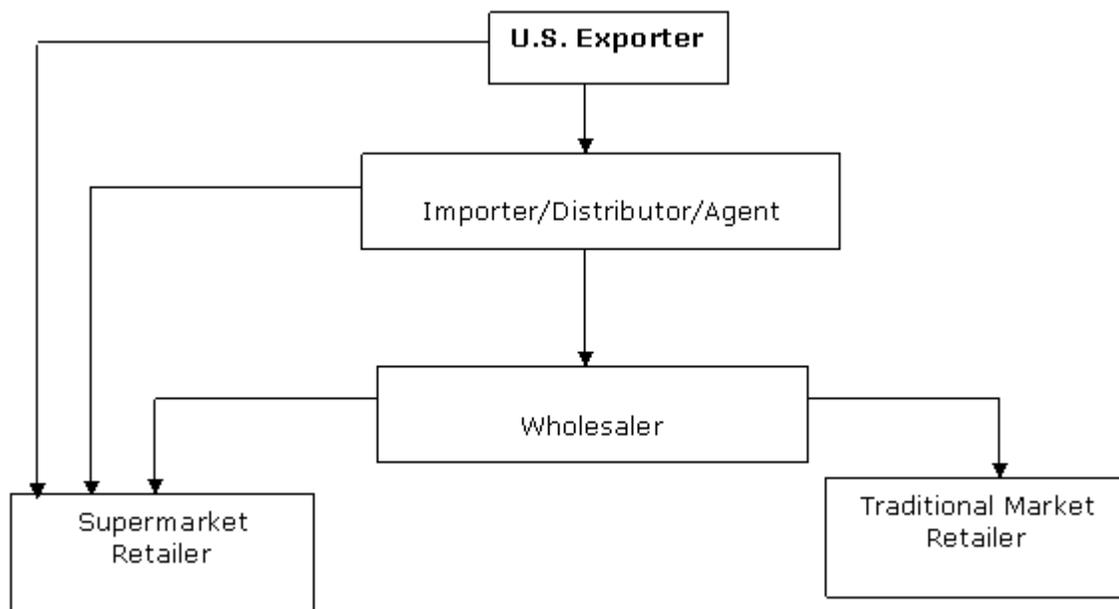
- Contact the Office of Agricultural Affairs in the U.S. Consulate at Lagos-Nigeria, for assistance in selecting reputable importers interested in representing the U.S. firms for handling product registration with the GON's food regulatory agency, NAFDAC and marketing Directly contact the selected importer-distributor/s with sales catalogs (Product samples could be sent when necessary)

- Identify and sell through consolidators based in the U.S. who are serving the West African region. This can now be relevant for the sale of mixed containers applying NAFDAC’s “Global Listing of Supermarket” products. Read USDA’s FAIRS Country Report, [Food and Agricultural Import Regulations and Standards - Narrative_Lagos_Nigeria_12-14-2011](#), for details.
- Exhibit at the National Restaurant Association (NRA) trade show in Chicago as well as the FMI (supermarket) trade show also in the U.S., which Nigerian importers attend and where follow-up contacts can be made.
- Offer flexible shipping volumes and small-sized packaging, indicating spell out manufacture date and date of expiration.
- Adopt a pricing strategy which encourages importers to initiate buying activities with U.S. suppliers.

Market Structure

A. Supermarkets:

Distribution Flow Chart for Supermarket Market



- An importer may either be the U.S. exporter's appointed agent and sole representative or he may be buying mixed-grocery containers from various consumer-oriented food exporters and wholesale/retail outlets around the globe.
- The wholesaler sells to retailers in large quantities and at discounted prices.
- Supermarkets procure goods directly from the wholesalers or local consolidators and sometimes from other retailers in the traditional markets depending on size and financial leverage.
- Importers also own most supermarkets in Nigeria—often they register trading/importing firms distinct from their supermarket operations for sourcing the supermarkets’ merchandising

requirements and selling to competing retailers.

- Supermarkets purchase more than 80 percent of their consumer-oriented foods stocking from importers and wholesalers located in the traditional, open markets.
- Discerning and health-conscious consumers are growing in Nigeria—they will be willing to pay more for products they trust their source.
- Most Nigerian supermarkets now run bakery, restaurant and fast food service operations in a section.

Company Profiles of Major Supermarkets

| Retailer | Ownership | Sales (\$Mil) | No. Of Outlets | Location (City) | Purchasing Agent Type |
|--------------------|---------------------------------------|---------------|----------------|---------------------|-----------------------|
| ShopRite | South Africa | >10 | 16 | Lagos, Enugu, Abuja | Importer-distributor |
| SPAR/Park 'N' Shop | Dutch & Indian/Resident in Nigeria | >10 | 2 | Lagos, Abuja | Importer-distributor |
| Goodies | Lebanese/Resident in Nigeria | >8 | 5 | Lagos | Importer-distributor |
| Amigos | Lebanese/Resident in Nigeria | >5 | 1 | Abuja | Importer-distributor |
| Exclusive | Nigerian | >4 | 2 | Abuja | Importer-distributor |
| Everyday | Nigerian | >4 | 2 | Port Harcourt | Importer-distributor |
| Grand | Nigerian & Indian/Resident in Nigeria | >5 | 1 | Abuja | Importer-distributor |
| Legend | Lebanese/Resident in Nigeria | >3 | 1 | Abuja | Importer-distributor |
| Bestway | Nigerian | >3 | 3 | Port Harcourt | Importer-distributor |
| Chanrai's | Indian/Resident in Nigeria | >2 | 2 | Port Harcourt | Importer-distributor |
| Roban | Nigerian | >2 | 1 | Enugu | Importer-distributor |
| Esco | Nigerian | >2 | 1 | Warri | Importer-distributor |

Source: Industry

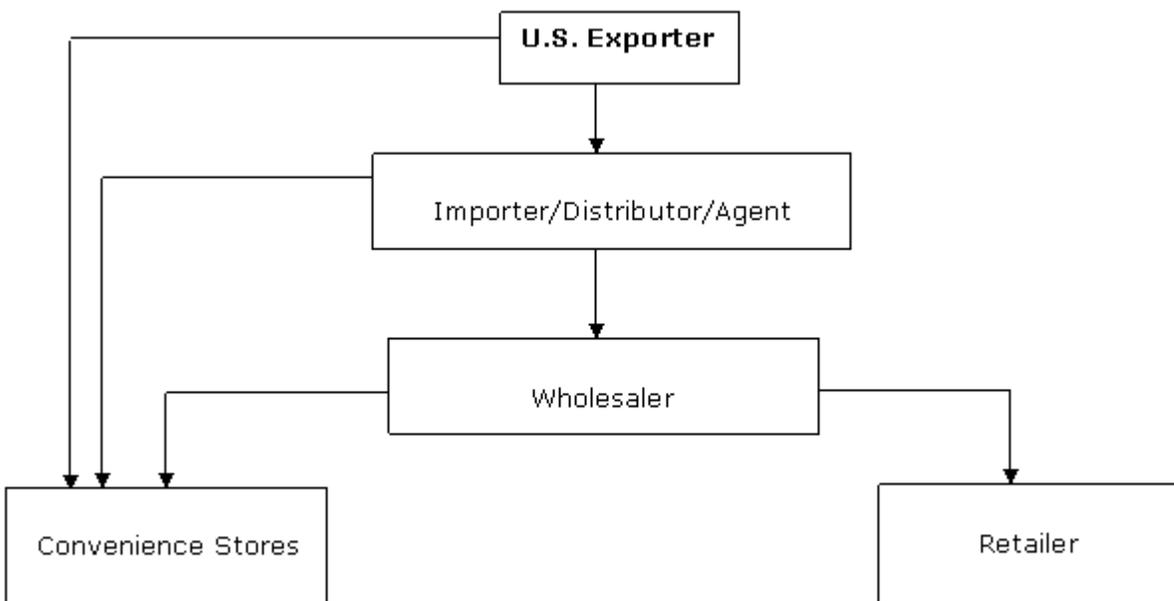
B. Convenience Stores/Grocery Shops/Kiosks/Gas Marts

Convenience stores are including mini-supermarkets, more than 500,000 small grocery stores, more than 2,000 gas marts, numerous kiosks, and roadside stalls:

- Have limited capitalization and significant space limitations.
- Buy mostly from wholesalers and retailers in the traditional market.

- Importers sell directly to the convenience stores for promotional reasons.
- Less than two percent of convenient stores sell frozen foods due largely to poor and irregular electricity supply.
- Kiosks typically are located at prime locations where high sales potential exists and where municipal authorities issue only temporary building permits—they are also fewer in number than roadside stalls.
- Gas marts are growing rapidly and serving more mobile buyers. However, they render minimal food sales.
- Usually, product prices at these outlets are markedly higher than charged by other convenience store retailers.

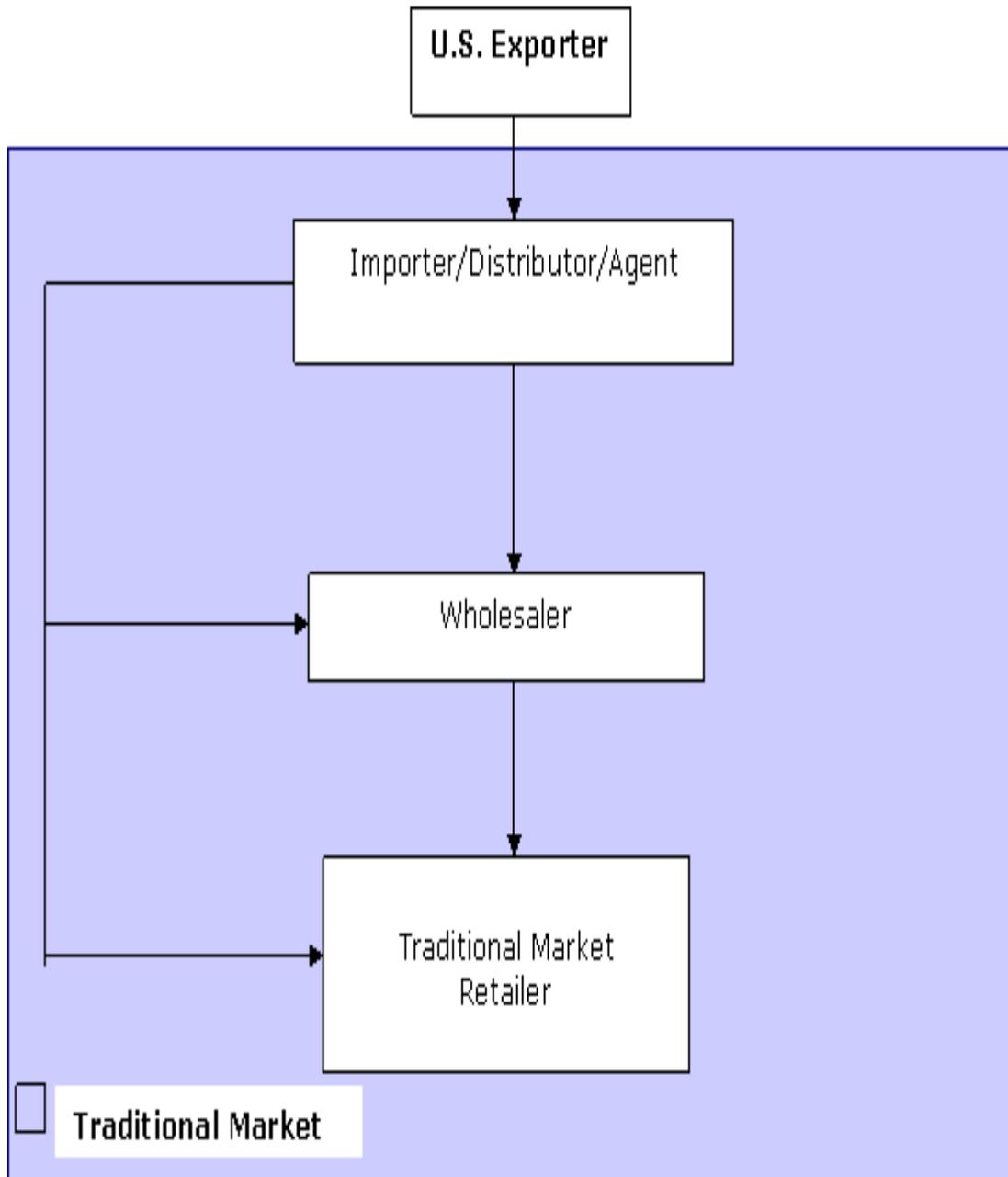
Distribution Flow Chart for Convenience Stores



C. Traditional Markets

- Retailers buy from wholesalers due to limited capital.
- More than 90 percent of imported consumer-oriented food products are sold through channel members located in Nigeria's traditional market.
- About 70 percent of all wholesalers and retailers are located in the traditional markets.
- Nearly all importers have satellite outlets or representative in the traditional markets.
- Prices are about 20-30% lower than in alternative retail outlets.
- Pricing often is not fixed and ultimate sales price is negotiated on the spot in these markets.
- More than 90 percent of the local staple foodstuffs, including fresh fruit and vegetables, meat and frozen fish (imported or local) are sold to ultimate consumers at Nigeria's traditional markets.
- Outlets consist of small stalls clustered in large area open market venue.

Distribution Flow Chart for Traditional Market



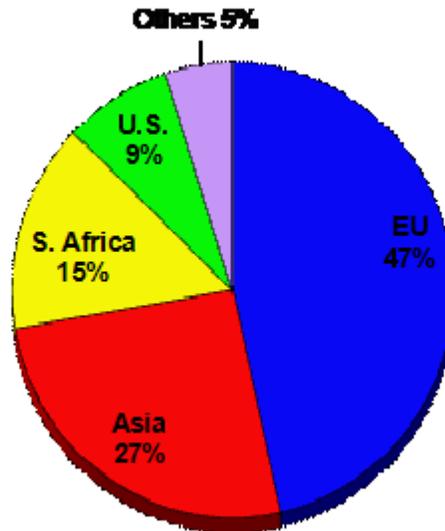
SECTION III: COMPETITION

Imports and Suppliers

Consumer-oriented food imports are estimated at \$750 million in 2010 and industry sources forecast the figure will increase by 20 percent in 2011. The EU, Asia and South African firms will remain the dominant suppliers to the Nigerian market by the end of 2011.

Industry estimates of the origin of imported processed food products in 2010 are shown below:

Nigeria's Suppliers of Consumer-Oriented Products (2010)



Market share for U.S. consumer-oriented food products was about 5 percent of the total (\$400 million) of food products exported to Nigeria in 2006. Industry sources and Post visits indicated that the figure for U.S. consumer-oriented foods exported to Nigeria in 2010 was worth nearly \$70 million representing about nine (9) percent of the estimated total (\$750 million). Importers report that third-country suppliers (including firms in the EU, Asia and South Africa) make physical contact with the market and key players in Nigeria's retail food sector. These suppliers understand Nigeria's local practices better than the U.S. exporters and often are able to handle the demands of Nigerian importers.

Market access remains a major challenge despite the country's port and import reforms. Although exports of U.S. consumer-oriented foods to Nigeria continue to grow, many food products are still banned for imports. With the recent availability of a direct shipping route from the United States to Nigeria reducing ordering and shipping time, market share for U.S. food product has continued to increase.

Although increasing, the U.S. market share is comparatively low due mostly to:

- Higher freight rates for shipments from the United States resulting to higher market prices.
- Unfavorable perception of Nigerian firms by many U.S. firms and their unwillingness to do business in Nigeria.
- Nigerian importers usually request collaboration to falsify documentations and product specifications and many U.S. exporters' are reluctant to meet these importers' demands.
- Lack of sufficient contacts between Nigerian importers and U.S. consumer-oriented food

exporters.

- Physical presence of Asian firm including their personal participation in distributing and promoting their consumer-oriented foods in all the sub-groups of Nigeria's retail food sector.
- Strong price competition from other countries especially the EU and Asia.

Unique Shipping Preferences of the Nigerian importers include:

- Prefer Purchasing mixed containers.
- Want to minimize shipping costs and prefer the services of freight consolidators in the U.S. to handle their ordering and shipments.
- Seek exclusive distribution agreements from exporters.
- Ensure that products labeling carry 'Best Before Dates'.

Competitor Advantages include:

- Nigerian importers easily and readily employ the services of freight consolidators located in the EU.
- Nigerian importers find it easier to register subsidiary companies in the EU, Asian and other African countries for sourcing their import requirements.
- A relatively lower freight on shipments from the EU, Asian and other African countries.
- Asian firms (their personnel and/or appointed representatives) have personal relationships with their Nigerian buyers to obtain essential marketing information and orders.

U.S. exporters are advised to persevere in this market as business relationships with Nigerian firms endure. U.S. agribusinesses interested in doing business in Nigeria, can seek assistance of USDA/FAS office in Nigeria to establish contacts and develop business relationships with local firms.

SECTION IV: BEST PROSPECTS

Consumer-oriented products which are allowed for export to Nigeria

- Breakfast Cereals & Sugar confectioneries (sweets/chocolate), biscuits, candy products, etc
- Wine, including sparkling wine
- Alcoholic beverages & Spirit & Liqueurs (excluding beer)
- Fresh Fruits and Vegetables
- Canned vegetables
- Nuts, Milk, Cream (powdered), Honey products
- Spices, Sauces including, Soy Sauce, Mixed Seasoning
- Coffee, Tea & Herbal products
- Yeast & Baking Powder
- Tomato Ketchup; Mayonnaise; Salad Dressing & Canned Soups
- Baby Foods & Health Food products
- Sweeteners & Non-Dairy Coffee Whiteners
- Powdered beverages
- Packaged rice
- Snacks Foods; Chocolate, etc

Product type offering the most sales potential in Nigeria

- Agricultural-based food ingredients & Aquaculture Feeds
- Frozen seafood & Processed fruits and vegetables
- Fast food, other HRI food ingredients and dairy products including, ice cream and yoghurt
- Industrial processed foods & beverages especially, fruit juice concentrate, and bulk products for local re-processing and packaging
- Bakery, confectionery, and food preparation ingredients & Specialized food ingredients such as additives, preservatives, and flavorings
- Nutrition/health food products & Ingredients and additives for feedstuffs
- Relatively small-sized imported or domestic-processed HVPs, prepared and packed for one-time use, etc

Products Currently Banned for Exports to Nigeria

- Wheat flour (HS Code 1101.0000); Sorghum (HS Code 1007.0000) &
- Millet (HS Code 1007.0000) & Vegetable Oil (HS Codes 1507.1100-1516, 2000)
- Frozen poultry & poultry products (HS Codes 0207.0000-0207.3600)
- Cassava & cassava products (HS Codes 0714.1000, 1106.2000, 1108)
- ++ Bottled water (HS Codes 2201.0000-2202.0000) & Beer (HS Code 2203)
- Noodles, including spaghetti (HS Codes 1902.1100 – 1902.4000)
- **Fruit juice in retail packs (HS Codes 2009.1100 – 2009.9000)
- Pork and pork products, beef and beef products, mutton, lamb, and goat meat (HS Codes 0210.1900, 1602.4900, 0202.2000, 1602.5000, 0204.4200, 0204.4300, 1602.9000, 0204.1000, 0204.2200, 0304.3000, 0204.4200, 0204.4300, 0210.7900, 0204.5000, 0208.9000, 0210.9900 and 1602.9000)
- Live or dead birds (HS Codes 0106.3100-0106.9000, 0208.9000 and 0210.9900)
 - ** Fruit juice may be imported in concentrates or drums only.
 - ++ Sparkling and non-sparkling bottled water

SECTION VI: POST CONTACT AND FURTHER INFORMATION

1. Agricultural Affairs Office (USDA/FAS)

American Consulate General
2, Walter Carrington Crescent
Victoria Island, Lagos-Nigeria
Tel: 234 -1-460-3400, 460-3577
E-mail: aglagos@usda.gov
Website: www.fas.usda.gov

2. National Agency for Food & Drug Administration & Control (NAFDAC)

Plot 204, Olusegun Obasanjo Way
Wuse Zone 7, Abuja-Nigeria
Telephone: (234) -9-671-8008, (234)-1-473-0643
E-mail: nafdac@nafdac.gov.ng
Website: www.nafdac.gov.ng

3. Nigeria Customs Service

Customs Headquarters

3-7, Abidjan Street
 Off Sultan Abubakar Way
 Wuse Zone 3
 Garki-Abuja, Nigeria
 Tel: 234-9-523-4694, 523-6394, 2534680
 E-mail: info@customs.gov.ng; pro@customs.gov.ng
 Website: www.customs.gov.ng

4. Federal Ministry of Agriculture & Water Resources

Federal Secretariat, FCDA
 PMB 135, Area 11
 Garki-Abuja, FCT
 Nigeria
 Tel: (234) 9-314-1931, 314-2405
 Fax: (234) 9-314-2532
 Website: <http://www.nigeria.gov.ng/>

5. Standards Organization of Nigeria (SON)

Plot 13/14 Northern Business District
 Victoria Arobieke Street
 Lekki Peninsula Scheme 1 Lekki, Lagos
 Tel: 234-1-2708247, 2708230-5
 E-mail: info@sononline-ng.org
 Website: www.sononline.org/

Appendix II: Nigeria's Economic Structure (Annual Indicators)

| | 2006** | 2007 | 2008 | 2009 | 2010 |
|---|---------|---------|--------|----------|-----------------------|
| GDP (US\$ bn) | 116.6 | 142.4 | 179.5 | 352.3### | 369.8 |
| Real GDP growth (%) | 5.6** | 6.2* | 11.6* | 5.8** | 6.8 |
| Consumer price inflation (av; %) | 7.5 | 5.4* | 15.1* | 12.4** | 13.9 |
| Population (m) | 144.0 | 146.2* | 152.2 | 154### | 158+ |
| Exports of goods fob (US \$ b) | 58,872 | 61.8 | 76.8 | 48.1** | 76.33 |
| Imports of goods fob (US\$ b) | -27,402 | 38.8 | 45.5 | 31.7** | 34.18 |
| Current account balance (US\$ b) | 1.5 | 2.2 | 2.7 | 11.9** | 27.77 |
| Foreign exchange reserves excluding gold (US\$ m) | 42,277 | 59,700^ | -- | 16,956 | 43.36 (incl. gold) |
| Total external debt (US\$ bn) | 6.5 | 7.8 | 8.3 | 9.7** | 11.02 |
| Debt-service ratio, paid (%) | 1.8 | 3.4 | -- | -- | -- |
| Exchange rate (av.) to US\$ | 127.38 | 125.00* | 118.5* | 150.0 | 150.88 |

Notes: *Actual. ** Economic Intelligence Unit estimates. *** Official Estimates. ##EconoWatch

^ Industry sources. # - CIA estimates. Exchange Rate (2011): \$1:160

Sources: The 2008 figures obtained from Economist Intelligence Unit, Country Report (Nigeria)—May, 2009
 The 2010 figures are estimates from CIA World Factbook, 2011

Appendix II: REFERENCES

1. The GON has finally released the Nigeria Customs and Excise Tariff Book for 2005- 2006. For further information regarding specific tariff lines, contact FAS/Lagos at:

Agricultural Affairs Office, U.S. Consulate General
#2, Walter Carrington Crescent, Victoria Island, Lagos, Nigeria
Tel: 234-1-460.3400, 460-3577 E-mail: aglagos@usda.gov
Website: http://nigeria.usembassy.gov/foreign_agric_service.html

2. The Central Bank of Nigeria (CBN) circular (TED/AD/150/2005) dated December 28, 2005 stated that “in pursuance of the GON’s decision to abolish pre-shipment inspection scheme and the introduction of Destination Inspection Scheme for imports to Nigeria with effect from January 1, 2006, the Government had entered into agreements with three scanning companies that will act as service providers for the effective take-off and operation of the scheme”. The details of each service provider together with the designated zones are outlined below:

COTECNA INSPECTION LIMITED

10, Engineering Close, Off Idowu Taylor Street, Victoria Island, Lagos-Nigeria
Tel: 234-1-4617121/3
E-mail: info@cotecna.com
Contact: Contract Manager
ZONE: Apapa and Tin Can Seaports, Kano and Abuja Airports, Jibiya and Banki Posts.

SOCIETY GENERALE DU SURVEILLANCE (SGS)

Plot 999C, Danmole Street, Intercontinental Plaza, 4th Floor, Victoria Island, Lagos-Nigeria
Tel: 234-1-2623042
E-mail: Philip-bank@sgs.com
Contact: Contract Manager
ZONE: Onne and Port-Harcourt Seaports: Port-Harcourt Airport and Idiroko border post.

GLOBALSCAN SYSTEM LIMITED

5B, Oko-Awo Close, Off Adetokumbo Ademola Street, Victoria Island, Lagos-Nigeria
Tel: 234-1-2625392
Fax: 234-1-2624542
E-mail: globalscansystem@yahoo.com
Contact: Managing Director
ZONE: Warri and Calabar Seaports; Ikeja Airport and Seme Border Post

3. The circular further stated, “Under the new arrangement, Form ‘M’ submission and processing shall be based on the Port of Destination as outline above. For avoidance of doubt, importation shall remain restricted to on the ports listed above”.