**NATIONAL SUGAR DEVELOPMENT COUNCIL**

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**REPORT OF THE ANNUAL SURVEY ON INDUSTRIAL SUGAR CONSUMPTION AND MARKET PRICES IN NIGERIA**

**2016**



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The National Sugar Development Council was established by Decree 88 of 1993, now an Act of the National Assembly, Act Cap. No. 78 LFN of 2004, to catalyze the development of the sugar industry with a view to ensuring that Nigeria attains at least, 70% self-sufficiency in her sugar requirement within the shortest possible time and even export to earn foreign exchange. The Council therefore serves as the main focal agency responsible for the regulation of all activities in the sugar sub-sector ranging from production, marketing, importation and enforcement of relevant industry standards in collaboration with relevant government agencies.

The Council, at the directive of the Presidency in 2010, developed a road-map policy document for the achievement of self-sufficiency in Nigeria’s sugar requirement. The policy document tagged: **“Nigeria Sugar Master Plan” (NSMP);** was approved by the Federal Executive Council in September, 2012 and unveiled to the public in November, 2012 while its implementation commenced on 1st January, 2013.

With the adoption of the Nigeria Sugar Master Plan (NSMP) as a strategic road map for the development of the sector in order to make Nigeria achieve self-sufficiency in local sugar requirement within a 10-year plan period, Nigeria stands to achieve the following:

**NSMP DELIVERABLES**

* 1,797,000 tonnes of sugar annually;
* 161.2 million litres of ethanol annually
* 411.7 MW of electricity annually
* 1.6 million tonnes of animal feeds annually;
* 37,378 permanent jobs;
* 79,803 seasonal jobs;
* US$65.8 million savings in forex on fuel imports annually (E10 mandate); and
* US$350-$500 million savings in forex on sugar imports annually.

**NSMP OBJECTIVES AND STRATEGIES**

 **Objective 1. Raise local sugar production to attain self-sufficiency through;**

i.Robust monitoring and evaluation of Backward Integration Programme

ii. Regulation of the entire regime of sugar importation through quota allocation

iii. Investors specific fiscal incentives to attract investment into the sector

**Objective 2. Stem the tide of high level of importation through;**

i. High graduated tariff structure on sugar importation

ii. Implementation of BIP support incentives and sanctions policy

iii. Import quota allocation benchmarked on local production

**Objective 3. Create huge number of job opportunities through;**

i. Significant increase in cane area and factory milling capacity

ii. Re-invigorating and expanding the out-grower scheme

iii. Enlargement of sugarcane value chain play

**Objective 4. Contribute to the production of ethanol and generation of electricity through;**

i. Development of multipurpose sugarcane varieties

ii. Establishment of Ethanol distilleries at each new sugar project

iii. Designing of all new sugarcane processing plants with high pressure boilers for efficient co-generation

**OUR MANDATE**

The mandate of the Council amongst others includes:

* To articulate policies and programmes that will bring about rapid development of the sugar sector;
* To progressively reduce level of sugar importation through Sugar Quota Administration as the local production increases towards self-sufficiency;
* To encourage greater private sector participation in sugar production through the operation of BIP for existing sugar refineries and green-field sugar projects for new ones;
* To popularize sugar processing technologies as a means of generating employment for skilled and unskilled labour;
* To provide an effective and efficient R and D support that will catalyze developments in the sugar sector.

**THE VISION**

NSDC is committed to making Nigeria a notable player in the global sugar trade through policies and strategies that will harness our abundant natural and material resources to ensure national self-sufficiency in sugar with surplus to export to earn foreign exchange.

**MISSION**

To accelerate the development and growth of the local sugar industry in order to achieve a target of at least 70 percent self-sufficiency in national sugar requirement as soon as possible.

**NSDC CORE VALUES**

The Council has articulated a set of ideals and Core Values to serve as its organizational driving force towards attainment of its overall goal. The Core Values are encapsulated in the acronym which stands for:

* **R = Respect**
* **I = Integrity**
* **D = Discipline**
* **E = Excellence**
* **R = Reliability**

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 **EXECUTIVE SUMMARY**

As part of its statutory functions, the Planning Department of National Sugar Development Council conducted an annual survey on industrial consumption and market price of sugar in Nigeria in 2016. While the industrial sugar consumption survey exercise was carried out in thirty-four (34) states of the Federation including the FCT Abuja, the market price monitoring covered only the major markets at Abuja (FCT), Ilorin (Kwara State), Kano (Kano State), Lagos (Lagos State) and Yola (Adamawa State).

The major objective of the annual exercise is to provide the essential information on both industrial consumption and prices of sugar in Nigeria which could aid effective management decision-making in the process of policy formulation to guide government intervention in the sugar sub-sector of the Nigerian economy as well as investment decision for prospective investors in the sugar industry. The data gathering/collection exercise involves the administration and retrieval of well-structured questionnaires. The survey revealed the pattern or trend of sugar consumption by the various industrial sectors during the year under review.

Some of the major findings from the analysis of the survey are summarized as follows:

1. The trend of industrial sugar consumption during the year under review shows that Soft Drinks sub-sector was still the highest consumer of industrial sugar using 366,710 metric tonnes representing about 33% of total sugar consumption by industries in year 2016. Food and Beverages sector followed with a consumption figure of 290,872 metric tonnes representing about 27% of total sugar consumed by industries during the period of the survey.

The Bakery and Confectionery and Pharmaceutical sub-sectors accounted for sugar consumption figures of 204,267 metric tonnes and 188,220metric tonnes representing 19% and 17% respectively. The least industrial consumer was the Dairy sub-sector which had a consumption figure of 44,917 metric tonnes representing 4% of total industrial sugar consumption during the period of the survey.

1. The survey results also revealed that industries in the Soft Drinks, Pharmaceuticals, Food and Beverages sub-sectors uses alternative sweeteners such as Glucose, Aspartame, Acesulfame K. and Sucralose as raw material in their production processes. Also, the survey reveals the utilization of ethanol as a source of power in the Pharmaceutical, Food and Beverages sectors only.
2. During the period under review, the global sugar prices witnessed an upward movement, except for February which recorded a slightly lower price than January figure for both raw and refined sugar. The price of raw sugar which was USD318.13/ton in January declined to USD294.22/ton in February and then rose to USD338.99/ton in March. The upward price movement continued to October at USD504.61 and later decreased to USD461.46 in November and also increased slightly in December thereby closing the year with USD461.94/ton. Similarly, the global average sugar prices of refined sugar witnessed a slight reduction from USD418.6 in January to USD393.1/ton in February and then increased to a peak of USD597.07 in October before decreasing to USD554.97 in November and further down to USD505.90/ton in December. The price maintains an upward trend rising to a peak of USD597.07 in October before decreasing to USD554.97 in November and then USD505.90/ton in December. The international average prices for both raw and refined sugar during the period were put at USD406.1/ton and USD498.0/ton respectively.
3. Similarly, as witnessed in the international market, the prices of locally refined sugar (wholesale) also gradually moved upward from N8,085.50/50kg bag in January to N9,240/50kg bag in February and N9,460 in March but decrease to N9,200/50kg bag in April and then continued the upward trend to a peak of N19,160 in November to close the year at N18,060/50kg bag in December. The main reason for the astronomical increase in price was due to the increase in foreign exchange rate from N198/US$1.00 between January and May, 2016, to as high as N450/US$1.00 in November/December, 2016. The average local prices for both wholesale and retail stood at N13,046/50kg bag and N13,321/50kg bag respectively in 2016.
4. The survey also showed that all the companies covered obtained their sugar supply locally.

**1.0 INTRODUCTION**

As the focal agency for the sugar sub-sector, the National Sugar Development Council (NSDC) continue with its annual exercise on nationwide information and data gathering through survey which involves administration of structured questionnaires on industrial groups using sugar. This is to ensure that Nigeria as a member country remains up to date in the provision of sugar related data to ISO as envisaged by the International Sugar Agreement (ISA), Article 32 (2) of 1992. The exercise was conducted from February – July 2017 and it covered all the 36 States of the Federation except Borno and Yobe States due to persistent terrorists’ activities in these areas.

The Council also tracks both domestic and international market prices in order to ascertain their trends and understand the underlying dynamics of sugar price variations. The domestic market price monitoring covers the major markets in five (5) major cities across the country namely: Abuja, Kano, Yola, Ilorin and Lagos.

1. **SURVEY OBJECTIVES**

The main objectives of the survey are as follow:

1. To generate reliable statistical data on both sugar prices and consumption by different categories of industries. The data collected include but are not limited to the following:
* Details of sugar consumption by major industrial users in major sectors – Pharmaceuticals, Food and Beverages, Bakery and Confectioneries, Soft Drinks and Dairy among others;
* Details of quantity of sugar consumed by industries in the different Zones and States across the country;
* Average prices at which Nigerian industries buy sugar within the period covered by the survey;
* Average international prices for both raw and refined sugar;
* Average domestic prices of white refined sugar (wholesale and retail);
* Sources of sugar used whether local or imported as well as major suppliers of sugar in Nigeria;
* Use of sugar by-products or other sweeteners by industries in Nigeria and
* Quantity of ethanol used or otherwise by industries in the different Zones and States across the country.

2. To enable Council meet up with the annual responsibility and obligation of providing credible information on the Nigerian sugar industries as required by local and international agencies such as International Sugar Organization (ISO), USAID, F. O. Licht, Federal, States and Local Government Agencies, Private Individuals etc.

3. To provide adequate information for effective management decision making in the process of policy formulation that will guide government intervention in the sugar sub-sector of the Nigerian economy.

1. **SURVEY METHODOLOGY**

3.1 **Coverage/Scope**

The industrial sugar consumption survey covered only thirty four (34) States of the Federation including the Federal Capital Territory (FCT), Abuja. Two States namely: Yobe and Borno were not covered due to persistent insurgency in these States. The market price is monitored on weekly basis at major markets in Lagos, Abuja, Ilorin, Yola and Kano where the Council has its Headquarters and Liaison Offices.

**3.2 Sample Design**

In order to cover major urban cities in the States captured by the survey including the FCT where most of the industrial activities are concentrated, the country was divided into two major zones namely:

* Southern zone; and
* Northern zone.

Due to high concentration of industries in Lagos, the State was further divided into four major areas for an effective coverage. The remaining (15) Southern States were grouped into four sub-zones with each covered by a Planning Officer of the Council. Similarly, Northern zone was sub-divided into four parts based on the numbers of major urban cities as well as number of industries to be covered in the States. This was to enhance effective coverage and supervision of the field enumerators.

**3.3 Survey Instrument**

Principally, the survey instrument adopted in this survey was a well-structured questionnaire designed to capture all the essential data to be collected for analysis. Planning Officers of the Council served as field enumerators that covered various companies, which make use of sugar as raw materials in their production processes in major urban cities, to administer and retrieve the questionnaires.

**3.4 Data Collection**

In the survey questionnaires, respondents (companies) were to indicate the sector they operate, the nature of business and type of products they produce, the source of sugar they use for their operation, whether directly imported or locally sourced, etc.

Respondents were also required to indicate whether there was any specific period within the year that their industries needed higher quantities of sugar more than others, and whether they make use of glucose or other alternative sweeteners as raw materials in their production processes. In order to meet up with the data requirement of several Local and International Organizations the following sectors were covered;

* Bakery and Confectionery;
* Food and Beverages;
* Soft Drinks;
* Pharmaceuticals and
* Dairy amongst others.

Given the fact that not all the companies using sugar could be listed and covered and in order to take care of possible under-declaration of sugar utilized by the companies covered, a 10 per cent margin of error was adopted. Subsequently, the data obtained were processed and analyzed while relevant tables and charts were generated to facilitate proper understanding and dissemination of the information to potential users.

**3.5 Sugar Price Monitoring**

Domestic sugar prices were tracked on a weekly basis at five (5) major local markets in Lagos, Kano, Yola , Ilorin and Abuja where wholesalers and retailers in each market were randomly picked as respondents. For the international price of sugar (raw and refined), the Council has a number of sources at which it tracks prices. These sources include the Public Ledger, ISA Daily Price and Monthly Market Reports and Statistical Bulletin from the International Sugar Organization as well as Ministry of Agriculture, Livestock and Food Supply. The secondary data collected from these sources were collated, analyzed and presented in Tables and charts.

1. **DATA PRESENTATION IN TABLES**

**TABLE 4.1 SUGAR CONSUMPTION BY DIFFERENT INDUSTRIAL SECTOR BY STATES**

|  |  |  |  |
| --- | --- | --- | --- |
| **S/NO** | **STATE** | **SECTOR** | **QUANTITY USED IN METRIC TONNES 2015** |
| 1 | ABIA | PHARMACEUTICALS | 1,270 |
|   |   | FOOD & BEVERAGES | 1,880 |
|   |   | BAKERY & CONFECTIONERY | 2,790 |
|   |   | SOFT DRINKS | 2,340 |
|   |   |  DAIRY AND OTHERS | 158 |
|   |   | **SUB-TOTAL**  | **8,438** |
|   |   |  |  |
| 2 | ADAMAWA | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 4,282 |
|   |   | BAKERY & CONFECTIONERY | 4,367 |
|   |   | SOFT DRINKS | 347 |
|   |   |  DAIRY AND OTHERS | 1,506 |
|   |   | **SUB-TOTAL**  | **10,502** |
|   |   |  |  |
| 3 | AKWA IBOM | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 1,574 |
|   |   | BAKERY & CONFECTIONERY | 2,137 |
|   |   | SOFT DRINKS | 782 |
|   |   |  DAIRY AND OTHERS | 684 |
|   |   | **SUB-TOTAL**  | **5,177** |
|   |   |  |  |
| 4 | ANAMBRA | PHARMACEUTICALS | 9,784 |
|   |   | FOOD & BEVERAGES | 3,661 |
|   |   | BAKERY & CONFECTIONERY | 3,541 |
|   |   | SOFT DRINKS | 5,980 |
|   |   |  DAIRY AND OTHERS | 566 |
|   |   | **SUB-TOTAL**  | **23,532** |
|   |   |   |  |
| 5 | BAUCHI | PHARMACEUTICALS | 0 |
|   |  | FOOD & BEVERAGES | 1,313 |
|   |  | BAKERY & CONFECTIONERY | 3,006 |
|   |  | SOFT DRINKS | 0 |
|   |  |  DAIRY AND OTHERS | 899 |
|   |  | **SUB-TOTAL**  | **5,218** |

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| --- | --- | --- | --- |
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| **S/N** | **STATE** | **SECTOR** | **QUANTITY USED IN METRIC TONNES**  |
| 6 | BAYELSA | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 1,206 |
|   |   | BAKERY & CONFECTIONERY | 1,096 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 308 |
|   |   | **SUB-TOTAL**  | **2,610** |
|   |   |  |  |
| 7 | BENUE | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 4,253 |
|   |   | BAKERY & CONFECTIONERY | 3,490 |
|   |   | SOFT DRINKS | 606 |
|   |   |  DAIRY AND OTHERS | 350 |
|   |   | **SUB-TOTAL**  | **8,699** |
|   |   |  |  |
| 8 | BORNO | PHARMACEUTICALS |  N/A |
|   |   | FOOD & BEVERAGES | N/A |
|   |   | BAKERY & CONFECTIONERY | N/A |
|   |   | SOFT DRINKS | N/A |
|   |   |  DAIRY AND OTHERS | N/A |
|   |   | **SUB-TOTAL**  | **N/A** |
|   |   |  |   |
| 9 | CROSS - | PHARMACEUTICALS | 0 |
|   | RIVER | FOOD & BEVERAGES | 1,700 |
|   |   | BAKERY & CONFECTIONERY | 2,706 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 384 |
|   |   | **SUB-TOTAL**  | **4,790** |
|  |  |  |  |
| 10 | DELTA | PHARMACEUTICALS | 0 |
|  |  | FOOD & BEVERAGES | 1,421 |
|   |   | BAKERY & CONFECTIONERY | 2,211 |
|   |   | SOFT DRINKS | 2,100 |
|   |   |  DAIRY AND OTHERS | 333 |
|   |   | **SUB-TOTAL**  | **6,065** |
|   |   |  |  |

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| --- | --- | --- | --- |
|  **S/N** | **STATE** | **SECTOR** | **QUANTITY USED IN METRIC TONNES 2015**  |
| 11 | EBONYI | PHARMACEUTICALS | 210 |
|   |   | FOOD & BEVERAGES | 1,760 |
|   |   | BAKERY & CONFECTIONERY | 1,342 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 311 |
|   |   | **SUB-TOTAL**  | **3,623** |
|   |   |  |  |
| 12 | EDO | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 1,695 |
|   |   | BAKERY & CONFECTIONERY | 1,840 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 392 |
|   |   | **SUB-TOTAL**  | **3,927** |
|   |   |  |  |
| 13 | EKITI | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 1,108 |
|   |   | BAKERY & CONFECTIONERY | 1,521 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 280 |
|   |   | **SUB-TOTAL**  | **2,909** |
|   |   |   |  |
| 14 | ENUGU | PHARMACEUTICALS | 751 |
|   |   | FOOD & BEVERAGES | 1,305 |
|   |   | BAKERY & CONFECTIONERY | 4,430 |
|   |   | SOFT DRINKS | 6,390 |
|   |   |  DAIRY AND OTHERS | 280 |
|   |   | **SUB-TOTAL**  | **13,156** |
|   |   |  |  |
| 15 | GOMBE | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 890 |
|   |   | BAKERY & CONFECTIONERY | 1,588 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 680 |
|   |   | **SUB-TOTAL**  | **3,158** |
|   |   |  |   |

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| **S/N** | **STATE** | **SECTOR** | **QUANTITY USED IN METRIC TONNES 2015**  |
| 16 | IMO | PHARMACEUTICALS | 1,597 |
|   |   | FOOD & BEVERAGES | 2,922 |
|   |   | BAKERY & CONFECTIONERY | 3,111 |
|   |   | SOFT DRINKS | 6,281 |
|   |   |  DAIRY AND OTHERS | 305 |
|   |   | **SUB-TOTAL**  | **14,216** |
|   |   |  |  |
| 17 | JIGAWA | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 760 |
|   |   | BAKERY & CONFECTIONERY | 2,117 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 451 |
|   |   | **SUB-TOTAL**  | **3,328** |
|   |   |  |  |
| 18 | KADUNA | PHARMACEUTICALS | 1,682 |
|   |   | FOOD & BEVERAGES | 4,268 |
|   |   | BAKERY & CONFECTIONERY | 5,112 |
|   |   | SOFT DRINKS | 5,923 |
|   |   |  DAIRY AND OTHERS | 936 |
|   |   | **SUB-TOTAL**  | **17,921** |
|   |   |   |  |
| 19 | KANO | PHARMACEUTICALS | 1,712 |
|   |   | FOOD & BEVERAGES | 4,721 |
|   |   | BAKERY & CONFECTIONERY | 5,611 |
|   |   | SOFT DRINKS | 5,923 |
|   |   |  DAIRY AND OTHERS | 1,105 |
|   |   | **SUB-TOTAL**  | **19,072** |
|   |   |   |  |
| 20 | KATSINA | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 1,108 |
|   |   | BAKERY & CONFECTIONERY | 1,870 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 912 |
|   |   | **SUB-TOTAL**  | **3,890** |
|   |   |   |   |

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| **S/N** | **STATE** | **SECTOR** | **QUANTITY USED IN METRIC TONNES 2015**  |
| 21 | KEBBI | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 511 |
|   |   | BAKERY & CONFECTIONERY | 1,821 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 510 |
|   |   | **SUB-TOTAL**  | **2,842** |
|   |   |  |  |
| 22 | KOGI | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 718 |
|   |   | BAKERY & CONFECTIONERY | 3,280 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 550 |
|   |   | **SUB-TOTAL**  | **4,548** |
|   |   |  |  |
| 23 | KWARA | PHARMACEUTICALS | 310 |
|   |   | FOOD & BEVERAGES | 2,400 |
|   |   | BAKERY & CONFECTIONERY | 3,302 |
|   |   | SOFT DRINKS | 2,111 |
|   |   |  DAIRY AND OTHERS | 460 |
|   |   | **SUB-TOTAL**  | **8,583** |
|   |   |  |  |
| 24 | LAGOS | PHARMACEUTICALS | 126,005 |
|   |   | FOOD & BEVERAGES | 216,810 |
|   |   | BAKERY & CONFECTIONERY | 102,024 |
|   |   | SOFT DRINKS | 240,105 |
|   |   |  DAIRY AND OTHERS | 23,150 |
|   |   | **SUB-TOTAL**  | **708,094** |
|   |   |   |  |
| 25 | NASARAWA | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 812 |
|   |   | BAKERY & CONFECTIONERY | 2,998 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 605 |
|   |   | **SUB-TOTAL**  | **4,415** |
|   |   |  |  |

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|  **S/N** | **STATE** | **SECTOR** | **QUANTITY USED IN METRIC TONNES 2015**  |
| 26 | NIGER | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 1,212 |
|   |   | BAKERY & CONFECTIONERY | 2,790 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 486 |
|   |   | **SUB-TOTAL**  | **4,488** |
|   |   |  |  |
| 27 | OGUN | PHARMACEUTICALS | 29,881 |
|   |   | FOOD & BEVERAGES | 6,632 |
|   |   | BAKERY & CONFECTIONERY | 7,060 |
|   |   | SOFT DRINKS | 58,960 |
|   |   |  DAIRY AND OTHERS | 1,748 |
|   |   | **SUB-TOTAL**  | **104,281** |
|   |   |  |  |
| 28 | ONDO | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 1,266 |
|   |   | BAKERY & CONFECTIONERY | 2,178 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 288 |
|   |   | **SUB-TOTAL**  | **3,732** |
|   |   |   |  |
| 29 | OSUN | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 956 |
|   |   | BAKERY & CONFECTIONERY | 1,738 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 188 |
|   |   | **SUB-TOTAL**  | **2,882** |
|   |   |   |  |
| 30 | OYO | PHARMACEUTICALS | 14,960 |
|   |   | FOOD & BEVERAGES | 10,350 |
|   |   | BAKERY & CONFECTIONERY | 8,343 |
|   |   | SOFT DRINKS | 17,290 |
|   |   |  DAIRY AND OTHERS | 511 |
|   |   | **SUB-TOTAL**  | **51,454** |
|   |   |  |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **S/N** | **STATE** | **SECTOR** | **QUANTITY USED IN METRIC TONNES 2015**  |
| 31 | PLATEAU | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 1,670 |
|   |   | BAKERY & CONFECTIONERY | 1,581 |
|   |   | SOFT DRINKS | 560 |
|   |   |  DAIRY AND OTHERS | 285 |
|   |   | **SUB-TOTAL**  | **4,096** |
|   |   |  |  |
| 32 | RIVERS | PHARMACEUTICALS | 1,960 |
|   |   | FOOD & BEVERAGES | 4,231 |
|   |   | BAKERY & CONFECTIONERY | 3,127 |
|   |   | SOFT DRINKS | 4,915 |
|   |   |  DAIRY AND OTHERS | 330 |
|   |   | **SUB-TOTAL**  | **14,563** |
|   |   |  |  |
| 33 | SOKOTO | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 0 |
|   |   | BAKERY & CONFECTIONERY | 2,411 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 621 |
|   |   | **SUB-TOTAL**  | **3,032** |
|   |   |   |  |
| 34 | TARABA | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 0 |
|   |   | BAKERY & CONFECTIONERY | 2,166 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 353 |
|   |   | **SUB-TOTAL**  | **2,519** |
|   |   |   |   |
| 35 | YOBE | PHARMACEUTICALS |  N/A |
|   |   | FOOD & BEVERAGES |  N/A |
|   |   | BAKERY & CONFECTIONERY | N/A |
|   |   | SOFT DRINKS | N/A |
|   |   |  DAIRY AND OTHERS | N/A |
|   |   | **SUB-TOTAL**  | **N/A** |
|   |   |  |   |

|  |
| --- |
| QUANTITY USED IN METRIC TONNES |
| **S/N** | **STATE** | **SECTOR** | **2015** |
| 36 | ZAMFARA | PHARMACEUTICALS | 0 |
|   |   | FOOD & BEVERAGES | 0 |
|   |   | BAKERY & CONFECTIONERY | 1,858 |
|   |   | SOFT DRINKS | 0 |
|   |   |  DAIRY AND OTHERS | 408 |
|   |   | **SUB-TOTAL**  | **2,266** |
|   |   |  |  |
| 37 | ABUJA FCT | PHARMACEUTICALS | 98 |
|   |   | FOOD & BEVERAGES | 1,486 |
|   |   | BAKERY & CONFECTIONERY | 3,704 |
|   |   | SOFT DRINKS | 5,821 |
|   |   |  DAIRY AND OTHERS | 585 |
|   |   | **SUB-TOTAL**  | **11,694** |
|   |   |  |  |
|   |   | **GRAND TOTAL** | **1,093,720** |

**TABLE 4.2 NATIONAL INDUSTRIAL SUGAR CONSUMPTION BY SECTORS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **SECTOR** |  |  | **QUANTITY USED IN (MT)** |
| 1 | PHARMACEUTICAL |  | 190,220 |
| 2 | FOOD AND BEVERAGES | 290,881 |
| 3 | BAKERY AND CONFECTIONERY | 204,267 |
| 4 | SOFT DRINKS |  | 366,434 |
| 5 | DAIRY AMONG OTHERS | 41,918 |
|  | **GRAND**  |  | **TOTAL** | **1,093,720** |

**TABLE 4.3 VOLUME OF ETHANOL USED BY INDUSTRIAL SECTORS**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
|  | **SECTOR** |  |  | **VOLUME USED IN LITRES** |
| 1 | PHARMACEUTICAL  |  | 379,000 |
| 2 | FOOD AND BEVERAGES  | 997,890  |
|  | **GRAND TOTAL**  | **1,376,890** |

**TABLE 4.4 TOTAL INDUSTRIAL SUGAR CONSUMPTION IN NIGERIA BY STATES**

|  |  |  |
| --- | --- | --- |
| **S/NO** | **STATE** | **QUANTITY USED IN (MT)** |
| 1 | ABIA | 8,438 |
| 2 | ADAMAWA | 10,502 |
| 3 | AKWA IBOM | 5,177 |
| 4 | ANAMBRA | 23,532 |
| 5 | BAUCHI | 5,218 |
| 6 | BAYELSA | 2,610 |
| 7 | BENUE | 8,699 |
| 8 | BORNO | N/A |
| 9 | CROSS RIVER | 4,790 |
| 10 | DELTA | 6,065 |
| 11 | EBONYI | 3,623 |
| 12 | EDO | 3,927 |
| 13 | EKITI | 2,909 |
| 14 | ENUGU | 13,156 |
| 15 | GOMBE | 3,158 |
| 16 | IMO | 14,216 |
| 17 | JIGAWA | 3,328 |
| 18 | KADUNA | 17,921 |
| 19 | KANO | 19,072 |
| 20 | KATSINA | 3,890 |
| 21 | KEBBI | 2,842 |
| 22 | KOGI | 4,548 |
| 23 | KWARA | 8,583 |
| 24 | LAGOS | 708,094 |
| 25 | NASSARAWA | 4,415 |
| 26 | NIGER | 4,488 |
| 27 | OGUN | 104,281 |
| 28 | ONDO | 3,732 |
| 29 | OSUN | 2,882 |
| 30 | OYO | 51,454 |
| 31 | PLATEAU | 4,096 |
| 32 | RIVERS | 14,563 |
| 33 | SOKOTO | 3,032 |
| 34 | TARABA | 2,519 |
| 35 | YOBE | N/A |
| 36 | ZAMFARA | 2,266 |
| 37  | FCT ABUJA | 11,694 |  | **TOTAL** |  |
|  | **TOTAL** | **1,093,720** |

**TABLE 4.5 RANKING OF STATES BY INDUSTRIAL SUGAR USAGE**

|  |  |  |
| --- | --- | --- |
| **S/No** | **STATE**  | **QUANTITY USED (METRIC TONNES)**  |
| 1 | LAGOS | 708,094 |
| 2 | OGUN | 104,281 |
| 3 | OYO | 51,454 |
| 4 | ANAMBRA | 23,532 |
| 5 | KANO | 19,072 |
| 6 | KADUNA | 17,921 |
| 7 | RIVERS | 14,563 |
| 8 | IMO | 14,216 |
| 9 | ENUGU | 13,156 |
| 10 | FCT ABUJA | 11,694 |
| 11 | ADAMAWA | 10,502 |
| 12 | BENUE | 8,699 |
| 13 | KWARA | 8,583  |
| 14 | ABIA | 8,438 |
| 15 | DELTA | 6,065 |
| 16 | BAUCHI | 5,218 |
| 17 | AKWA IBOM | 5,177 |
| 18 | CROSS RIVER | 4,790 |
| 19 | KOGI | 4,548 |
| 20 | NIGER | 4,488 |
| 21 | NASSARAWA | 4,415 |
| 22 | PLATEAU | 4,096 |
| 23 | EDO  | 3,927 |
| 24 | KATSINA | 3,890 |
| 25 | ONDO | 3,732 |
| 26 | EBONYI | 3,623 |
| 27 | JIGAWA | 3,328 |
| 28 | GOMBE | 3,158 |
| 29 | SOKOTO | 3,032 |
| 30 | EKITI | 2,909 |
| 31 | OSUN | 2,882 |
| 32 | KEBBI | 2,842 |
| 33 | BAYELSA | 2,610 |
| 34 | TARABA | 2,519 |
| 35 | ZAMFARA | 2,266 |
| 36 | BORNO | N/A |
| 37 | YOBE | N/A |
|  | **TOTAL** | **1,093,720** |

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **TABLE 4.6 SECTORAL CLASSIFICATION OF INDUSTRIAL SUGAR CONSUMPTION BY STATES**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **STATE** | **PHARM.** | **FOOD & BEVERAGES** | **BAKERY & CONF.** | **SOFT DRINKS** | **DAIRY** | **TOTAL** |
| **(MT)** |
| ABIA | 1,270 | 1,880 | 2,790 | 2,340 | 158 | **8,438** |
| ADAMAWA | 0 | 4,282 | 4,367 | 347 | 1,507 | **10,502** |
| AKWA IBOM | 0 | 1,574 | 2,137 | 782 | 684 | **5,177** |
| ANAMBRA | 7,784 | 3,661 | 3,541 | 5,980 | 566 | **23,532** |
| BAUCHI | 0 | 1,313 | 3,006 | 0 | 899 | **5,218** |
| BAYELSA | 0 | 1,206 | 1,096 | 0 | 308 | **2,610** |
| BENUE | 0 | 4,253 | 3,490 | 606 | 350 | **8,699** |
| BORNO | NIL | NIL | NIL | NIL | NIL | **NIL** |
| C/RIVER | 0 | 1,700 | 2,706 | 0 | 384 | **4,790** |
| DELTA | 0 | 1,421 | 2,211 | 2,100 | 333 | **6,065** |
| EBONYI | 210 | 1,760 | 1,342 | 0 | 311 | **3,623** |
| EDO | 0 | 1,695 | 1,840 | 0 | 392 | **3,927** |
| EKITI | 0 | 1,108 | 1,521 | 0 | 280 | **2,909** |
| ENUGU | 751 | 1,305 | 4,430 | 6,390 | 280 | **13,156** |
| GOMBE | 0 | 890 | 1,588 | 0 | 680 | **3,158** |
| IMO | 1,597 | 2,922 | 3,111 | 6281 | 305 | **14,216** |
| JIGAWA | 0 | 760 | 2,117 | 0 | 760 | **3,328** |
| KADUNA | 1,682 | 4,268 | 5,112 | 5,923 | 936 | **17,921** |
| KANO | 1,712 | 4,712 | 5,611 | 5,923 | 1,105 | **19.072** |
| KATSINA | 0 | 1,108 | 1,870 | 0 | 912 | **3,890** |
| KEBBI | 0 | 511 | 1,821 | 0 | 510 | **2,842** |
| KOGI | 0 | 718 | 3,280 | 0 | 550 | **4,548** |
| KWARA | 310 | 2,400 | 3,302 | 2,111 | 460 | **8,582** |
| LAGOS | 126,005 | 216,810 | 102,024 | 240,105 | 23,150 | **708,094** |
| NASSARAWA | 0 | 812 | 2,998 | 0 | 605 | **4,415** |
| NIGER | 0 | 1,212 | 2,790 | 0 | 486 | **4,488** |
| OGUN | 29,881 | 6,632 | 7,060 | 58,960 | 1,748 | **104,281** |
| ONDO | 0 | 1,266 | 2,178 | 0 | 288 | **3,732** |
| OSUN | 0 | 956 | 1,738 | 0 | 188 | **2,882** |
| OYO | 14,960 | 10,350 | 8,343 | 17,290 | 511 | **51,454** |
| PLATEAU | 0 | 1670 | 1,581 | 560 | 285 | **4,096** |
| RIVERS | 1,960 | 4,231 | 3,127 | 4,915 | 330 | **14,563** |
| SOKOTO | 0 | 0 | 2,411 | 0 | 621 | **3,032** |
| TARABA | 0 | 0 | 2,166 | 0 | 353 | **2,519** |
| YOBE | NIL | NIL | NIL | NIL | NIL | **NIL** |
| ZAMFARA | 0 | 0 | 1,858 | 0 | 408 | **2,266** |
| FCT ABUJA | 98 | 1,486 | 3,704 | 5,821 | 585 | **11,694** |
| **TOTAL** | **188,220** | **290,872** | **204,267** | **366,4334** | **43,917** | **1,093,720** |

 |

**TABLE 4.7 ALTERNATIVE SWEETNERS CONSUMED BY DIFFERENT INDUSTRIAL SECTORS**

|  |  |  |  |
| --- | --- | --- | --- |
| **SECTOR** | **NAME OF SWEETNER** | **QUANTITY USED (KG)** | **PRICE (N)/KG** |
| PHARMACEUTICALS | GLUCOSE  | 6,008 | N/A |
|  | ASPERTAME | 5,910 | N/A |
| FOOD & BEVERAGES | GLUCOSE  | 0  | N/A |
|  | ACESULFAMME K. | N/A | N/A |
|  | SUCRALOSE | N/A | N/A |
| SOFT DRINKS | ASPERTAME  | 140 | N/A |
|  | SUCRALOSE | N/A | N/A |
| **TOTAL**  |  | **12,058** |  |

The total quantity of sugar consumed in each State on sectoral basis is presented in Table 4.1 while Table 4.2 represents computation of National Industrial Sugar Consumption in the country on sectoral basis in 2016. Table 4.3 represents the volume of ethanol used by industrial sectors; Table 4.4 is the quantity of sugar consumed on State by State basis. The data obtained from the thirty-four (34) States of the Federation including the Federal Capital Territory, Abuja covered in the survey were presented in chronological order and is presented in Table 4.5. According to the result, Table 4.6 shows the sectoral classification of industrial sugar consumption by States while Table 4.7 represents the quantities of alternative sweeteners namely: Glucose, Aspertame, Acesulfamme K Sucralose etc. used by different industrial sectors.

From Table 4.2, the Soft Drinks sub-sector accounted for the highest consumption of sugar. The sector consumed (366,710 or 33%) metric tons of sugar, followed by the Food and Beverages sub-sector which had (290,872 or 27%) metric tons of industrial sugar usage. Bakery/Confectionery and Pharmaceutical sectors accounted for (204,267or 19%) and (188,220 or 17%) metric tons respectively. The sector that consumed the least is Dairy which accounted for only (43,917) metric tons representing just 4% of total sugar consumed by industries during the period under review.

As revealed by the survey, Five (5) top industrial sugar consuming states during the period are as listed below:

**Table 4.8 Five Top Industrial Sugar Consuming States**

|  |  |  |  |
| --- | --- | --- | --- |
| **Ranking** | **States**  | **Qty (MT)** | **% Usage** |
| 1st  | LAGOS | 708,094 | 64.7% |
| 2nd  | OGUN | 104,281 | 10.4% |
| 3rd  | OYO | 51,014 | 4.7% |
| 4th  | ANAMBRA | 23,532 | 2.1% |
| 5th  | KANO | 19, 072 | 1.7% |

Furthermore, five least industrial sugars consuming States as revealed by the survey were as listed below:

**Table 4.9 Five Least Industrial Sugar Consuming States**

|  |  |  |  |
| --- | --- | --- | --- |
| **Ranking** | **States**  | **Qty (MT)** | **% Usage** |
| 1st  | OSUN | 2,882 | 0.26% |
| 2nd  | KEBBI | 2,842 | 0.25% |
| 3rd  | BAYELSA | 2,610 | 0.24% |
| 4th  | TARABA | 2,519 | 0.23% |
| 5th  | ZAMFARA | 2,266 | 0.20% |

The result in most cases is a barometer or indicator of the level of industrialization of the States concerned. For instance, Lagos State which recorded the highest quantity of sugar consumption is still indisputably, the most industrialized State in Nigeria. Two States namely; Yobe and Borno were not covered due to security challenges in these States. **5.0 DATA PRESENTATION IN CHARTS**

**FIG. 5.3 PIE CHART SHOWING SUGAR CONSUMPTION IN PERCENTAGES BY INDUSTRIAL SUB –SECTORS**

**FIG.5.4 BARCHART SHOWING INDUSTRIAL SUGAR USAGE BY STATES**

**6.0 DOMESTIC AND INTERNATIONAL MARKET PRICE MONITORING**

In order to meet up with its statutory obligation in providing the general public with current sugar prices, the Council continued with market price monitoring in five (5) major cities in Nigeria namely; Abuja, Lagos, Kano, Yola and Ilorin where Council has Zonal Offices. The NSDC usually monitor prices on weekly basis through random selection of wholesalers and retailers in each market to obtain sugar prices.

The international sugar prices of raw and refined sugar were monitored daily from various sources including the Public Ledger, ISA Daily Price and Monthly Market Reports and Statistical Bulletin from the International Sugar Organization. The monthly and annual average prices are also collated and posted on the Council’s website and published in the Sugar News, a Quarterly Newsletter of the National Sugar Development Council (NSDC). The Monitoring of sugar price movement also helps Council initiate policy intervention as required.

**TABLE 6.1 MONTHLY AVERAGE PRICES OF SUGAR N/50KG BAG IN LOCAL MARKET**

|  |  |  |
| --- | --- | --- |
| MONTH | WHOLESALE N/50KG | RETAIL N/50KG |
| JANUARY | 8085.5 | 8307.5 |
| FEBURARY | 9240 | 9620 |
| MARCH | 9460 | 9640 |
| APRIL | 9200 | 9340 |
| MAY | 9490 | 9625 |
| JUNE | 11610 | 11810 |
| JULY | 13622 | 13810 |
| AUGUST | 14860 | 15080 |
| SEPTEMBER | 15280 | 15740 |
| OCTOBER | 18490 | 18895 |
| NOVEMBER | 19160 | 19445 |
| DECEMBER | 18060 | 18540 |
| **AVERAGE** |  **13046** | **13321** |

**TABLE 6.2 INTERNATIONAL MONTHLY AVERAGE SUGAR PRICES IN USD/MT**

|  |  |  |
| --- | --- | --- |
| MONTH | **RAW SUGAR $/MT** | **WHITE SUGAR $/MT** |
| JANUARY | 312.13 | 418.6 |
| FEBURARY | 294.22 | 393.1 |
| MARCH | 338.99 | 436.8 |
| APRIL | 333.33 | 440.58 |
| MAY | 371.31 | 478.27 |
| JUNE | 417.76 | 518.75 |
| JULY | 481.84 | 539.4 |
| AUGUST | 429.04 | 529.86 |
| SEPTEMBER | 466.73 | 562.06 |
| OCTOBER | 504.61 | 597.07 |
| NOVEMBER | 461.46 | 554.97 |
| DECEMBER | 461.94 | 505.9 |
| **AVERAGE** | **406.1** | **498** |

During the period under review, the global sugar prices witnessed an upward movement for most part of the year, although a slight decrease was recorded for the prices of both raw and refined sugar from January to February, and from October to December. Starting with USD318.13/ton in January and declining to USD294.22/ton in February for raw sugar, the price rose to USD338.99/ton in March and continued on the upward scale to October thereby closing the year with USD461.94/ton in December. Similarly, the global average sugar prices of refined sugar witnessed a slight decrease in the month of February being USD393.1/ton compared to USD418.6/ton in January and subsequently rising to USD 436.8/ton in March. The price maintains an upward trend rising to USD597.07/ton in October before decreasing to USD557.97/ton in November and then USD505.90/ton in December. The ***international average prices for both raw and refined sugar*** during the period ***were put at USD406.1/ton and USD498.0/ton*** respectively.

Similarly, as witnessed in the international market, the prices of locally refined sugar (Wholesale) also gradually moved upward from N8,085.50/50kg bag in January to N9,240/50kg bag in February and decreasing to N9,200/50kg bag in April. The price continued the upward trend to November being N19,160/50kg bag before a slight decrease to close the year at N18,060/50kg bag in December. The ***average local prices for both wholesale and retail*** ***stood at N13,046/50kg bag and N13,321/50kg bag*** respectively in 2016.

**CONCLUSION**

With the successful completion of the survey on industrial sugar consumption and market price monitoring in Nigeria, a fairly reliable data on the nation’s industrial sugar consumption pattern as well as the domestic and international sugar prices for the period have been obtained. This information will go into our databank and shall also be posted on our website as usual. The data are now available for planning purposes and policy articulation. It is also available for investors wishing to go into the sugar sub-sector who may need information on both the level of industrial consumption by different sectors and sale prices for investment planning and forecasting purposes.

We wish to thank the Executive Secretary and Management for approving the necessary funds for the execution of the survey. The efforts and dedication of the Policy, Planning, Research and Statistics Department Staff who participated in the various data gathering and analysis are commendable as well.

Finally, we wish to express the Council’s appreciation to the industrial sector, sugar users and traders especially companies and organizations that responded to our questionnaires. Without their inputs, this exercise would not have been possible.

**POLICY, PLANNING, RESEARCH**

**AND STATISTICS DEPARTMENT**

**SEPTEMBER, 2017**

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