FEED THE FUTURE
The U.S. Government's Global Hunger & Food Security Initiative

Technical report

Regional workshop to review and validate data on import procedures, logistics costs, and fertilizer statistics from 2015 - 2020

Benin | Niger | Togo

Cotonou, Benin | 24 – 26 August 2021

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I. Context

One major challenge in the ECOWAS region is to achieve food security. To achieve this, the region must increase its agricultural production to feed its population. In the international context of global warming and reduction of arable land, this increase in production, if it is to be effective, must necessarily involve an increase in the productivity of small-scale farmers. Thus, the use of adequate quantities of fertilizers is now an absolute necessity. However, fertilizer consumption in the various ECOWAS countries remains low.

In response, IFDC, in partnership with AfricaFertilizer.org and the West African Fertilizer Association (WAFA), through its USAID-funded Feed The Future EnGRAIS project, is conducting and supporting studies to collect information on fertilizer volumes, logistics procedures, and operations, as well as the cost of fertilizer consumption in the region. The purpose of these studies is to transmit information from the sector and propose recommendations to political and economic decision-makers to improve fertilizer supply and enable greater consumption.

Since its inception in 2018, EnGRAIS has been supporting the holding of the Fertilizer Technical Working Groups (FTWG) annual meetings to validate statistics in 6 countries (Burkina-Faso, Côte d'Ivoire, Ghana, Mali, Nigeria, Senegal) that account for between 70-80% of the fertilizer volumes consumed in the region.

Similarly, EnGRAIS organized a study in 2019 on logistics procedures and operations as well as the cost structure of fertilizers in 6 countries (Burkina-Faso, Côte d'Ivoire, Ghana, Mali, Senegal, Togo) in the area supplied by 4 ports (Abidjan, Dakar, Lomé and Tema ports). This study identified constraints and developed powerful decision support tools, such as a cost simulator, with a version under development that will include information from Benin, Niger, and Nigeria. Similarly, annual reviews of statistics have so far omitted Benin, Niger, and Togo, even though fertilizer consumption in these countries indicates a significant increase.

It is in this context that this workshop was jointly organized by the EnGRAIS project, the AfricaFertilizer.org initiative, the West African Fertilizer Association (WAFA), with the support of the PARSEN project (Projet d'Appui à la Réforme du Secteur des Fertilis au Niger, financed by the Millennium Challenge Corporation and implemented by IFDC), and the logistical and administrative support of the IFDC office in Benin. It aims to validate the information collected on fertilizer volumes, import procedures, and cost structure and to obtain recommendations for improving fertilizer volumes and prices in Togo, Benin, and Niger. The results of the workshop provide more accurate data from the three participating countries and give a more complete picture of the fertilizer situation in the region and the potential logistical levers for improving fertilizer consumption.

The BAOBAB conference room of NOVOTEL Orisha in Cotonou hosted the workshop, which was held on August 24, 25, and 26, 2021 in Benin.

II. Participation

The workshop was attended by about 30 public and private sector actors from Togo, Benin, and Niger. Public stakeholders included the National Directorates of Agriculture and their departments in charge of fertilizer, Customs, Statistics, and the Autonomous Port of Cotonou. Private actors included fertilizer importers, manufacturers, and

transporters operating in these three countries. Among the private actors, it is worth noting the participation of the National Association of Fertilizer Importers and Distributors in Niger (ANIDE), which also represented WAFA.

The IFDC country representative in Benin as well as two members of the PARSEN project also participated.

There were 9 organizers, including 4 members of the EnGRAIS Project, 2 members of AfricaFertilizer.org, 2 interns, and the consultant hired by the EnGRAIS Project to collect information in Benin and prepare for this workshop.

III. Opening Ceremony

Mr. Patrice ANNEQUIN, Team Leader of EnGRAIS Component 1 in charge of the private sector launched the workshop by inviting the country representatives as well as the IFDC representative in Benin to take the floor. Responding to this invitation, Mr. Dzunyo EKLOU from Togo, Dr. Garba YAHAYA from Niger, Mr. Dossa AGUEMON from Benin, and Mrs. Françoise LEMA SAYI from IFDC Benin took the floor in turns. They all noted the importance of having reliable data of the agriculture sector in the 3 countries and thanked USAID and IFDC for making this possible.

Photo 1 Opening ceremony of the workshop

From left to right:
Dzunyo EKLOU (Togo),

Françoise LEMA SAYI (IFDC Benin),

Dossa AGUEMON (Benin),

Dr Garba YAHAYA (Niger),

Patrice ANNEQUIN (IFDC-EnGRAIS)

The Director-General of Agriculture of Niger, Dr. Garba YAHAYA, emphasized how useful this workshop would be for his country which is currently in full transition for the privatization of the fertilizer sector with encouraging results despite the current difficult situation facing the sector. As such, he noted that in Niger where the annual fertilizer consumption was usually around 20,000 tons, would have reached 70,000 tons at mid-season this year despite fertilizer price increase on the international market. Thus, a better understanding of the cost structure of fertilizers could allow his country to better support the private sector for better results.

Mrs. Françoise LEMA SAYI, the IFDC country representative in Benin, presented the goal of the workshop and the expected results before concluding with some words of thanks.

To close, the Director of Cabinet of the Ministry of Agriculture, Livestock and Fisheries of Benin, Dr. Dossa AGUEMON, representing the Minister, welcomed the participants in his country and thanked them for having chosen Benin for this meeting. He urged the participants from Benin in general and particularly those from his department to spare no effort for the success of the workshop.

Following the speeches, the participants introduced themselves. Afterward, Mr. Patrice ANNEQUIN presented the context of the workshop, the objectives, the expected results as well as the agenda for the 3 days.

This last presentation marked the end of the opening ceremony, which was followed by a coffee break and a group photo.

Photo 2 Overview of the participants

IV. Presentation of the context and the Methodology

In the presentations that followed the break, the organizers provided more specific details on the context in which the workshop was taking place. Mr. Annequin presented the institutional framework and the global situation of the fertilizer sector. Mr. Goulivas followed with a brief overview of fertilizer consumption in the 6 countries usually studied by AfricaFertilizer. Ms. M'Bahia concluded this segment by presenting the main results of the first phase of the cost structure study, conducted in 6 countries in the western part of the ECOWAS zone.

1. Institutional Framework and Global Context

In his presentation, Mr. Annequin introduced IFDC, the EnGRAIS project, and the AfricaFertilizer.org initiative. He presented IFDC's vision for healthier soils and plants, food security, and an environmentally sustainable world. He also enlightened his audience on IFDC's areas of intervention, which are not limited to fertilizers but encompass all activities in the agricultural value chains. Thus, some IFDC projects are

related to livestock production or market access, in addition to projects on plant nutrition and integrated soil fertility management. The Fertilizer Project is a 5-year project funded by USAID with the objective of increasing fertilizer use in ECOWAS. To achieve this objective, the EnGRAIS Project has 3 main components and key partners for each of them. The first component involves private sector development with the West African Fertilizer Association (WAFA) as the main partner. The second component aims at the development and dissemination of agricultural input packages, in collaboration with CORAF. The third component focuses on the regulation of the fertilizer sector with ECOWAS and the regulatory bodies of member countries as major partners. The AfricaFertilizer.org initiative aims to make available technical and market information on the fertilizer sector. AfricaFertilizer.org produces an annual report on fertilizer consumption in the countries covered by the initiative and publishes a monthly newsletter *Actu-Engrais* where the fertilizer market situation is reported with key events and prices in selected markets. In addition to the institutional framework, Mr. Annequin presented the current situation of the international fertilizer market, marked by soaring prices that have strongly impacted supplies to ECOWAS countries for this agricultural season.

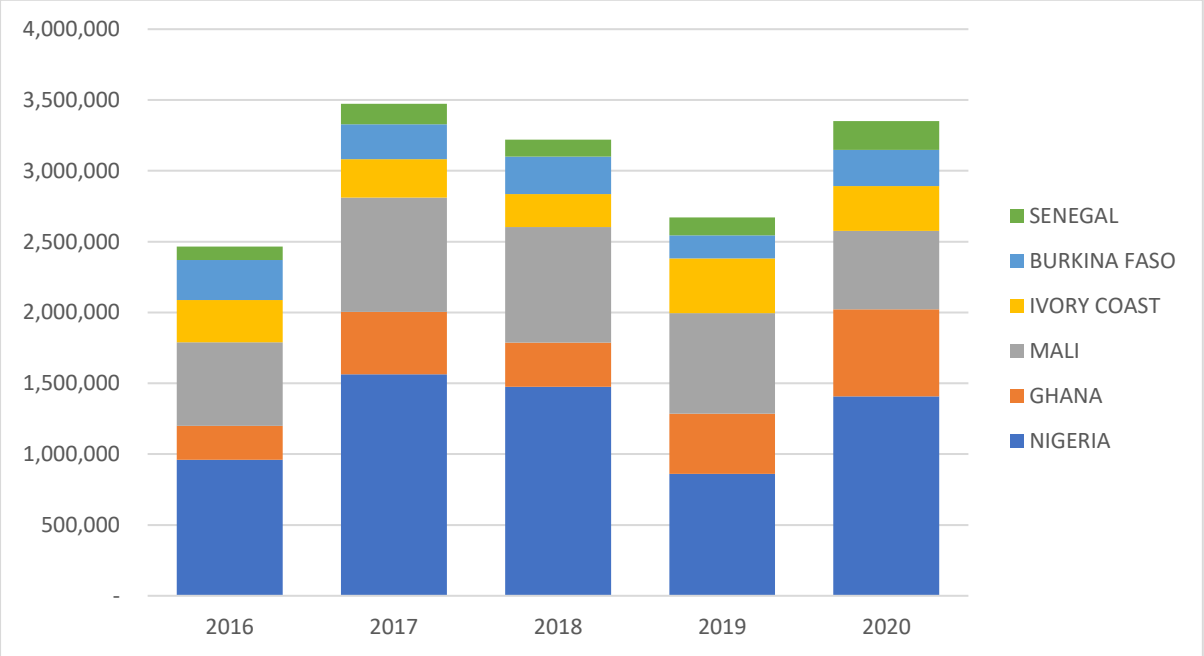
At the request of some participants, Mr. Annequin explained that this increase was due in part to the high demand for fertilizer from agricultural producers in countries such as the USA and Brazil, who are guaranteed high prices for their corn and soybean crops. Another cause was the limited supply. Faced with these situations, West Africa, whose market represents about 1% of the world fertilizer market and whose farmers have no guarantee of prices for their agricultural products, is at a serious disadvantage. Reacting to this presentation, a participant from Niger urged the EnGRAIS project to find a way to inform Nigerien decision-makers about this situation. Indeed, these fertilizer price increases have coincided with the liberalization of the sector in Niger, leading some uninformed voices to blame the private sector for the high prices.

2. Presentation of the role of WGTE and Fertilizer Consumption in 6 Countries

Mr. Goulivas then presented the review of fertilizer statistics in West Africa from 2010 to 2020. These fertilizer statistics are the product of ten years of organizing Fertilizer Statistics Validation Workshops by the Fertilizer Technical Working Groups (FTWG). These FTWG workshops were established by AfricaFertilizer.org with support from the International Fertilizer Association (IFA), the Africa Fertilizer and Agribusiness Partnership (AFAP), and a partnership with the Food and Agriculture Organization of the United Nations (FAO) through its CountrySTAT program. In West Africa, AfricaFertilizer.org and the EnGRAIS project have been collaborating with the West African Fertilizer Association (WAFA) for the past 4 years and jointly organizing annual FTWG workshops for at least 6 countries (Burkina Faso, Côte d'Ivoire, Ghana, Mali, Nigeria, Senegal). The results of the FTWG are used to produce and update reports, country fact sheets, and the West Africa Fertilizer Trade Information Guide (WAFTIG). They are also used and presented at the various editions of the West Africa Fertilizer Forum (WAFF). In 2020, the 6 countries (Burkina Faso, Côte d'Ivoire, Ghana, Mali, Nigeria, Senegal) consumed more than 3.3 million tons, an increase of 24% compared to 2019. The high consumption in 2020 is explained by the interventions of the states as part of the measures taken to mitigate the effects of Covid-19 on food security. The

volumes of fertilizer consumed at the regional level are between 4 and 4.5 million tons on average per year, or 17 kg/year of nutrients per ha of arable land, which is beyond the 50 kg/ha/year target. It was therefore recommended that these FTWG be held in Benin, Niger, and Togo this year to get a more accurate picture of fertilizer consumption in the subregion.

Chart 1 Apparent fertilizer consumption for 6 countries from 2016 to 2020 (in tons of products)



3. Presentation of the 2019 Fertilizer Cost Structure Study

In 2019, a study on the costs of logistics operations and import procedures was conducted by the EnGRAIS project for corridors involving 6 countries (Burkina-Faso, Cote d'Ivoire, Ghana, Mali, Senegal, and Togo). The results of this study were presented by Olive M'Bahia, SRC of EnGRAIS, who showed interest in extending it to Benin and Niger for a better representation within the region. This study made it possible to establish descriptive sheets for each port studied and a map of import procedures. It also made it possible to develop a cost simulator listing the details of logistics operations and their costs according to the corridors and the type of fertilizer. This is a decision support tool for private sector actors and will allow other actors in the sector to have a general knowledge of operations and their costs. A demonstration of this tool was given by Kido Kouassi, SRC of EnGRAIS.

Following this presentation, questions were mainly focused on the inclusion of fertilizers from parallel networks in the cost simulator, as our porous borders facilitate uncontrolled movements of goods. It was answered that the parameterizable data of the cost simulator allow making these simulations (for example, by hiding the port formalities in the case of fertilizers transiting without passing through the port).

It was asked if IFDC has set up a study presenting the evolution of logistics costs in the region over several years as is often the case for raw material prices. Mr. Annequin pointed out that raw material prices represent more than 50% of the final price of

fertilizer to producers, which is why IFDC is looking into this issue to inform the players. Regarding the logistics operations themselves, the costs and procedures do not vary significantly from one year to the next, justifying that these studies are generally re-evaluated every 3 to 5 years. However, recommendations from this workshop may facilitate advocacy for the improvement of logistics procedures.

V. A visit to the Autonomous Port of Cotonou (Tuesday, August 24)

The session immediately following the presentation of the context of the workshop was a guided tour of the Port of Cotonou led by the representative of the Commercial Directorate of the Port, Mr. Marius GLELE who also participated in the workshop.

Photo 3 Visit to the Autonomous Port of Cotonou

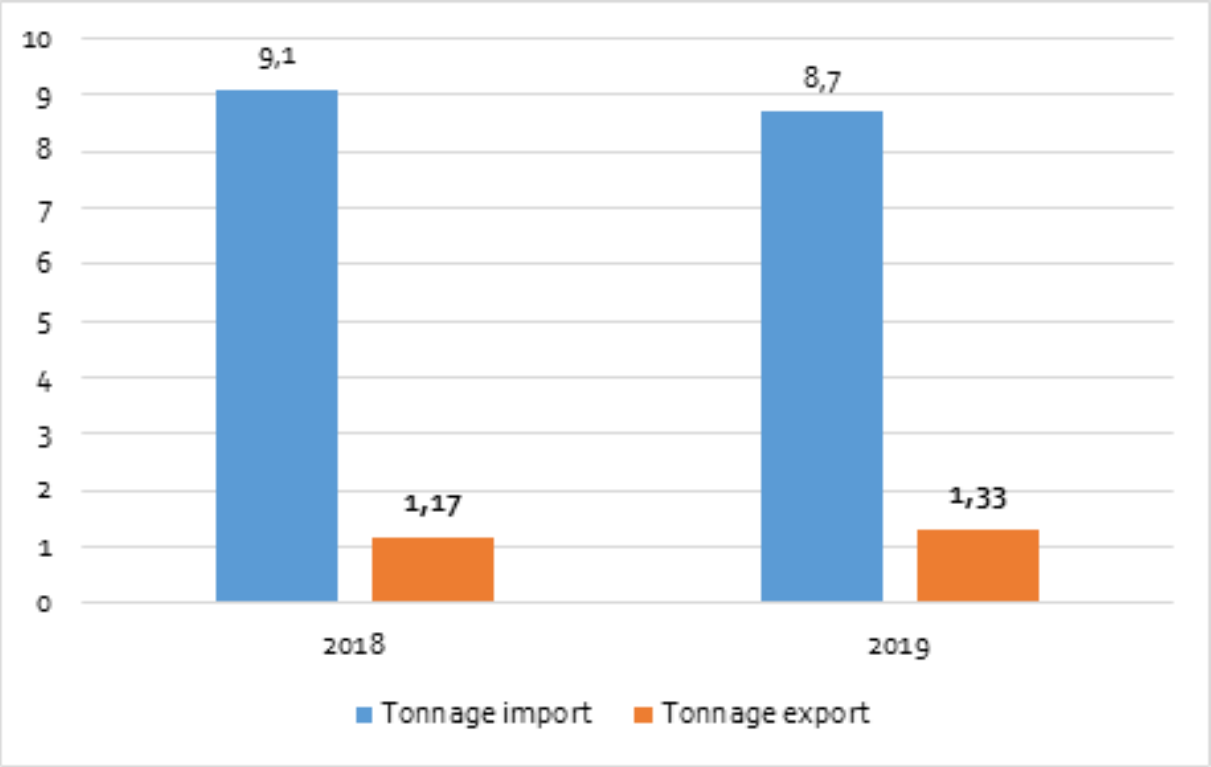
During the visit, the participants were told the history of the creation of the port, the development projects, and its operation. They also saw the facilities and infrastructures that allow the port to function well.

Participants toured the docks, the monitoring and planning room, the hold stores, and a bulk dock. This visit allowed them to understand the fertilizer flow and put into perspective the importance of understanding the operations and benefits of ports in the supply of fertilizer.

In the Port of Cotonou, for unloading fertilizers, the bulk quays Q1 to Q6 with a draft of 10 to 12 m and a capacity to receive 4-5 vessels of at least 200 m are used. The commercial quay to the north is 1260 m long and comprises 8 berths, including four

berths (Q1, Q2, Q3, Q4) each 155 m long, two berths (Q5 and Q6) each 180 m long for the use of conventional ships, berth Q7 220 m long for the use of container ships and berth Q8 (berth at the end of the commercial quay) for the use of roll-on/roll-off ships. The graph below shows the volumes of goods via the port of Cotonou. A slight decrease in 2018 can be noticed.

Chart 2 Volumes of goods handled by the Port of Cotonou from 2018 to 2019 (in millions of tons)



VI. Methodology of group work

After the plenary sessions that allowed participants to have information on the previous studies that covered 6 countries in the region, the group work started on Wednesday, August 25 to update the information to validate:

- Fertilizer statistical data (production, import, and export) from 2015 to 2020 to determine apparent consumption by country for each year.
- Information on import procedures and transaction costs along the entire fertilizer value chain (from the port of Cotonou to the end-user in Benin and Niger)

Two group work sessions were held, the first on fertilizer consumption statistics and the second on information on logistics, procedures, and costs.

Three groups were formed and grouped participants by country (Group 1: Benin, Group 2: Togo, and Group 3: Niger). Before starting the work, each group designated a moderator to organize the discussions and a reporter to take notes and report the results at the end of the work.

The work for the validation of the statistical data of fertilizers was done after a presentation of the methodology used since 2010 to give a fair approximation of the

real consumption. It is often difficult to interview all farmers to know the real consumption. Therefore, the apparent consumption is used as an approximation of the real consumption. The concept of apparent consumption assumes stable inventory levels in the fertilizer distribution chain-importers, distributors, retailers, government agencies, and agricultural producers. It assumes that the supply (availability) of fertilizer is equal to consumption:

Apparent consumption = Production + Imports - Exports - Non-agricultural use of fertilizers

To this end, each group member was given (1) an Excel file from the customs services containing foreign trade data (imports, exports) for fertilizers, and (2) a Word file containing questions to clarify and validate the available information. For Benin and Togo, the data for 2015 and 2016 were validated during the FTWG workshop in 2017. However, an update was made based on data from customs, national statistical agencies and/or institutes, and private sector actors. For Niger, a reconciliation of import volumes was done based on data from customs, the INS, and private sector actors who were contacted directly.

The work for the validation of data on costs and import procedures was carried out after a presentation of the logistic operations necessary for the distribution of fertilizers to agricultural producers. Then the participants, based on a questionnaire, updated the information available in the countries.

At the end of the two working sessions, each group presented its results and answered questions from other participants. Recommendations were also made to improve the methodology of the studies as well as the existing mechanisms in the countries to ensure the importation and distribution of fertilizers.

VII. Results of the review of fertilizer statistics for Benin, Togo, and Niger

The validated data is compiled and used to generate the apparent fertilizer consumption value table. After compiling the apparent consumption data, we reconcile the apparent consumption with the actual consumption only when consumption data are available.

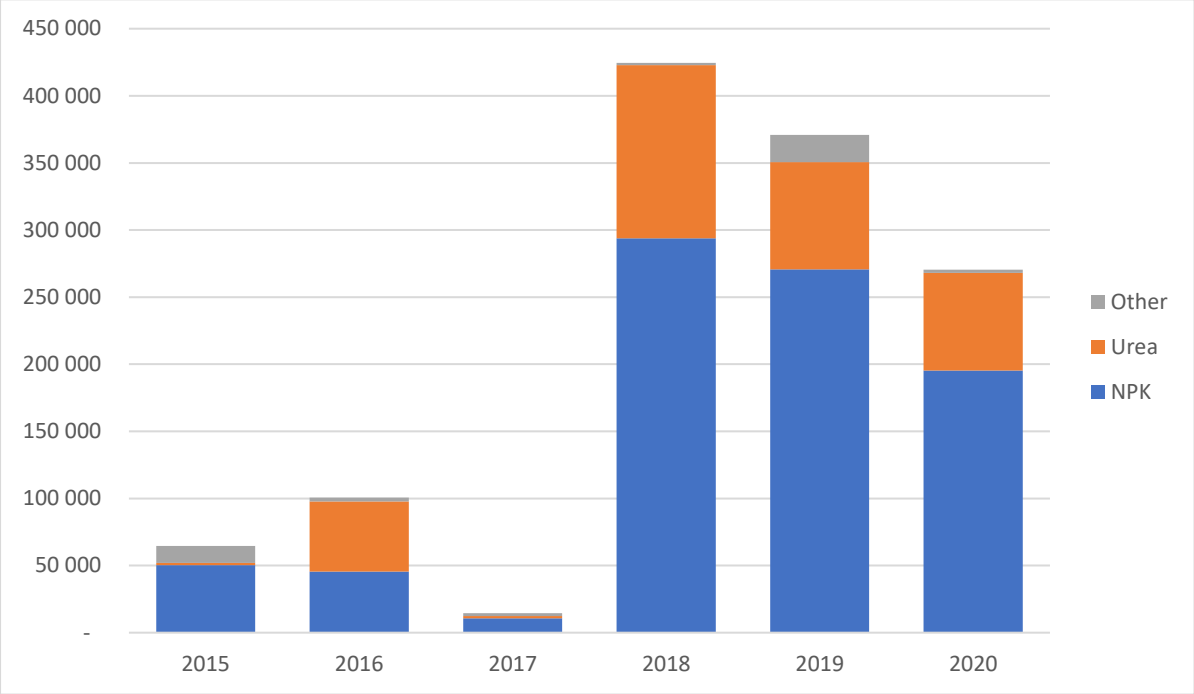
BENIN

a. Presentation of validated statistics from 2015-2020

There is no primary production of mineral fertilizer. There is a production of organic fertilizer estimated at 8,300 tons in 2020, of which 60% is for local consumption and 40% is exported to neighboring countries.

Apparent fertilizer consumption in Benin has more than quadrupled over the past 5 years, from 64,519 tons in 2015 to 278,688 in 2020.

Chart 3 Evolution of apparent fertilizer consumption in Benin from 2015 to 2020 (in tons of products)



b. Explanation of trends

This increase stems from the government's cotton strategy to make Benin one of the leading cotton producers in Africa. This policy has encouraged farmers to produce more cotton and is reflected in the increase in the area planted to cotton from 2017 (from 250,000 hectares in 2017 to 600,000 hectares in 2020), on which the increase in demand for cotton fertilizer is based. The significant drop in fertilizer consumption in 2017 is linked to two main factors, notably the change in political regime towards the end of 2016 and the reforms implemented at the same time, which had a strong impact on fertilizer supply.

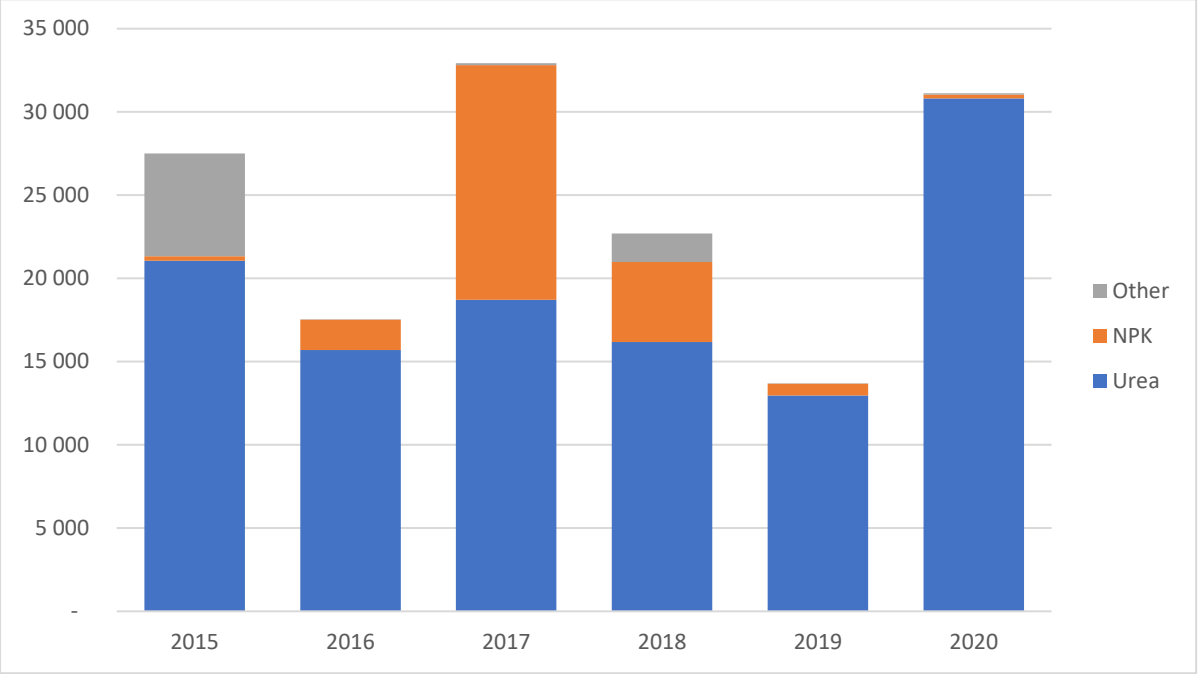
NIGER

a. Presentation of validated statistics from 2015-2020

There is no mineral fertilizer production in Niger. There is organic fertilizer production, but this could not be evaluated. Over the 2015-2020 period, a large portion of the fertilizer consumed is imported by the State (CAIMA).

During the last 5 years, the apparent consumption was around 24,251 tons of fertilizer on average per year, for an estimated demand of between 60,000 and 70,000 tons (according to the Ministry of Agriculture).

Chart 4 Evolution of apparent fertilizer consumption in Niger from 2015 to 2020 (in tons of products)



b. Explanation of trends

The low level of apparent consumption is explained by informal imports from Benin and Nigeria, which do not go through customs checkpoints and account for more than 50% of fertilizer used in Niger. In 2019, the government instituted VAT and customs duties on fertilizer, which further reduced the level of private fertilizer imports. In 2020, the new fertilizer sector reform helped cancel the VAT on fertilizer and stimulate supply and demand. From January to July 2021, 70,000 tons of fertilizer were imported according to customs databases.

TOGO

a. Presentation of validated statistics from 2015-2020

There is a production of rock phosphate from Société Nouvelle des Phosphates du Togo (SNPT). It has an extraction site at Hahotoé and a rock phosphate processing unit at Kpémé with a capacity of 4,800,000 tonnes per year. SNPT's phosphate production is fully exported. In 2020, SNPT produced and exported 1,321,345 tons of rock phosphate. In addition to rock phosphate production, Togo has a fertilizer blending unit. This is the Compagnie Togolaise d'Intrants Agricoles (CIAT), located in the industrial free zone of Lomé and owned by the Swiss group MAMBO. Its production capacity is 120 tons per hour. It formulates several NPK formulas. Like rock phosphate production, most of CIAT's production is destined for export in the sub-region, particularly to Burkina Faso. Only a small part of the local fertilizer market is covered. In 2020, CIAT produced 17,212 tons of all fertilizers.

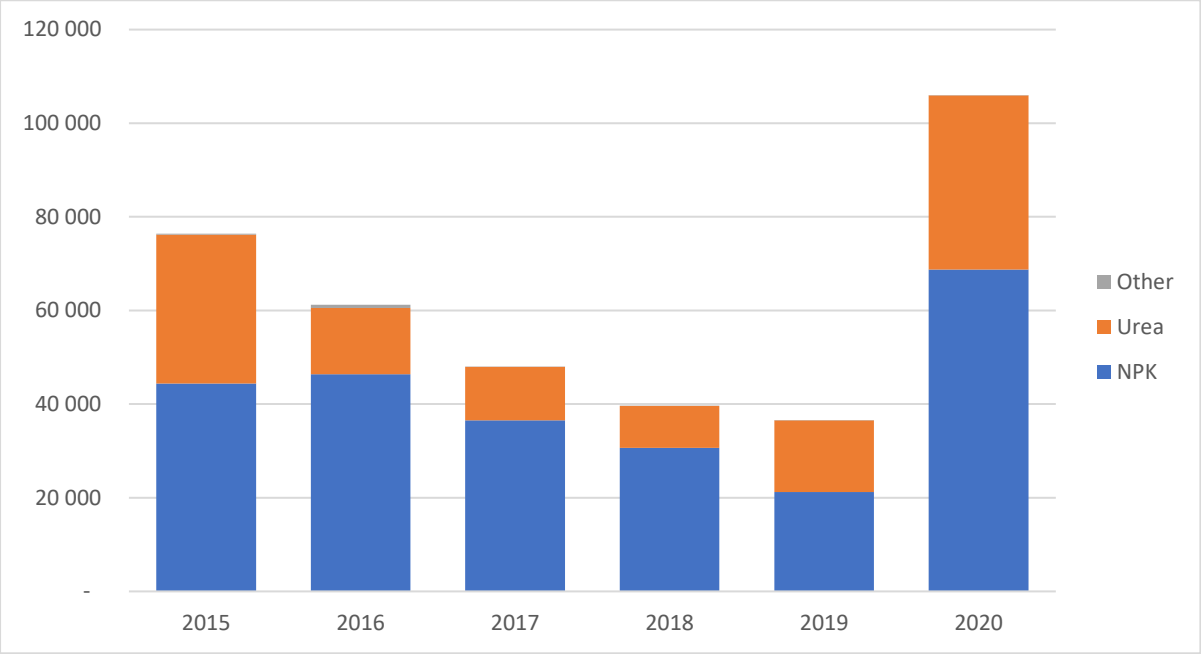
Table 1 Fertilizer production in Togo from 2015 to 2020 (in tons of products)

Indicators	Fertilizer volumes (in tons)

Year	2015	2016	2017	2018	2019	2020
CIAT Production	31 866	50 915	16 131	25 399	14 286	17 212
Production SNPT (Export)	1 150 194	850 076	732 503	1 020 121	703 773	1 321 345

During the last 5 years, apparent consumption averaged 52,400 tons per year. A significant increase was observed in 2020, with for the first time, a record apparent consumption of 105,982 tons of fertilizer.

Chart 5 Evolution of apparent fertilizer consumption in Togo from 2015 to 2020 (in tons of products)



The actual consumption data presented here are from the CAGIA and Ministry of Agriculture Agricultural Statistics databases. The actual consumption of fertilizer over the last 5 years is quite low. It ranged from 39,000 tons to 45,000 tons. A significant increase of 60,504 tons of fertilizer was recorded in 2020. This actual consumption was compared with the apparent consumption. Differences were observed, the largest of which was 43,032 tons of fertilizer in 2020.

Table 2 Comparative analysis of real and actual fertilizer consumption in Togo from 2015 to 2020

Indicators	Fertilizer volumes (in tons)					
Year	2015	2016	2017	2018	2019	2020
Apparent consumption	46 595	38 430	39 200	25 496	35 092	103 536
Actual consumption*.	44 553	41 237	41 970	42 458	39 708	60 504

Apparent Consumption - Actual Consumption	**2 042**	**-2 807**	**-2 770**	**-16 962**	**-4 616**	**43 032**

**Data from CAGIA and DSDI*

b. Explanation of trends

Historically, the volumes of fertilizer imported and distributed in Togo came mainly from state orders. The low level of fertilizer consumption over the 2017-2019 period is due to two main factors, namely the withdrawal of the state from the import and distribution of fertilizer and the low capacity of private companies to cover all of the farmers' needs. The high fertilizer consumption in 2020 is due to the state importing a high amount of fertilizer as part of the state's measures to mitigate the effects of Covid-19 on food security.

Comparative analysis of apparent and actual consumption data indicates relatively large variations, which participants attribute to the existence of residual stocks at the end of each year.

During the group work, the Togo team noted the importation of fertilizer from Ghana. These fertilizers are packaged in 25kg bags, which could be subsidized fertilizer from Ghana since they are packaged in the same way as the Ghanaian subsidy program. Although the quantities recorded are small, it is possible that larger quantities were imported. Indeed, CAGIA noted the presence on the Togolese market of Ghanaian fertilizer from the subsidy program. The team also noted that some fertilizer importers listed in the files did not have import permits issued by CAGIA. As a result, these companies should not have been allowed to import.

c. Challenges and recommendations to better estimate fertilizer consumption

Several findings were made during the validation, with lessons that should be taken into account in the validation process to produce a better estimate of fertilizer consumption and ensure that reliable statistics are available on a sustainable basis.

Challenges include:

- In the databases provided by customs, some lines lack precision on the description of the products and the names of the importers/exporters. This makes it impossible to determine the exact type of product (urea or NPK, etc.) and its use (agricultural or industrial). In the case of Niger, it was noted that a significant quantity of imported products was declared as products for industrial use.
- The possible existence of informal import flows that do not go through customs control posts. These informal imports represent a significant portion of the fertilizer used in Niger. This makes it difficult to assess the actual quantities imported at the national level.
- Difficulty in considering local production of organic fertilizers in the calculation of apparent consumption with the risk of inflating the figures of apparent consumption.
- A lack of data to determine actual fertilizer consumption, particularly in Benin and Niger. In cases where we have figures on actual consumption, particularly

in Togo, it was difficult to disaggregate this consumption by product and by crop.

To better assess the fertilizer consumption figures, it was recommended to:

- Educate, inform, and invite customs officials to share the minimum information required for imports and exports that will help GTTE improve data quality and detail, including product code and description, importer code, or name. Where it is not possible to obtain this information, including importer information due to its sensitivity, customs officials could provide clarification to the WGTE that would help determine end uses (e.g., agricultural, or industrial).
- Although it is known that some fertilizer is imported informally between neighboring countries, only official data are used for statistical purposes. However, customs officials could be made aware of the regulatory framework that has been put in place (the requirement for approval and/or import authorization), which will help to strengthen inspection and control of fertilizers and to collect reliable information on fertilizer flows.
- Data on organic fertilizer production should be treated with care to avoid inflating fertilizer consumption figures.
- Provide annual statistical surveys of public bodies, fertilizer distributors and take into account the volumes of tenders, to have reliable and updated data on actual fertilizer consumption by product and by crop.

VIII. Logistics, import procedures, and cost structure of fertilizers

Before the beginning of the group work on logistics, import procedures and cost structure, Mr. Kido KOUASSI, SRC of the EnGRAIS project for the East zone of ECOWAS presented the results of the study conducted by EnGRAIS in 2019 by taking the case of Togo. This presentation served to edify the participants on the direction to be given to their work. The presentation covered the description of the port of Lome and its advantages, the operations of unloading a ship, the steps to follow to import fertilizer in Togo, the structures involved, as well as the costs and delays related to each of these steps. After Mr. KOUASSI, Mr. Ben-Vital PKANOU presented the information collected for Benin and urged his representatives to verify and complete it. Similarly, Mr. YAOU Aminou of the PARSEN project presented the information collected by the PARSEN project on the costs and procedures for importing fertilizer into Niger.

IX. Group work on logistics, import procedures, and fertilizer cost structure

Following the presentations, participants joined their respective groups to analyze the logistics, import procedures, and cost structure of fertilizers.

Togo and the Port of Lomé

Togo and the Port of Lomé were studied in 2019 during the first phase of the study conducted by IFDC with the assistance of Nitidae. Thus, the objective for Togo was different from that of Benin and Niger. For Togo, the objective was to verify the available information to update it if necessary and to report any new information that had emerged since the publication of the results of the previous study.

Participants made significant changes to the customs duty section of the cost structure, as well as the importer overhead costs. These changes are reflected in the summary table of changes in the Annex. Most importantly, the community taxes that included both ECOWAS and the AU, which amounted to 0.5% of CIF, were revised to separate the AU tax at 0.2% from the ECOWAS tax, which is indexed at 0.5%. To these two community taxes, the participants added the WAEMU tax of 0.8%. The tax of protection and maintenance of infrastructure which amounts to 2,000 FCFA was added. In the section "General costs importer" the minimum amounts for the transport from the port to the warehouse and the handling fees have been respectively revised from 2,160 to 1,600 and from 1,620 to 1,000 FCFA. In addition, the amount of tax on profit has been revised to 27% instead of 25%. In addition, they noted that all fertilizer imports are subject to inspection fees amounting to 500 FCFA per ton. On the import procedure, participants noted the introduction in 2020 of paying approvals valid for 3 years for commercial activities in fertilizers. These are the approvals Importers, exporters, and distributors of mineral fertilizers at 2,500,000 CFA francs, Distributors of mineral fertilizers at 1,000,000 CFA francs and Importers, exporters, and distributors of organic fertilizers at 500,000 CFA francs. The structure in charge of issuing cargo tracking slips is now ANTASER instead of CNCT. Participants also noted that the other stages of the import procedure remain in place. However, the dematerialization that consisted in putting all customs clearance activities online now allows these activities to be done more efficiently.
Moreover, no major procedural changes have been introduced due to COVID-19 other than the now customary barrier measures. Similarly, the rules against fire and explosions have been strengthened without impacting the procedures themselves.

The participants were not able to comment on projects and innovations at the Port of Lomé because the Togolese delegation did not have competent representatives in this field. The participants from Togo nevertheless promised to verify this information once they return to their country.

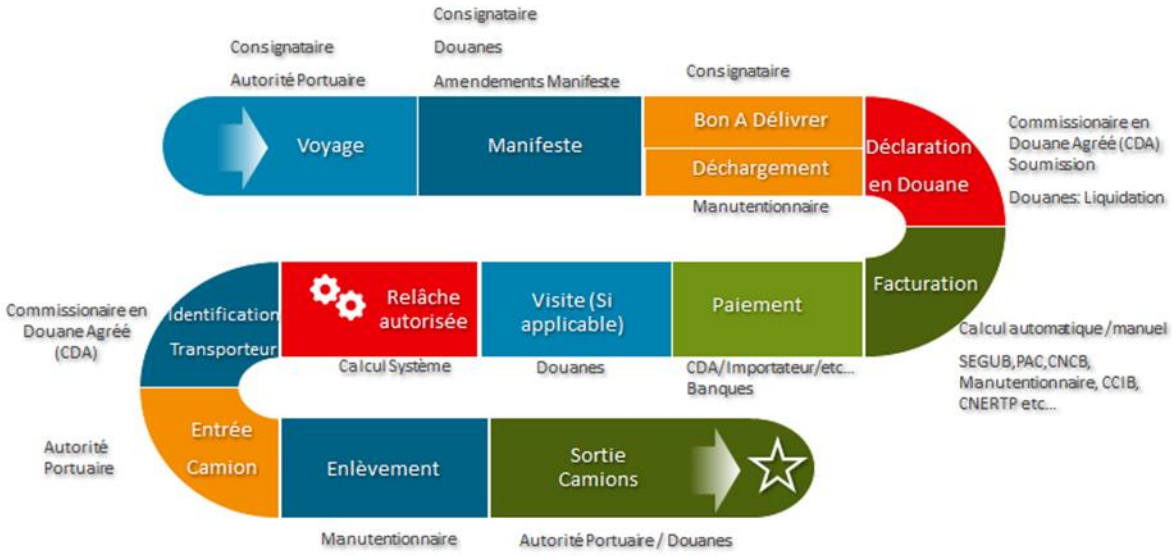
Participants identified problems with logistics and information available that make it difficult to make fertilizer available to farmers in the area. To overcome these problems, they made recommendations.

Benin

The group reviewed the status of the information collected on the procedures and identified some deficiencies. The members of the group then worked on correcting these deficiencies. These are essential:

At the outset, the group mentioned that since July 9, the import of goods into Benin is now carried out by the following procedure:

Figure 1 Procedure for importing goods into the Port of Cotonou



Source: Webb FONTAINE, 2021

At the level of the preliminary stages to the importation of fertilizers and which take place at the level of the National Committee of Approval and quality control of Fertilizers (CONACE), the group specified that the cost of attribution of the approvals is not yet fixed. Thus, CONACE has granted provisional approvals for 6 months to importers wishing to have it. Upon signature of the decree, importers will be invited to comply with the regulations. The period of validity of the approvals is 3 years. The duration of the issuing procedure is 90 days maximum from the date of submission of the file.

At the port level, the sequence and progress of the procedures were described according to the operating mode of the *Société d'Exploitation du Guichet Unique du Bénin* (SEGUB), taking into account the realities experienced by the actors (freight forwarders/customs agents, port agents, Webb Fontaine, customs, importers) on the port platform.

The costs, durations, and particularities of the different operations carried out at the GUCE platform have been corrected or specified. The structures offering these services and recipients of the fees paid by the actors were also specified. It was recommended to the consultant to approach the port structures (Customs, SOBEMAP) to confirm this information.

Unlike Togo, where the workshop served to update information already collected during the first phase of the cost structure study conducted in 2019, for Niger and Benin, it was a matter of validating the information newly collected during the second phase.

Niger

Niger is largely supplied with fertilizer via the port of Cotonou and the road corridor linking Cotonou to Niamey, which was not covered in the first round of studies conducted in 2019. Thus, the data verified during the workshop was collected by the PARSEN project using a methodology and framework used by the EnGRAIS project. Thus, during the group work, participants verified the accuracy of the process steps, timelines, and costs of operations as captured by the study organizers.

Participants also identified constraints and made recommendations to address them. The constraints and recommendations, most of which are general and applicable to all countries in the zone, are recorded in the following section.

Participants from Niger emphasized the importance of this type of exercise for them. For example, until 2020 fertilizer was still subject to a 5% customs duty and 19% VAT, making it extremely expensive for producers when supplied by the private sector. Following the publication in May 2020 by EnGRAIS of the customs duties and VAT rates applied to fertilizers in the 15 ECOWAS countries, ANIDE had the facts to request and obtain the removal of customs duties and VAT as recommended by the ECOWAS Common External Tariff.

X. Constraints and logistical bottlenecks on the corridors served by the Ports of Lomé and Cotonou

Participants highlighted several constraints that limit the increase in fertilizer consumption in their respective countries. Among these constraints, they mentioned the lack of easily accessible and understandable information on international fertilizer price dynamics. They also noted that the requirement to import fertilizer from overseas makes the region vulnerable.

Indeed, not only do fluctuating shipping costs and other port exit fees add to the cost of fertilizer, but also, in times of fertilizer shortages on the international market, orders from the region are disadvantaged. Another constraint they identified is the lengthy process for obtaining approvals in some countries. This red tape limits the dynamism of the private sector. In addition, participants noted that some products that are not classified as fertilizers but are used as fertilizers are not exempt from VAT, such as soil conditioners and micro-nutrients. These costs add barriers to the adoption of balanced plant nutrition.

XI. Recommendations

To reduce these constraints and thus improve the cost and supply of fertilizer in the region, participants made recommendations. They suggested the creation or promotion of a sub-regional mechanism to advise importers and decision-makers on the international dynamics of the fertilizer market. Efforts to promote the IFDC publication Actu-Engrais, which already plays this role, should be intensified. Similarly, participants called for the harmonization of costs of port operations and particularly import procedures at the ECOWAS level, to reduce the time required to issue professional approvals. They also called for accelerating the process of setting the costs of obtaining professional approvals for fertilizers still underway in several countries in the area. To resolve dependence on the international market, participants

suggested that a study be conducted, and recommendations made to increase local fertilizer production in countries of the zone with resources or fertilizer production capacity.

They also made general recommendations related to the theme of the workshop. These are:

- The perpetuation of this exchange framework on volumes, procedures, and costs and its extension to other countries
- Conducting a fact-finding mission on the current state of the fertilizer market to policymakers and their partners, particularly those in Niger.

XII. Next steps

Following the workshop, a report capturing the main outcomes of the workshop will be distributed to the participant. Participants will have one week to provide feedback before the report is shared more widely.

In addition, the results of the workshop will be used to improve the ongoing studies on cost structures and fertilizer consumption in ECOWAS. The consolidated versions of these studies will be available by the end of the 2021 calendar year.

IFDC through its EnGRAIS project will work on the implementation of other recommendations of the workshop that fall under the scope of its ongoing activities.

XIII. Closing and Conclusion

At the end of the workshop, the participants praised the workshop as an eye-opener in several respects. They also wished that this workshop could be held regularly to enable them to take stock of the progress made, understand and be aware of situations that could impact the availability and therefore the consumption of fertilizers in the region. Speaking on her behalf, on behalf of the organizers, and on behalf of the whole IFDC, Mrs. LEMA SAYI, thanked the participants for their frank collaboration. She also promised that the recommendations would be followed up until their full implementation before declaring the workshop closed.

XIV. *Annexes*

Terms of reference

Context

As part of its efforts to enhance the growth of the fertilizer sector, the Stimulating Growth through Regional Agricultural Input Systems, (EnGRAIS) project, in collaboration with WAFA and AfricaFertilizer.org, conducted a study in 2019 to describe the logistics chains, import, and distribution procedures for fertilizer, and provide an accurate cost structure for fertilizer transiting through the ports and trade corridors that supply most smallholder farmers in West Africa.

The activity was divided into two phases. The first phase covered 6 countries in the region and their main trade corridors. These are Senegal, Mali, Burkina Faso, Togo, Ghana, and Côte d'Ivoire, mainly served by 4 ports (Port of Abidjan in Côte d'Ivoire, Tema in Ghana, Dakar in Senegal, and Lome in Togo). After validation by fertilizer and logistics experts and stakeholders in August 2019, a report on the "Structure of logistics costs and procedures for fertilizer imports along 4 corridors in West Africa" was published along with 4 fact sheets on the ports studied. The second phase, which was delayed due to the COVID-19 pandemic, covers other trade corridors serving Nigeria, Niger, and Benin (via the port of Cotonou).

On another note, EnGRAIS is supporting WAFA and AfricaFertilizer.org to monitor annual fertilizer production, trade, and consumption statistics in Senegal, Mali, Burkina Faso, Ghana, Nigeria, and Côte d'Ivoire, for which the 2020 statistics were validated between March and April 2021 by the National Fertilizer Technical Working Groups (NTWG). However, the volumes of fertilizer consumed in Benin, Niger, and Togo have increased significantly in recent years and should be monitored to provide a more accurate picture of current fertilizer consumption in the subregion.

Within this framework, EnGRAIS has undertaken a series of studies on fertilizer statistics, procedures, and logistics costs in Benin, Togo, and Niger.

The specific objectives of these studies are to:

- Determine the logistics cost structure of fertilizer and the procedures for importing fertilizer into Benin and Niger;
- Provide data on fertilizer imports and exports in Benin, Togo, and Niger;

To do this, working sessions were held with key players in the public and private sectors of these countries. These include structures in charge of agriculture, customs statistics, fertilizer importing companies, those involved in logistics operations for fertilizers, and port services.

Following this information-gathering phase, the EnGRAIS project will organize a workshop with key stakeholders in fertilizer logistics in Benin, Niger, and Togo from August 24-26, 2021, to validate the information collected on fertilizer imports and exports in the three countries as well as on the cost structure in Benin and Niger

Objectives

The main objective of this workshop is to validate the information collected on fertilizer volumes, import procedures, and cost structures in the study area and to obtain recommendations for improving fertilizer volumes and prices.

Specific objectives

The specific objectives are to:

- Review and validate the results (costs and procedures) of fertilizer imports to Benin, Niger, and Togo through the Autonomous Port of Cotonou;
- Validate data on fertilizer statistics from Benin, Togo, and Niger with the support of representatives of public institutions and the private fertilizer sector;
- Identify logistical bottlenecks limiting fertilizer consumption and causing overbidding;
- Obtain recommendations for lifting these limitations.

Expected results

The expected outcomes of this workshop are:

- Information on fertilizer costs and procedures for the Autonomous Port of Cotonou is reviewed and validated;
- Data on statistics are reviewed and validated;
- Fluctuations and anomalies in costs and volumes are explained;
- Recommendations are proposed and validated for the improvement of costs and volumes of fertilizers consumed;

Participation in the workshop

The workshop will bring together 50 participants from the public, private, and civil society sectors from 7 countries. They are Benin (17), Togo (10), Niger (15 including 3 residents in Benin), Cote d'Ivoire (3), Ghana (3), Kenya (1), Nigeria (1).

Public institutions from Benin, Togo, and Niger invited to participate in this workshop include

- The Directorate of Agricultural Statistics of the Ministries of Agriculture;
- The bodies of the Ministries of Agriculture responsible for the management, control, and distribution of inputs;
- The Customs Statistics Departments ;
- National Statistical Institutes (NSI);
- The Autonomous Port of Cotonou ;

Private structures and organizations invited to participate in this workshop include:

- Private operators in the fertilizer sector (importers, manufacturers, producers);
- Professional associations and interprofessional in charge of fertilizer-consuming crops (e.g., cotton);
- Key technical partners, projects, and programs working on fertilizer issues;
- Organizations involved in fertilizer logistics (Handlers, Transporters, etc...)

The Organizers

- IFDC EnGRAIS
- IFDC AFO
- IFDC PARSEN
- IFDC Benin

Methodology

Organization and working method

- Invitation letters will be sent to participants one week before the workshop;
- Before the workshop, documents (TOR, Agenda...) will be distributed to each participant;
- The workshop will begin with a visit to the Port of Cotonou to allow the participant to get a feel for the reality described in the study;
- During the workshop, the organizers will present the main results of the study. Thematic and sectoral working groups will be formed by country to revise and improve the main results, i.e., statistics, process maps, and cost structures. Terms of reference for the group work will be made available to the groups;
- The working language of this workshop will be French. Final documents will be available in French and English.

Date and place of the meeting

The workshop is scheduled for August 24-27, 2021, in a hotel in Cotonou, Benin

TDR group work on statistics

Roundtable 1: Validation of produced, imported, exported, and fertilizer volumes

Context

During the workshop, participants will be asked to contribute to the statistical validation of fertilizers from 2015 to 2020. This will be done through round tables that will be organized for this purpose.

Objective

Validate information on fertilizer statistics 2010 - 2020

Specific objectives

- Verify and validate statistical data on fertilizers in each country with the support of representatives of public institutions and the private fertilizer sector. **Priority for 2020**.
- Present validated data and explain trends
- Compare the apparent consumption with the actual consumption in case the information on the actual consumption is available
- Identify constraints/difficulties related to the process
- Recommendation to improve the validation process

Methodology

Three groups of approximately 10 people each are proposed for the working groups. Each group will review the information for the country of origin of its members.

- Group 1: Benin
- Group 2: Togo
- Group 3: Niger

Each group will appoint a moderator and a reporter.

The Word file containing the questions and the information to be validated in the form of a table will be made available to the members of the groups.

TORs for group work on logistics costs and fertilizer import procedures

Roundtable 2: Validation of data on costs and import procedures

Context

During the workshop, participants will be asked to contribute to the validation of the information collected on the import procedure and the costs of making fertilizers available. This will be done through round tables that will be organized for this purpose.

Objective

Validate information on import procedures, supply costs, identify bottlenecks and make recommendations for their removal

Specific objectives

- Check the information on fertilizer import procedures and correct if necessary
- Verify the costs associated with the various operations to make fertilizer available in the consumption areas.
- Identify bottlenecks that make it difficult to provide fertilizer
- Identify measures to remove these limitations

Expected results

- Validated fertilizer import procedure
- The cost structure of fertilizers delivered to the wholesaler in the consumption area
- Recommendation to improve fertilizer accessibility

Methodology

Three groups of approximately 10 people each are proposed for the working groups. Each group will review the information for the country of origin of its members.

- Group 1: Benin
- Group 2: Togo
- Group 3: Niger

Each group will appoint a moderator and a reporter.

The Word file containing the questions and the information to be validated in the form of a table will be made available to the members of the groups.

Agenda

Day 1 - Tuesday, August 24, 2021		
Time	**Activities**	**Manager**
08:00 - 08:30	Welcome and registration of participants	Diyana Bawiena Davis
08:30 - 08:40	**Opening ceremony**	Patrice Annequin

08:40 - 09:10	Welcome speeches IFDC Benin, Representative Niger, Representative Togo,	Françoise Sayi, Niger Representative, Togo Representative
09:10 - 09:25	Speeches Minister of Agriculture Benin	Minister
09:25 - 10:00	Presentation of the participants	Participants
10:00 - 10:30	Workshop program, objectives and expected results; Questions - Answers	Patrice Annequin
10:30 - 11:00	**Coffee break + Family photo**	
11:00 - 11:30	Presentation of the institutional framework (IFDC-EnGRAIS-AFO)	Patrice Annequin
11:30 - 11:45	Review of West African stats	Samuel Goulivas
11:45 - 12:00	Presentation of the context of the study on logistics costs and fertilizer import procedures	Olive M'Bahia
12:00 - 12:15	Presentation of the validation methodology	Kido Kouassi
12:15 - 12:30	Questions - Answers	Moderation EnGRAIS
12:30 - 12:40	Logistics information	Diyana Bawiena Davis
12:40 - 13:40	Lunch break	
14:00 - 17:00	Visit the port End of the 1st day	
18:00	**End of day 1**	

Day 2 - Wednesday, August 25, 2021		
Time	**Activities**	**Manager**
08:00 - 08:30	Welcome and registration of participants	Diyana Bawiena Davis

08:30 - 09:00	Presentation of available statistics by country and validation methodology	Samuel Goulivas
09:00 - 10:00	Group work: Review and validation of fertilizer import and export statistics for 2015 - 2020	Country Working Group
10:00 - 10:20	**Coffee break**	
10:20 - 12:30	Group Work: Review and Validation of Fertilizer Import and Export Statistics for 2015 - 2020 (continued)	Country Working Group
12:30 - 14:00	**Lunch break**	
14:00 - 14:30	Restitution of group work	Rapporteur per group
14:30 - 16:00	Presentation of validated data by country, explanation of trends and forecasts for the coming season in the context of rising fertilizer prices	Moderation EnGRAIS
16:00 - 16:20	**Coffee break**	
16:20 - 17:30	Presentation of validated data by country, explanation of trends and forecasts for the coming season in the context of rising fertilizer prices (continued)	Moderation EnGRAIS
17:30	**End of day 2**	

Day 3 - Thursday, August 26, 2021		
Time	**Activities**	**Manager**
08:00 - 09:00	**COVID START TEST**	
09:00 - 09:15	Presentation of the import procedures and the logistic costs Benin	Ben-Vital Kpanou
09:15 - 09:30	Presentation of import procedures and logistic costs Niger	Mahamadou Aminou Yaou
09:30 - 09:45	Presentation of import procedures and logistic costs Togo	Kido Kouassi
09:45 - 10:15	Questions - Answers	Moderation EnGRAIS

10:15 - 10:30	**Coffee break**	
10:30 - 12:30	Group work: Review and validation of information on : Import procedures Logistic costs Identify logistical constraints and their impact Recommendations	Country Working Group
12:30 - 13:30	**Lunch break**	
13:30 - 15:30	Restitution of group work Exchanges and discussions Recommendations	Rapporteur per group Moderation EnGRAIS
15:30 - 16:00	Validation of recommendations and proposals for key actions to be taken	Moderation EnGRAIS
16:00 - 16:15	Logistics information	Diyana Bawiena Davis
16:15	End of the workshop and closing remarks Information on logistics + Word of thanks	Patrice Annequin

Day 4 - Friday, August 27, 2021		
Time	**Activities**	**Manager**
08:00 - 08:30	Welcome and registration of participants	Diyana Bawiena Davis
08:30 - 12:00	Field visit in Ouidah	
13:00 - 14:00	Lunch & end of the workshop	

List of Participants

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Summary of fertilizer statistics in 2020

Summary of fertilizer statistics in Benin in 2020

RESUME DES STATISTIQUES DES ENGRAIS EN BENIN EN 2020							
SH Code	**Produit**	**Production**	**Importation**	**Exportation**	**Non-agricultural used**	**Agrucultural Import**	**Estimated Consommation 2020**
3105200000	NPK		196,828		1,508	195,320	195,320
3102100000	Urée		72,801			72,801	72,801
3105600000	Engrais PK		1,811			1,811	1,811
3102210000	Sulfate d'ammonium		356			356	356
3101000000	Engrais organiques		52			52	52
3102900000	Autres engrais azotés		155	110		155	45
3104900000	Autres engrais potassiques		3			3	3
3105510000	Engrais NP		0			0	0
3104200000	KCl		0			0	0
3102300000	Nitrate d'ammonium		348		348	-	-
3102500000	Nitrate de sodium		0		0	-	-

Summary of fertilizer statistics in Niger in 2020

SH Code	**Produit**	**Production**	**Importation**	**Exportation**	**Utilisation non-agricole**	**Importations agricoles**	**Consommation apparente 2020**
3102100000	Urée		30,821			30,821	30,821
3105200000	NPK		225	4		225	221
3105300000	DAP		43			43	43
3101000000	Engrais organiques		26			26	26
3102210000	Sulfate d'ammonium					-	-
3102300000	Nitrate d'ammonium		76		76	-	-
Total engrais (tonnes)		**-**	**31,190**	**4**	**76**	**31,115**	**31,111**

Summary of fertilizer statistics in Togo in 2020

SH Code	Product	Production	Importation	Exportation	Non-agricultural used	Agricultural Importation	Estimated Consumption 2020
3105200000	NPK		76,387	7,605	1	76,386	68,781
3102100000	Urée		44,860	7,694		44,860	37,166
3101000000	engrais organiques		36			36	36
3102300000	Nitrate d'ammonium		118		118	-	-
3102210000	Sulfate d'ammonium		56	601		56	(545)
3104200000	KCl		31	1,932	1	30	(1,902)
Total engrais (tonnes)		**-**	**121,488**	**17,832**	**120**	**121,368**	**105,982**