

DESA

INTERNATIONAL CIVIL AVIATION ORGANIZATION (ICAO) - POTENTIAL CONTRIBUTION OF AVIATION TO AFRICAN ECONOMIES, REGIONAL PROJECT - MISSION REPORTS, N-U 29 JULY - [1-31] OCT 1975

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PROJET PNUD/OACI  
RAF/74/021

TE 210 (2) ICAO



**ÉTUDES VISANT À DÉTERMINER LA CONTRIBUTION  
QUE L'AVIATION CIVILE PEUT APPORTER  
AU DÉVELOPPEMENT DES ÉCONOMIES NATIONALES  
D'ÉTATS AFRICAINS**

**NIGER**

**OCTOBRE 1975**



RAPPORT DE MISSION

NIGER

*(8 septembre au 3 octobre 1975)*

Conformément aux instructions reçues du siège de l'OACI,  
le présent rapport est présenté directement au Gouvernement sans  
attendre les observations du siège de l'Organisation sur sa teneur  
pour éviter les retards que cela pourrait éventuellement entraîner.

Le rapport a été préparé par:

P. Lescure, économiste du transport aérien et

R. Robinson, expert en transport

sous la direction de

N. Detière, Directeur du Projet.

CONTRIBUTION POTENTIELLE DE L'AVIATION AUXECONOMIES AFRICAINESPNUD/OACI PROJET RAF/74/021

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## INTRODUCTION

Section 1 - DESCRIPTION DU PROJET

1.1 Le Programme des Nations Unies pour le Développement (PNUD) a approuvé ce projet multinational en Afrique et l'Organisation Internationale de l'Aviation Civile (OACI) a été chargée de l'exécution du projet.

1.2 Pays participants. Trente-neuf pays ont participé dans le projet. Un rapport sera préparé sur chacun des pays participants, les suivants:

|               |                    |                           |              |
|---------------|--------------------|---------------------------|--------------|
| Angola        | Ghana              | Mali                      | Sénégal      |
| Botswana      | Guinée             | Maurice                   | Sierra Leone |
| Burundi       | Guinée Bissau      | Mauritanie                | Somalie      |
| Cameroun      | Guinée équatoriale | Mozambique                | Souaziland   |
| Congo         | Haute-Volta        | Niger                     | Tanzanie     |
| Côte d'Ivoire | Kenya              | Nigéria                   | Tchad        |
| Dahomey       | Lesotho            | Ouganda                   | Togo         |
| Ethiopie      | Libéria            | République centrafricaine | Zaire        |
| Gabon         | Madagascar         | Rwanda                    | Zambie       |
| Gambie        | Malawi             | Sao Tomé                  |              |

1.3 Justification du Projet. Dans le document relatif au Projet, sa justification était donnée dans les termes suivants:

*Le présent Projet est conçu*

premièrement pour répondre à la nécessité urgente d'une contribution plus efficace de l'aviation civile au développement des économies nationales des Etats africains;

deuxièmement pour mettre en oeuvre la Recommandation S2-32 de la deuxième session plénière de la Commission africaine de l'Aviation civile (CAFAC), relative à l'exécution d'une étude sur le transport aérien en Afrique, et à la demande formulée par la CAFAC pour que cette étude soit exécutée sous forme d'un projet régional PNUD/OACI;

troisièmement pour proposer des projets spécifiques, bien définis, dont les coûts ont été établis avec soin et dans le cadre desquels l'aviation peut contribuer au développement économique (et social) des Etats africains.

quatrièmement pour atteindre concrètement certains objectifs du "Programme d'action concernant l'instauration d'un nouvel ordre économique international" qui a été adopté par l'Assemblée générale des Nations Unies à sa sixième session extraordinaire en 1974.



1.4 Portées des Etudes. Les études porteront notamment sur les thèmes principaux ci-après:

- (1) transport de denrées périssables;
- (2) développement du transport intra-africain;
- (3) fonctionnement, gestion et rationalisation des activités nationales et sous-régionales;
- (4) avantages du tourisme pour l'économie.

1.5 Objectifs du Projet. Les objectifs du projet ont été définis dans les termes suivants:

A. OBJECTIFS A LONG TERME

(1) Contribuer au développement des économies des Etats africains en tirant parti des avantages que le transport aérien présente par rapport aux transports de surface, du fait qu'il exige des investissements moins élevés et qu'il est plus souple, pour atténuer le déséquilibre qui existe actuellement dans la structure du transport en Afrique et utiliser au maximum les avantages qu'offre l'aviation civile en aidant les Etats africains dans l'élaboration ou la révision de leurs plans nationaux de développement.

(2) Atteindre concrètement certains des objectifs du "Programme d'action concernant l'instauration d'un nouvel ordre économique international", qui a été adopté en 1974 par l'Assemblée générale des Nations Unies, à sa sixième session extraordinaire, et notamment ceux qui sont définis dans les sections I.1 (b), I.2 (b), I.4 (b), I.4 (e), et VII.1 (h).

(3) Grâce à ces efforts à long terme, la situation de l'aviation civile en Afrique se trouvera grandement consolidée.

B. OBJECTIFS IMMEDIATS

(1) Déterminer où et comment les services aériens peuvent apporter une contribution efficace au développement des économies des Etats africains. Cette activité devra débiter par une enquête sur la production actuelle et potentielle dans le secteur agricole et dans d'autres secteurs primaires et secondaires, où l'on étudiera notamment comment le développement des services aériens permettrait de vendre cette production sur les marchés potentiels.

(2) Faire une étude du potentiel touristique, avec des analyses coûts/avantages détaillées qui permettront de déterminer le profit net tiré par le pays sous forme d'entrées de devises et de création d'emplois. A cet égard, il conviendra de fixer des prix acceptables sur les marchés pour les voyages "tout compris" et de faire des propositions sur la façon dont l'infrastructure du transport et du tourisme devrait être conçue pour permettre ces prix.



(3) Etudier le déséquilibre qui existe entre les itinéraires de transport intra-africain et proposer des mesures correctives appropriées.

(4) Examiner les aspects anti-économiques en matière de transport aérien, comme la sous-utilisation des aéronefs, et suggérer diverses possibilités de coopération entre les gouvernements africains à l'effet d'améliorer cette situation et de diminuer ainsi les coûts unitaires de transport.

(5) Elaborer et proposer aux gouvernements des projets pragmatiques et réalistes reposant sur des estimations coûts/avantages détaillés et suggérer des sources de financement éventuelles.

(6) Concevoir, de concert avec des gouvernements ou groupes de gouvernements, des méthodes pour mettre en oeuvre les propositions ci-dessus.

(7) Identifier les installations et services de jonction et les services de transport terrestre d'apport ou de correspondance qu'il pourrait être nécessaire d'améliorer pour assurer l'efficacité optimale du transport aérien.

1.6 Description des activités du Projet. L'étude a été effectuée du 8 septembre au 3 octobre 1975 par M. P. Lescure (Economiste du transport aérien) et par M. R. Robinson (Expert en transport). Elle a été dirigée par M. N. Detière (Directeur du Projet), assisté de M. C. Van Diest (Administrateur de l'exécution du Projet).

1.6.2 Ce Projet, qui est essentiellement de caractère pluridisciplinaire, a exigé une collaboration étroite avec les autres institutions spécialisées et les organes des Nations Unies. L'étude a bénéficié en particulier des avis spécialisés donnés par

- l'Organisation pour l'Alimentation et l'Agriculture (FAO) sur les questions relatives à la production, à la qualité et à la mise en marché de produits horticoles, de viande et de poisson;

- le Bureau de la Coopération technique de l'ONU (BCT) pour les questions relatives aux transports de surface des produits agricoles et industriels ainsi qu'au développement du tourisme;

- la Conférence des Nations Unies sur le Commerce et le Développement (CNUCED) (et le Centre du Commerce international) pour les questions de commerce international, à partir d'études approfondies faites par la CNUCED sur la production, la valorisation et l'exportation des produits africains.

1.6.3 Il convient de souligner que le présent rapport ne constitue qu'un élément du Projet. Dans la deuxième phase, des solutions seront présentées à l'échelle régionale ou sous-régionale de manière à mieux répondre aux besoins particuliers de chaque Etat. Les recommandations soumises à l'Administration du Niger sont donc assorties de la réserve qu'elles seront reconsidérées plus tard dans un contexte régional plus large et qu'elles tiendront compte alors des contributions apportées par les autres organes des Nations Unies.



## Section 2 - PERSONNALITES ET FONCTIONNAIRES RENCONTRES

2.1 La mission de l'OACI tient à remercier les divers départements de l'Administration nationale pour la coopération qu'ils lui ont apportée. Elle remercie également les autres personnalités et fonctionnaires rencontrés (tant dans le secteur public que dans le secteur privé) ainsi que le représentant résident de l'ONU et son personnel.

2.2 On trouvera dans l'Annexe A la liste complète des personnalités et fonctionnaires rencontrés.



RESUME DES CONSTATATIONS

La mission estime que l'économie du Niger peut tirer un bénéfice important de l'utilisation de l'avion, à condition que toutes deux soient proprement adaptées l'une à l'autre.

1. Dans le domaine de l'Agriculture, elle a constaté:

- a) que les méthodes de commercialisation des produits horticoles et de ceux de l'élevage, ainsi que la prospection des marchés extérieurs susceptibles de les recevoir étaient tout à fait insuffisantes, ce qui limite considérablement le volume et la valeur des exportations,
- b) que le niveau de production de ces denrées restait inférieur à ce qu'il pourrait être, compte tenu de ce qu'il est dans les pays immédiatement voisins, soumis aux mêmes conditions naturelles,
- c) que la gestion des entreprises chargées de leur production et de leur commercialisation était insuffisamment efficace, en raison du manque de formation et du manque d'effectif qualifié des cadres,
- d) que les activités de ces entreprises n'étaient coordonnées ni entre elles, ni avec celles des compagnies aériennes dont elles utilisent les services.

Dans leurs efforts, estimés indispensables, tendant à porter remède à ces déficiences gravement préjudiciables à l'économie du Niger et à la contribution que l'aviation pourrait lui apporter, la mission pense que les autorités de ce pays pourraient, dans le domaine du marketing et dans celui de la gestion des entreprises nigériennes, faire appel, par l'intermédiaire du PNUD, à l'assistance des Organisations de l'ONU spécialisées dans ces deux domaines. Cette double mesure devrait être prise en priorité, et avant que ne soit poursuivie une politique d'intensification des productions: il est évident qu'un accroissement de productions commercialisées à perte ne ferait qu'accroître les déficits. Parallèlement, ces autorités devraient créer un organisme de coordination, réunissant périodiquement (par exemple, deux fois par mois) Transporteurs aériens et Utilisateurs de l'avion, de façon à ce que soient planifiées et normalisées les conditions d'horaires, de capacité et de tarification des expéditions par air.

2. La mission est convaincue que le Tourisme, adéquatement servi par l'avion, devrait constituer, pour le Niger, une source de revenus substantielle, et une occasion d'augmenter l'emploi. Son développement est toutefois freiné, actuellement, par l'insuffisance quantitative et qualitative, de l'infrastructure hôtelière et de l'aménagement des circuits touristiques, consécutive à l'extrême modicité des moyens budgétaires mis à la disposition de cette industrie. Celle-ci pourrait, si le Gouvernement le jugeait souhaitable, recevoir également l'assistance d'un expert des Nations-Unies chargé d'évaluer ses besoins et les moyens de les satisfaire, mais les autorités nigériennes ont indiqué à la mission que cela paraissait prématuré, dans l'état actuel des intentions gouvernementales.



3. La mission a constaté avec satisfaction que des mesures opportunes et efficaces étaient d'ores et déjà prévues, destinées à développer adéquatement le secteur de l'Aéronautique Civile, notamment dans les domaines de l'infrastructure et de la formation du personnel. Elle sait que, sur ce dernier point, un expert de l'OACI effectuera une mission au Niger, dans le courant du mois d'octobre 1975. S'ils étaient, par ailleurs jugés utiles, les conseils d'un expert de l'OACI chargé d'évaluer la situation de l'infrastructure pourraient sans doute être obtenus. En ce qui concerne la Société Air Niger, la mission approuve pleinement les mesures de redressement entreprises, notamment dans le domaine commercial, par son nouveau Directeur Général. Celui-ci pourrait également être assisté dans sa tâche par un expert OACI spécialisé dans ce domaine. Enfin, la mission estime utile de formuler une dernière et importante remarque. S'il est vrai que, dans leur état présent, les besoins de l'économie nigérienne sont relativement satisfaits sur les dessertes aériennes intercontinentales Nord-Sud, il n'en est pas de même des exigences des trafics régionaux de l'Afrique de l'Ouest, qui s'expriment déjà en tant que tels et s'affirmeront de plus en plus: l'établissement de réseaux aériens locaux, conçus pour satisfaire, avant tout, les besoins propres aux Etats d'une région donnée devrait, d'ores et déjà, retenir l'attention des Gouvernements Africains intéressés.



CONDITIONS ECONOMIQUES GENERALESDONNEES GEOGRAPHIQUES

D'une superficie de 1.267.000 km<sup>2</sup>, le territoire du Niger est bordé:

au nord, par l'Algérie et la Libye

à l'ouest, par le Mali et la Haute-Volta

au sud, par le Dahomey et le Nigéria

à l'est, par le Tchad.

Ce territoire est presque entièrement désertique, à l'exception de la région du sud-ouest, parcourue par le fleuve Niger sur une distance de 360 km.

Il est totalement enclavé: le port le plus proche est Cotonou (Dahomey) à 650 km de Niamey, celui de Lagos à 800 km.

Le climat est: désertique et subdésertique au Nord du 16<sup>e</sup> parallèle tropical au sud de ce parallèle.

La population, rurale à 80% (77% sédentaire et 18% nomade), s'élevait (en 1973) à 4.358.000 habitants.

Sa densité est l'une des plus basses de l'Afrique Occidentale: 3,26 habitants au km<sup>2</sup>.

Son taux d'augmentation annuel est de 2,7%.

Elle est concentrée le long du fleuve Niger et dans le sud du pays.

Principales villes: Niamey (Capitale): 102.000 habitants

Zinder : 45.000 "

Maradi : 37.000 "

Tahoua : 30.000 "

Les moyens de communications de surface, à l'intérieur du pays, sont très pauvres:

- réseau routier: 5.000 km., dont seulement 10% bitumé

- chemin de fer : inexistant

- le fleuve Niger, qui ne reçoit aucun affluent sur le territoire nigérien, est une voie de communication très médiocre, utilisable seulement par les pirogues, et qui ne dessert qu'une petite portion du territoire.



La République du Niger devint indépendante en août 1960; elle est dotée d'un système politique présidentiel, avec une Assemblée Nationale. Le territoire est administrativement divisé en sept départements.

Le Niger est membre: de l'OUA (Organisation de l'Unité Africaine)  
de la CEAO (Communauté Economique de l'Afrique de l'Ouest)  
de la CEE (Communauté Economique Européenne)  
dans le cadre du traité de Lomé  
de l'OCAM (Organisation Commune Africaine et Malgache)  
du Conseil de l'Entente.

### Section 1 - Situation économique actuelle

#### A - Finances et Budget

|                       |        |         |                  |
|-----------------------|--------|---------|------------------|
| Produit national brut | (1970) | environ | 95 milliards CFA |
| Revenu national       | "      | "       | 100 " CFA        |
| Revenu par capita     | "      | "       | 92 US dollars    |

Budget: en 1973, équilibré à 15,668 millions CFA

Commerce extérieur: le tableau ci-après fait apparaître le déséquilibre de la balance des paiements, tendant cependant vers un accroissement relatif des exportations dû à celles de l'uranium mais ralenti toutefois, en 1973, par les difficultés du marché de l'arachide.

(en millions de F CFA)

|              | 1970   | 1971   | 1972   | 1973   |
|--------------|--------|--------|--------|--------|
| Importations | 16,213 | 14,975 | 16,576 | 15,281 |
| Exportations | 8,795  | 10,670 | 13,712 | 12,698 |

Aide Extérieure - En 1972 (seuls chiffres disponibles) elle était de 41,323 millions CFA (dont une partie sous forme de subvention budgétaire destinée à amortir le déficit du budget et à financer une partie des investissements: total de 47,600 millions CFA pour la période 1971-1974). Cette aide se répartissait ainsi:

|              |                     |
|--------------|---------------------|
| FAC (France) | 15,834 millions CFA |
| FED          | 15,106 "            |
| CCCE         | 5,875 "             |
| IDA          | 2,461 "             |
| USAID        | 598 "               |



B - Les secteurs de l'économie

1. Agriculture. Est actuellement de très loin le secteur le plus important de l'économie. Elle est concentrée dans les régions sud et sud-ouest du territoire.

i) Principales cultures: campagne 1973/1974 (en tonnes)a) Cultures vivrières

|        |         |
|--------|---------|
| mil    | 626,938 |
| Sorgho | 126,134 |
| Riz    | 46,309  |
| Niébé  | 92,184  |
| Manioc | 155,897 |

b) Cultures industrielles

|               |        |
|---------------|--------|
| Arachides     | 77,056 |
| Coton         | 3,571  |
| Canne à sucre | 77,890 |

c) Cultures maraîchères (voir Chapitres V et VII)

- ii) L'Elevage: après l'arachide, c'est la seconde richesse du pays.

Effectif du cheptel (statistiques 1973 en chiffres globaux):

|           |           |
|-----------|-----------|
| Bovins    | 3,000,000 |
| Caprins   | 5,000,000 |
| Ovins     | 2,000,000 |
| Chameaux  | 300,000   |
| Chevaux   | 200,000   |
| Volailles | 7,000,000 |

Exportations enregistrées des produits d'élevage (1973)

|                | Animaux sur pied | Viandes (Kg) |
|----------------|------------------|--------------|
| <u>Bovins</u>  | 179,268          | 354,436      |
| <u>Caprins</u> | 76,528           | 74,125       |
| <u>Ovins</u>   | 38,615           | 88,100       |



Ces exportations correspondent à 16% du total des exportations nigériennes.

Pays acheteurs: Nigéria (85% des exportations)  
 Ghana  
 Dahomey  
 Togo

#### Cuirs et Peaux (1973)

|                      |         |           |
|----------------------|---------|-----------|
| Production (unités): | Bovins  | 209,000   |
|                      | Caprins | 1,264,000 |
|                      | Ovins   | 518,000   |

En 1973 les exportations de cuirs et peaux se sont élevées à 290 millions CFA (Chiffre d'affaires brut).

#### iii) Pêcheries (Fleuve Niger et Lac Tchad)

Elles constituent une ressource alimentaire substantielle pour la consommation locale (essentiellement dans le sud du pays).

Production annuelle: environ 10,000 tonnes

Exportations limitées, vers le Nigéria et le Ghana (en poisson séché - fumé).

#### 2. Industrie - De création récente, ce secteur est encore à l'état embryonnaire. Il comprend:

- industries agricoles (arachide - riz - millet - coton -)
- industries chimiques et manufacturières (savonnerie, tannerie, etc.)
- industries de la construction (ciment - briques - céramique)

#### 3. Ressources minérales

Les plus importantes se trouvent dans le Massif de l'Air au nord du pays. L'exploitation la plus ancienne est celle du minerai d'étain (cassitérite). En 1974 la production de cassitérite s'élevait à 140 tonnes de minerai concentré (à 70% de teneur en étain). La production actuelle est exportée, dans une proportion de 80%, vers la Belgique et le Royaume-Uni. Les réserves sont estimées à plus de 65,000 tonnes.

La découverte d'importants gisements d'uranium a changé sensiblement la physionomie de l'économie nigérienne, en faisant progresser le chiffre des exploitations au cours des dernières années.



Les gisements actuellement exploités se trouvent à Arlit (Département d'Agades) dans le massif de l'Aïr. Cette exploitation est sous la responsabilité de la Société Somaïr, à participation de capitaux français. Sa production actuelle est de l'ordre de 1,000 tonnes par an de minerai concentré (uranate). Il est prévu qu'elle sera doublée prochainement. Dans la même région, près d'Akouta, une autre exploitation d'uranium est prévue (à compter de 1979) dont sera responsable la société COMINAK à participation nigérienne, française et japonaise (production initiale prévue: 2,000 tonnes d'uranate). Enfin, à Djado, dans le Ténéré (au nord-est du territoire) la Société des Mines de Djado (participation allemande et japonaise) entrera en exploitation dans un avenir plus lointain.

Un certain potentiel de minerai de fer existe également (réserves de 200 millions de tonnes) ainsi que de tungstène et de cuivre.

Dans le sud et le sud-est du territoire des prospections pétrolières se poursuivent depuis plusieurs années (investissements de plus de 10 milliards CFA).

### Section 2 - Accords commerciaux

Le tableau ci-après fait apparaître les relations commerciales du Niger avec ses principaux partenaires au cours de l'année 1973 (en millions CFA):

| <u>Importations</u>                                   |       | <u>Exportations</u> |       |
|---|-------|---------------------|-------|
| France  | 6,585 | France              | 6,775 |
| USA   | 1,195 | Nigéria             | 2,931 |
| Allemagne (Féd.)                                      | 1,158 | Italie              | 727   |
| Nigéria   | 875   | Allemagne (Féd.)    | 710   |
| Côte d'Ivoire   | 580   | Royaume Uni         | 343   |
| Pays UDOA (Union<br>douanière de<br>l'ouest africain) | 247   | Dahomey             | 274   |
| Japon   | 110   | Pays UDOA           | 184   |

### Section 3 - Objectifs gouvernementaux

Ils ne font pas l'objet d'un Plan, mais apparaissent dans des Programmes Triennaux destinés à répartir les investissements par secteur d'activité. La préoccupation prioritaire reste, comme dans la plupart des pays du Sahel atteints et menacés par la sécheresse, le souci de satisfaire les besoins alimentaires de la population. L'accent est donc mis avant tout sur la production des cultures vivrières (céréales) et sur les ressources hydrauliques. De même des efforts sont poursuivis pour une exploitation rationnelle de l'élevage, destiné primordialement à la consommation locale.

Vaste territoire largement dépourvu de transports de surface, le Niger se préoccupe aussi de développer ses moyens de communications internes (réseaux routier et aérien) dans un but essentiellement national et administratif.



Sur le plan purement économique, le Gouvernement s'emploie à diversifier les productions agricoles de façon à ne pas dépendre uniquement des récoltes de l'arachide, dont la commercialisation subit trop fortement les fluctuations et les aléas des marchés mondiaux.

L'industrie naissante est orientée vers les activités de transformation, notamment celle des produits agricoles.

Enfin, heureusement doté de ressources minières, le Niger, en collaboration avec d'autres pays, poursuit l'exploitation et la prospection de son sous-sol.

## LE TOURISME

### Section 1 - Résumé des conditions actuelles

Le tourisme nigérien est polarisé sur deux régions: le massif de l'Aïr dans le nord-ouest du Pays, la région du fleuve Niger dans le département de Niamey. Le potentiel touristique tient sa valeur de:

- son authenticité (le folklore n'a subi aucun contact avec l'extérieur);
- son originalité: le massif de l'Aïr offre une grande gamme d'attraits
  - panoramiques
  - archéologiques (peintures rupestres, cimetière de dinosaures)
  - historiques (mosquée d'Agadès, ancienne capitale de l'Empire Touareg)
  - sources thermales de Tefadek
- sa variété:
  - la région du fleuve Niger est dotée d'une réserve d'animaux (réserve dite du W) qui se combine avec celles d'Arly en Haute-Volta et de Pandjari au Dahomey.

La ville de Niamey offre de plus un Musée National, aménagé en parc, d'un grand intérêt folklorique et scientifique.

### Section 2 - Services aériens commerciaux

Niamey est desservi par 4 compagnies aériennes internationales: Air Afrique, Air Algérie, Air Mali et UTA. Ces compagnies desservent 15 villes africaines: Abidjan, Alger, Bamako, Bobo-Dioulasso, Brazzaville, Cotonou, Dakar, Douala, Gao, Kinshasa, Lagos, Lomé, Mopti, Ouagadougou et Tombouctou. Air Afrique et UTA desservent Bordeaux, Marseille et Paris en DC-10 et DC8, quatre fois par semaine.

Air Niger, dans laquelle Air Afrique et UTA ont une participation minoritaire, dessert cinq villes de l'intérieur. Elle n'exploite actuellement aucun service international. Sa flotte se compose d'un DC4 et d'un DC3 et également, à sa demande, d'un DC6 qui appartient à la Présidence.

Enfin une petite compagnie privée, Transniger, effectue des vols à la demande à travers le territoire national.

Dans l'état présent du développement touristique au Niger ses services suffisent à satisfaire la plus grande partie de ses besoins.



### Section 3 - Installations au sol

Elles sont tout à fait insuffisantes et expliquent l'état de sous-développement de l'industrie touristique nigérienne.

L'ensemble du territoire ne peut actuellement offrir qu'une capacité de 500 lits (dont 370 à Niamey, 60 à Agadès et environ 50 dans les campements de la réserve W). Dans des conditions à peu près acceptables par les visiteurs étrangers, dont le nombre s'élevait lors de la dernière saison à environ 5,000.

Le personnel reste encore mal adapté à sa tâche et ses effectifs sont largement insuffisants.

Le réseau routier est tout à fait défectueux, constitué essentiellement par des pistes utilisables en Land-Rover.

### Section 4 - Circuits touristiques

Quelques circuits existent actuellement:

- au départ d'Agadès, par les soins d'une agence italienne qui organise des tours de 2 ou 3 jours dans le massif de l'Air et dans les oasis du Ténéré: randonnées en Land-Rover transportant les tentes de camping et un minimum de ravitaillement et d'équipement;

- dans la région de Niamey et la réserve du W, traversée par pirogues sur le fleuve Niger, et aménagée de quelques campements n'offrant une possibilité d'hébergement que pour une cinquantaine de personnes au total; ces derniers circuits sont presque tous organisés par les agences Transcap et Aéro 7 (UTA).

La saison touristique s'étend de novembre à avril.

### Section 5 - Marketing et promotion

Aucun degré de priorité n'est accordé au tourisme dans l'ordre des objectifs gouvernementaux: le budget annuel dont dispose le Directeur du Tourisme est de 11,500 Fr. CFA pour les besoins publicitaires.

Il est évident qu'avec une telle limitation de moyens aucune promotion efficace n'est possible en dehors de celles que peuvent faire les agences touristiques et les compagnies aériennes.

Une telle promotion ne serait d'ailleurs pas souhaitable tant que l'infrastructure hôtelière n'aura pas été substantiellement améliorée, ce qui dépend en grande partie de l'importance accordée par le Gouvernement à l'industrie touristique.

A cet égard il a été confirmé à la Mission que le Gouvernement n'entendait pas pour le moment faire d'efforts particuliers dans ce domaine.



## AGRICULTURE

### Section 1 - Résumé des conditions actuelles

L'agriculture nigérienne reste encore dominée par la culture de l'arachide, produite essentiellement dans l'est et le centre du pays. Elle constitue le principal produit agricole d'exportation. Sa production s'est trouvée récemment affectée par les années de sécheresse et par le transfert des surfaces cultivées au profit de la culture des denrées alimentaires: elle est ainsi passée de 256,475 tonnes en 1972 à 77,056 tonnes en 1974.

Pour satisfaire les besoins alimentaires de la population, le Gouvernement a fait porter ses efforts sur le développement des cultures vivrières (mil, sorgho, riz, niébé, manioc) qui occupent 90% des terres cultivées. Ces cultures ont également été affectées par la sécheresse ce qui a contraint le Niger à des importations massives de céréales afin de prévenir la famine: on estime à 300,000 tonnes les besoins en céréales de l'ensemble des deux dernières années.

Outre l'arachide le Niger produit deux autres cultures industrielles:

- le coton dont la production est en régression sous le double effet de la sécheresse et de l'orientation des cultivateurs vers les cultures vivrières;
- la canne à sucre, encore au stade expérimental.

Le troisième secteur est celui des cultures maraîchères, peu affectées par la sécheresse, dominées, en volume, par la production d'oignons (environ 30,000 tonnes par an) et celle des tomates (4,000 tonnes) en grande partie destinée à l'industrie de transformation (prévisions: 600 tonnes par an de concentré de tomates dans la nouvelle usine en construction).

### Section 2 - Produits horticoles pouvant justifier le transport par air

Ces produits (à l'état frais) donnent lieu, traditionnellement, à des exportations aériennes saisonnières, étalées de novembre à avril. La Société Nigérienne des Primeurs (SONIPRIM), Société d'Etat, est chargée de leur production et de leur commercialisation. Les pays clients sont: France, Belgique, Allemagne, Suisse, Hollande, Côte d'Ivoire.

Des négociations sont en cours avec le Gabon qui, en retour, exporterait au Niger des contre-plaqués et des fruits de mer. Le tableau ci-dessous indique le volume des exportations au cours des trois dernières campagnes (en tonnes).

|                | <u>72/73</u>   | <u>73/74</u>   | <u>74/75</u>   |
|----------------|----------------|----------------|----------------|
| Haricots verts | 163,000        | 256,124        | 132,500        |
| melons         | 30,204         | 13,534         | 35,800         |
| poivrons       | 18,128         | 4,966          | 32,000         |
| aubergines     | -              | 1,512          | 16,800         |
| Total          | <u>213,232</u> | <u>276,136</u> | <u>437,100</u> |



Projection pour campagne 75/76: 600 tonnes.

Ces exportations restent très inférieures à ce qu'elles pourraient être, comparées à celles des pays voisins: en 74/75, la Haute-Volta a exporté 1,700 tonnes de primeurs.

La commercialisation de ces productions est régulièrement déficitaire (sauf 72/73): le Chapitre VII ci-après analyse les raisons de ce déficit et recommande les solutions à apporter.

SONIPRIM se plaint des services inadéquats offerts par les Compagnies aériennes, Air Afrique en particulier (voir Chapitre VIII: Questions spéciales): horaires inadéquats - capacités limitées à 2 ou 3 tonnes les lundis et mercredis (seuls jours favorables aux expéditions sur l'Europe) tarifs non-dégressifs pour grosses expéditions (120 CFA/kg pour haricots verts). Sur ce point également, le Chapitre VII du Rapport formule une recommandation tendant à résorber ces difficultés (création d'un organe coordinateur, comparable au "Comité de Fret" institué à Dakar, en vue de coordonner les expéditions).

Un assainissement des conditions de commercialisation (création de nouveaux marchés - vente directe à la clientèle) et de celles de la gestion de SONIPRIM devrait faire des exportations des produits horticoles du Niger une source de revenus importante pour ce pays. Une fois réalisé, le niveau de production pourrait à son tour être considérablement accru, compte tenu des superficies de terres cultivables et des excellentes conditions naturelles. A ce potentiel s'ajouterait celui de conserveries (actuellement en projet) de légumes (haricots verts, petits pois, macédoine) et de fruits (jus, confitures).

Une usine de fabrication de concentré de tomates est en cours de construction (financement par la Banque de Développement du Niger). Sa production (estimée à 600 tonnes/an) serait principalement destinée à la consommation locale, mais elle pourrait donner lieu à un certain volume d'exportations.

A signaler enfin que SONIPRIM s'attache à produire elle-même ses propres semences, en raison de leur prix d'achat très élevé, et afin d'éviter les détériorations provoquées par leur importation.

### Section 3 - Elevage et produits de l'élevage pouvant justifier le transport par air

L'élevage constitue pour le Niger la seconde source importante de revenus agricoles.

Comme dans tous les pays du Sahel, le cheptel nigérien a été durement frappé par la sécheresse (les bovins, notamment, dans une proportion de 50%).

Bénéficiant d'une importante aide extérieure (multilatérale et bilatérale) la politique gouvernementale tend à restaurer (sur des bases moins traditionnelles) l'état du cheptel, à la fois quantitativement et qualitativement, par la création de parcs d'embouche, l'exploitation de ranches pour le regroupement des troupeaux (particulièrement dans les immenses étendues sahéliennes), la sélection des espèces, le contrôle sanitaire.



En 1973, l'effectif du cheptel s'élevait à environ:

|           |            |
|-----------|------------|
| 3,000,000 | de bovins  |
| 5,000,000 | de caprins |
| 2,000,000 | d'ovins    |

Ces chiffres ne correspondent qu'à la portion contrôlable de ce cheptel dont les effectifs réels ne peuvent être identifiés en raison de sa dissémination dans des régions inaccessibles et nomades. Au cours de la même année, les exportations enregistrées s'élevaient à:

|         | Animaux sur pied | Viandes (kg) |
|---------|------------------|--------------|
| bovins  | 179,268          | 354,436      |
| caprins | 76,528           | 74,125       |
| ovins   | 38,615           | 88,100       |

Les exportations sur pied (presque toutes à destination du Nigéria) ont été récemment interdites afin de faciliter la reconstitution du cheptel.

Le Gouvernement souhaite néanmoins maintenir le niveau total des exportations des produits de l'élevage afin de préserver leur avenir: les exportations de viande devraient donc compenser la réduction de celles des animaux sur pied.

La Société Nigérienne pour l'Exploitation des Ressources Animales (SONERAN) est chargée de la commercialisation des viandes. Son activité se heurte aux mêmes difficultés que celle de la SONIPRIM: insuffisance du "marketing" et déficience de la gestion. La même recommandation (formulée au Chapitre VII) vaut pour les deux entreprises.

Ces difficultés expliquent sans doute que les exportations de viande abattue soient passées de 684 tonnes en 1971 à 568 tonnes (chiffre probablement excessif) en 1974 alors que, dans la même période, les abattages augmentaient d'un tiers (de 3,300 à 4,400 tonnes). Depuis que les exportations de viande sur pied à destination du Nigéria (principal client traditionnel) ont été interdites, la presque totalité de la viande abattue est exportée sur la Côte d'Ivoire. De petites quantités de viande chevaline sont exportées en France. Les pays européens (à l'exception de la Suisse) refusent la viande des pays du Sahel pour raisons sanitaires: il est connu cependant que de la viande nigérienne bovine parvient en France, après avoir transité par l'Espagne et y avoir reçu les marques de garantie des contrôles sanitaires.

Faute d'une politique de "marketing" suivie, plusieurs marchés étrangers ont échappé au Niger (Libye, Liban, Nigéria, Antilles) ou sont négligés (Suisse, Congo).

Des marchés nouveaux pourraient être créés, surtout dans les pays de la côte ouest africaine tels que le Ghana, le Libéria et la Sierra Leone.

Les premiers efforts devraient être pour reprendre ou inaugurer ces marchés.



Les problèmes que pourrait poser leur desserte par avion seraient étudiés alors. Leur solution serait facilitée par une politique libérale d'octroi de droits de trafic (sur des destinations non desservies directement par Air Afrique afin que ses intérêts soient préservés) que le Gouvernement du Niger paraît prêt à adopter. Enfin, les productions d'une petite usine de découpage des viandes annexée à l'abattoir de Niamey ne pourraient que valoriser les exportations rendues, par ailleurs, mieux adaptées ainsi aux expéditions par les avions des lignes régulières.

#### Cuirs et Peaux

L'exploitation de ces denrées se trouve distribuée sous la responsabilité de trois sociétés:

La Société Nigérienne des Cuirs et Peaux (SNCP), société d'Etat;  
La Société Nigérienne des Tanneries (SONITAN), société mixte;  
La SOTAPO (tannerie), société privée.

Aucun lien, aucune coordination n'existe et n'est prévue entre ces trois entreprises dont les activités sont pourtant largement communes. Un tel défaut de structure est évidemment préjudiciable à ce secteur de l'économie nigérienne.

La production de la SNCP a baissé de façon régulière de 1973 (611 tonnes) à 1974 (377 tonnes) à 1975 (275 tonnes), évolution inexplicable (sinon par les déficiences déjà rencontrées de la gestion et de la commercialisation) lorsque l'on sait que pendant cette période le tonnage des abattages augmentait d'un tiers.

Une chute encore plus radicale frappait, en 1975, les exportations de peaux de chèvre de la SONITAN qui tombaient de 180 tonnes en 1974 à 75 tonnes en 1975.

Les exportations de cuirs (bovins) se font toutes, actuellement, par voie de surface (vers la France, l'Italie, l'Espagne, le Liban). Les peaux sont toutes exportées par avion, principalement vers la France (Paris, Lyon, Marseille, desservies par Air Afrique). En 1974, le total de ces ventes s'élevait à 350,508,800 CFA et portait sur environ 2,000,000 d'unités (210,000 cuirs - 520,000 moutons - 1,260,000 chèvres).

Il serait dans les intentions de la SNCP d'exporter à l'avenir des cuirs finis ou semi-finis ce qui, en les valorisant, les rendraient accessibles au transport par air surtout dans le cadre d'expéditions coordonnées, au départ du Niger.

#### Section 4 - Produits de la pêche pouvant justifier le transport par air

Il n'est pas envisageable, pour le moment, que le transport de ces produits puisse se faire par avion: ni le volume des prises (mal connu et estimé très approximativement à 10,000 tonnes par an) ni la qualité de leur préparation (séchage et fumure artisanaux) ne le justifient. Cette situation pourrait être améliorée (par exemple avec l'assistance de la FAO) mais, en vue d'éventuelles exportations par air, ces produits devraient pouvoir être transportés sur les aérodromes de départ ce qui est irréalisable dans les conditions actuelles des moyens de transport de surface.



INDUSTRIE

L'activité de ce secteur est encore extrêmement modeste. Elle intéresse principalement les industries de transformation des produits agricoles (arachide, riz, millet, coton) et celles de la construction (ciment, briques, céramique).

Le Chapitre V du présent rapport donne des détails sur les quelques exportations par air des produits industrialisés: ceux-ci se limitent, en fait, aux peaux tannées.

Si elles se développent, quantitativement et qualitativement, les agro-industries pourront donner lieu à des exportations par avion (conserveries de fruits et légumes - poisson fumé - artisanat - viandes découpées), notamment vers les marchés africains régionaux.



CONTRIBUTION POTENTIELLE DE L'AVIATION  
(Conclusions et Recommandations)

CONCLUSIONS

L'économie du Niger, encore à la phase initiale de son développement, peut tirer un bénéfice important de l'utilisation de l'avion, si toutes deux sont proprement adaptées l'une à l'autre. Les secteurs de cette économie susceptibles de bénéficier directement d'un tel avantage sont essentiellement:

L'Agriculture

Horticulture (produits maraîchers)  
Elevage (viande, cuirs et peaux)  
Pêcheries (capitaine fumé)  
Industries-agricoles (conserveries)

Le Tourisme

Le secteur aéronautique lui-même qui bénéficierait, en retour, des développements qu'il aurait favorisés. Mais pour que ce but soit atteint, un certain nombre de conditions devront être préalablement réalisées.

Section 1 - Secteur Agricole

a) Produits maraîchers

La Société d'Etat SONIPRIM a le monopole de leur production et de leur commercialisation.

- i) Production - Elle a été, au cours des quatre dernières années, en progression lente mais continue. Elle atteignait, en 1974/75, 437 tonnes, niveau cependant médiocre comparé à celui atteint dans les pays immédiatement voisins: cette même année, la Haute-Volta exportait 1700 tonnes de primeurs.
- ii) Commercialisation - Elle a été régulièrement déficitaire sauf en 72/73. Les raisons de ce déficit sont essentiellement:
  - La vente par consignation qui prive Soniprim de tout contrôle sur les conditions de vente à la clientèle. La Société se contente de prélever une marge bénéficiaire de 7,5% du prix CAF (335 CFA/kg pour les haricots verts achetés 80 CFA par Soniprim aux producteurs). Un tel écart devrait normalement laisser à la Société un bénéfice du double ou du triple, même avec vente par consignation. L'exemple ci-après montre que ce bénéfice pourrait être décuplé par vente directe à la clientèle: La Société malienne OPAM, qui utilise cette dernière formule, se réserve un bénéfice de 77% du prix CAF des primeurs (et des mangues) également exportés sur la France. Avec une marge bénéficiaire comparable,



SONIPRIM pourrait, chaque année, réaliser un bénéfice de 150.000.000 CFA (porté à  $\frac{1}{2}$  milliard CFA dans l'hypothèse d'une production égale à celle de la Haute-Volta).

- L'insuffisance des marchés - Depuis que la Sabena a suspendu ses services en avril 1975 (elle aurait l'intention de les reprendre bientôt) les primeurs du Niger ne sont exportés que vers la France d'où une partie est réacheminée sur l'Allemagne, la Belgique, les Pays-Bas et la Suisse, ce qui implique un transbordement, à Paris, de l'aéroport de Roissy à celui d'Orly, coûteux et dommageable au transport de denrées périssables.

En dehors de l'Europe, des marchés pourraient être recherchés en Afrique du Nord (Algérie - Libye), au Moyen-Orient et, surtout, dans les pays de la côte occidentale africaine, de Dakar à Brazzaville.

- La déficience de la gestion de Sonoprim (déplorée par son Directeur Général lui-même) et qui tient avant tout à un manque de personnel qualifié;
- l'absence de coordination avec les autres Sociétés d'Etat utilisatrices de l'avion et avec les entreprises de transport aérien.

#### b) Produits de l'Elevage

- i) Viande - La Société d'Etat SONERAN, responsable de la production de l'élevage et de sa commercialisation, n'en contrôle que 10%: réparti sur l'immense territoire, le cheptel et une grande partie de son commerce échappent au contrôle de l'Etat et sont donc très mal connus. En 1973 les effectifs étaient estimés à:

|         |             |
|---------|-------------|
| Bovins  | 3 millions  |
| Caprins | 5 millions  |
| Ovins   | 2 millions. |

Pendant la période 1972/75 alors que les abattages augmentaient, passant de 3300 tonnes à 4400, les exportations de viande diminuaient de 680 tonnes à 550 (chiffre probablement excessif). Evolution d'autant plus incompréhensible que, pendant cette période, apparaissait un nouveau client, la Libye qui, en trois mois, achetait 250 tonnes de carcasses, puis suspendait brusquement ses achats. De même était interrompu un essai, pourtant prometteur, d'exportation (par avion) de viande caprine sur les Antilles. Par ailleurs, des pourparlers avec le Liban étaient interrompus et aucune tentative ne semble avoir été faite pour les reprendre. Enfin, le Nigéria, jusqu'ici principal client du Niger, ne reçoit plus la viande nigérienne que par voie clandestine alors qu'il se serait porté officiellement acquéreur de viande abattue, le Niger ayant interdit les exportations de viande sur pied vers ce pays afin de protéger son cheptel.



Il n'est pas douteux que ces échecs successifs tiennent essentiellement à des défauts de gestion et à un manque d'initiative en matière de marketing et de commercialisation.

Cette situation devrait être redressée avant toute autre initiative.

Il va de soi que la Mission approuve celle d'aménager, à l'abattoir de Niamey, un atelier de découpage des viandes en morceaux de choix: sur les seules destinations desservies par avion au départ de Niamey, les marchés ne manqueront pas pour cette denrée valorisée, à commencer par les villes africaines côtières.

- ii) Cuirs et Peaux - Dans ce secteur encore, la production, placée sous la responsabilité de la Société d'Etat SNCP, diminuait entre 1973 et 1975, passant de 611 à 275 tonnes, alors que, comme on l'a vu, les abattages augmentaient d'un tiers pendant cette période. Plus brutalement encore, les exportations de la Société SONITAN, responsable des Tanneries nationales, enregistraient une chute incompréhensible, passant de 180 tonnes en 1974 à 75 tonnes en 1975. Il convient de signaler que les activités des deux sociétés d'Etat, SNCP et SONITAN, sont complètement séparées alors qu'elles devraient être à tout le moins coordonnées. La Mission ne peut qu'appuyer la décision du Gouvernement du Niger de faire appel à l'assistance d'un expert de la FAO chargé d'étudier les problèmes de commercialisation et de gestion de la SNCP dont la réforme s'impose.

- iii) Pêcheries - La production des pêcheries, encore au stade artisanal, reste modeste, étant limitée aux zones nigériennes du Fleuve Niger et du Lac Tchad.

On estime à 10.000 tonnes la production annuelle commercialisée qui donne lieu à des exportations non contrôlées de poisson séché-fumé vers le Nigéria.

Dans l'avenir, la valorisation de certaines espèces (fumure du "capitaine", rival du saumon) pourrait donner lieu à des exportations par avion vers les capitales africaines, celles de la côte notamment, et même vers l'Europe.

Des problèmes préalables se posent cependant: ceux de la technique et de l'infrastructure d'une petite industrie de transformation (qui pourrait être implantée près de N'guigmi, sur les bords du Lac Tchad) et ceux, avant tout, de l'acheminement du poisson sur les aéroports d'exportation.

Le moment venu, l'assistance de la FAO dans le domaine de la technologie et du marketing pourrait être demandée.

Aucune recommandation spécifique n'est toutefois formulée à ce stade par la Mission.



En résumé, la situation présente du secteur agricole commande que deux améliorations lui soient apportées: celle de la vente de ses produits selon des méthodes plus efficaces et sur de nouveaux marchés à l'étranger - celle de la gestion des entreprises chargées de leur production et de leur commercialisation. Cette double mesure devrait précéder, non suivre, tout effort nouveau tendant à augmenter la production tant que sa commercialisation reste déficitaire.

## Section 2 - Tourisme

Son développement reste léthargique bien qu'il soit en mesure de constituer un secteur économique précieux pour le pays. Il est handicapé par l'insuffisance, quantitative et qualitative de l'infrastructure hôtelière, et des moyens de transport de surface à l'intérieur des zones touristiques notamment. La Mission a pris note qu'il n'entraîne pas, pour le moment, dans les intentions du Gouvernement de promouvoir le Tourisme au Niger. Elle ne formule donc aucune recommandation particulière à ce sujet.

Elle appuie toutefois pleinement la tentative de coopération touristique entre le Niger et d'autres pays du Conseil de l'Entente (circuits combinés entre les réserves voisines du "W", de la Haute-Volta et du Dahomey). Elle estime qu'une telle politique, bénéfique du point de vue économique, culturel et socio-politique, devrait être poursuivie dans les cadres régionaux qui la permettent.

## Section 3 - Secteur Aéronautique

Le Chapitre VIII du présent Rapport traite dans le détail de la situation de ce secteur au Niger.

La Mission est parvenue aux conclusions suivantes:

- a) Les dessertes intercontinentales, essentiellement assurées par Air Afrique et UTA, satisfont à peu près aux besoins de l'économie nigérienne sur ces relations bien qu'elles n'y soient pas parfaitement adaptées faute de coordination avec les entreprises exportatrices, coordination dont ces dernières devraient se soucier.
- b) La Direction de l'Aéronautique Civile a présenté au Gouvernement un Projet triennal d'aménagement de l'infrastructure et de formation du personnel.

L'exécution de ce Projet dotera le Niger de moyens qui suffiront à satisfaire les besoins de l'exploitation des services aériens intérieurs et internationaux que devra utiliser l'économie nigérienne pour l'exportation de ses produits et pour le tourisme.

L'assistance de l'OACI, déjà acquise en matière de formation du personnel, pourra être sollicitée en matière d'infrastructure.



- c) Sous l'action avisée et efficace de son nouveau Directeur Général, la Société Air Niger est en cours de redressement rapide. Cette action vise essentiellement à éliminer le déficit financier de l'entreprise par l'accroissement du trafic (et, consécutivement, le relèvement du taux d'utilisation de la flotte, ruineux à son niveau actuel) obtenu grâce à une politique d'adaptation tarifaire aux possibilités de payment de la clientèle (particulièrement à l'intérieur du pays) tant pour les passagers que pour le fret.

La Mission, qui approuve entièrement cette politique, recommande que les autorités nigériennes fassent appel à un expert de l'OACI, chargé d'assister le Directeur Général d'Air Niger dans ce domaine.

- d) Dans son tracé actuel, la desserte aérienne du Niger ne contribue à "désenclaver" ce pays (comme la plupart des pays voisins) que sur les axes intercontinentaux Nord-Sud, les liaisons transversales n'étant, en grande partie, conçues qu'en fonction de ces axes et pour les servir. La Mission constate que la nécessité s'impose de plus en plus de services locaux conçus avant tout pour satisfaire les besoins propres des Etats d'une Région donnée aussi bien pour le déplacement des personnes (les populations de l'Afrique de l'Ouest ont des intérêts communs traditionnels, d'ordre familial, social et économique) que pour le transport des marchandises (produits maraîchers, viande) destiné notamment aux villes côtières. Elle estime que ce problème devrait d'ores et déjà retenir l'attention des Gouvernements africains éventuellement intéressés.

#### Section 4 - RECOMMANDATIONS

En vue d'apporter les solutions voulues aux difficultés indiquées plus haut, qui compromettent le développement de l'économie nigérienne utilisatrice de l'avion, et afin que ce développement puisse pleinement bénéficier de la contribution aéronautique, la Mission formule les recommandations ci-après.

##### RECOMMANDATION 1

Il est recommandé que le Gouvernement du Niger

- a) sollicite, par l'intermédiaire du PNUD, l'assistance de deux experts, respectivement chargés,

l'un: de prospecter les marchés extérieurs susceptibles d'importer les produits horticoles et ceux de l'élevage nigérien tant en Europe qu'au Moyen-Orient et sur le continent africain lui-même,

et de rechercher les méthodes de vente de ces produits, sur les marchés existants ou potentiels, les plus efficaces et les plus rémunératrices;



l'autre: de recommander les solutions tendant à réformer la gestion des entreprises nigériennes utilisatrices de l'avion de façon à la rendre économiquement et fonctionnellement plus efficace.

- b) établisse un "organe de coordination" réunissant périodiquement (par exemple une semaine sur deux) les représentants de ces entreprises et ceux des compagnies de transport aérien desservant le Niger de façon à ce que soient planifiés et normalisés, au mieux de l'économie nigérienne, les problèmes relatifs aux horaires, à la répartition des capacités et à la tarification des expéditions par air.

*Suite à donner: Les mesures proposées par cette recommandation étant susceptibles de procurer au Niger des revenus annuels supplémentaires de l'ordre de 150 millions CFA le Gouvernement Nigérien devrait demander sans tarder par l'intermédiaire du PNUD l'assistance de deux experts du Centre de Commerce Internationaux chargés d'une mission de trois mois chacun, soit six mois au total.*

## RECOMMANDATION 2

Il est recommandé que le Gouvernement du Niger sollicite l'assistance de deux experts de l'OACI qui seraient chargés:

- a) l'un d'évaluer la situation présente de l'infrastructure aéronautique du Niger et les moyens nécessaires à son amélioration;
- b) l'autre, de mettre au point, en collaboration avec le Directeur Général d'Air Niger, une structure tarifaire susceptible d'accroître le volume de trafic de cette entreprise, en vue de rentabiliser son exploitation.

*Suite à donner: Que le Gouvernement du Niger demande, par l'intermédiaire du PNUD, l'assistance de l'OACI pour l'envoi:*

- d'un expert en infrastructure aéronautique, pour une mission d'une durée de six mois;
- d'un économiste de Transport Aérien, spécialisé dans les gestions commerciales des compagnies aériennes, pour une mission d'une durée de un mois.



QUESTIONS SPECIALESSection 1 - Air Niger

Equipé d'un DC4 et d'un DC3, Air Niger dessert cinq villes de l'intérieur au départ de Niamey: Agadès, Arlit, Maradi, Tahoua et Zinder.

Sur la base de l'horaire actuel, le DC3 vole 13 heures par semaine et le DC4 10 heures. Si la proposition de la Société est approuvée par le Gouvernement, le DC4 sera vendu et remplacé par un DC6 convertible en une configuration "tout cargo".

En 1973/74 Air Niger a transporté 9115 passagers et 358 tonnes de fret. Le coefficient de remplissage passager n'a été que de 36%. Ces mauvais résultats sont probablement attribuables au niveau de tarif très élevé 34 CFA/km (26 cents US/mille).

La nouvelle Direction d'Air Niger est parfaitement au courant de ce problème et étudie actuellement les moyens d'introduire des tarifs réduits susceptibles d'augmenter le trafic passager. Avec une capacité disponible actuelle de 64%, la possibilité de remplacer le DC4 par un DC6, cette politique devrait à coup sûr être poursuivie. Le problème est encore aggravé par le fait que, à ces tarifs déjà élevés, le Gouvernement impose une taxe de 15% et un timbre de 125 Fr. CFA: ceci a probablement pour résultat de faire des tarifs d'Air Niger ceux parmi les plus élevés du monde.

Dans de telles conditions il n'est pas surprenant que la Compagnie ait enregistré une perte de 14 millions et demi CFA entre le 1er octobre 1974 et le 30 juin 1975 sur des recettes totales de 233,240,000 CFA (environ 1,2 millions \$ US). Avec seulement 570 passagers supplémentaires sur la route Niamey-Agadès, un tarif moitié du tarif actuel, ce déficit pourrait être comblé.

Pratiquement les seuls passagers d'Air Niger sont actuellement les fonctionnaires du Gouvernement et des hommes d'affaires. La population elle-même n'est pas en mesure d'utiliser l'avion. Le tourisme par ailleurs en souffre:

le tarif aérien Niamey-Agadès (porte du site touristique le plus riche du Niger) correspond presque à la moitié du tarif touristique Paris/Niamey.

L'utilisation de la flotte d'Air Niger est très basse:

- moins de 2 heures par jour. Les pilotes tous expatriés perçoivent un salaire élevé et sont payés sur la base d'un minimum de 80 heures de vol par mois, mais ils n'en effectuent que 40. Cette petite flotte pourrait être utilisée beaucoup plus efficacement si le trafic était augmenté. La solution pourrait être la mise en vigueur de tarifs différenciés destinés à attirer un nouveau marché de passagers.



Cette stratégie sera néanmoins d'une application difficile car:

- 1) le nouveau Directeur Général d'Air Niger, en place depuis seulement deux mois, est le seul cadre de la Société et ne peut consacrer beaucoup de temps à l'étude de nouveaux tarifs.
- 2) la Société ne dispose d'aucun autre personnel possédant une expérience commerciale quelconque.

La Mission pense que ce problème pourrait être rapidement résolu par une étude effectuée sur place (suivie de recommandations) par un expert de l'OACI affecté pendant une période d'un mois.

## Section 2 - Infrastructure

Un programme triennal détaillé visant à l'amélioration de l'infrastructure de l'Aéronautique du Niger a été présenté au Gouvernement par la Direction de l'Aéronautique Civile. Il porte essentiellement sur le renforcement de la piste d'Agadès en vue de l'utilisation des bi-réacteurs et l'installation d'un ILS; sur une amélioration des pistes de la région de Diffa qu'Air Niger ne peut pas desservir dans leur condition actuelle; sur le recrutement et la formation du personnel destiné aux fonctions techniques au sein de l'Administration aéronautique.

Un expert de l'OACI en matière de formation du personnel effectuera une mission au mois d'octobre 1975.

L'assistance de l'OACI (souhaitée à cet égard par le Directeur de l'Aéronautique civile) pourrait également être requise en matière d'infrastructure.

## Section 3 - Services aériens internationaux

Huit services aériens relient Niamey à des villes africaines où existent des marchés potentiels pour les produits horticoles et la viande du Niger: Abidjan, Alger, Brazzaville, Cotonou, Douala, Kinshasa, Lagos et Lomé. En raison de la duplication de ces produits il y a peu d'espoirs que les villes ci-après déjà desservies au départ de Niamey puissent constituer des marchés potentiels: Bamako, Bobo-Dioulasso, Dakar, Gao, Mopti, Ouagadougou et Tombouctou. Aucun service aérien n'existe au départ du Niger vers les pays comme la Sierra Leone, le Libéria ou le Ghana qui importent de la viande et des légumes en provenance de différentes parties du monde.

Niamey est relié à l'Europe 4 fois par semaine par Air Afrique et UTA. Toutefois, la France (Bordeaux, Marseille et Paris) est le seul pays européen desservi par ces compagnies. Ceci constitue un problème de logistique difficile pour les exportations de denrées nigériennes périssables à destination des autres marchés de l'Europe. Les deux Compagnies utilisent à Paris l'aéroport Charles De Gaulle, alors que la grande majorité des services à destination des villes européennes partent de l'aéroport d'Orly. Les denrées périssables doivent donc être transférées de Roissy à Orly, ce qui est à la fois coûteux et dommageable pour l'acheminement de ces denrées.



Jusqu'en avril 1975 un certain nombre de marchés européens importaient des produits horticoles du Niger grâce aux services de la SABENA qui les faisaient transiter sur l'aéroport de Bruxelles. Depuis cette date la Sabéna a réduit (provisoirement semble-t-il) ses services sur Niamey. Tant que d'autres compagnies aériennes n'auront pas établies de services directs entre Niamey et ces autres marchés européens, les exportations des denrées en question auront à souffrir.

Bien que, comme il est indiqué ci-dessus, Niamey soit relié à Paris 4 fois par semaine, deux de ces services arrivent à destination en fin de semaine, c'est-à-dire à un moment où les formalités de douane et par conséquent le réacheminement des produits horticoles sur d'autres marchés ne peuvent être effectués. Sur les deux autres services, un est exploité en DC8 33, qui ne dispose que d'une capacité cargo très limitée. En fait, le Niger ne dispose que d'un service et demi par semaine (et cela à destination d'un seul pays) sur lesquels des produits périssables peuvent être exportés.



|                            |   |
|----------------------------|---|
| M. A. ABDUHL WAHID         | Directeur Général Air Niger               |
| M. ALBENQUE                | Expert Développement Régional             |
| M. S.B. ALLADJI            | Directeur Général SONIPRIM                |
| M. A. CISSE                | Secrétaire Général Economie Rurale        |
| M. E. DANKASSOUA           | Directeur Industrie et Artisanat          |
| M. O. DIALLO               | Secrétaire Gal Direction des Mines        |
| M. A. DOSS                 | Représentant Résident Adjt PNUD           |
| M. M. ELOLA                | Représentant local, Air Afrique           |
| M. A.M. GOGÉ               | Directeur Aéronautique Civile             |
| M. P. HIDALGO              | Expert B I T                              |
| M. Y. IDE                  | Directeur Général SNCP                    |
| M. ILLO                    | Directeur de la Planification             |
| M. MAHAMANE                | Secrétaire d'Etat au Développement        |
| M. MALLET                  | Chef Mission B I T                        |
| M. I. MAYAKI               | Secrétaire Gal à la Présidence chargé     |
|                            | Affaires économiques, Commerce, Industrie |
| M. B. MOUSSA, Capt.        | Ministre Economie Rurale et Climat        |
| M. ORSIER                  | Expert B I T                              |
| M. A.H. ROTIVAL            | Représentant Résident du PNUD             |
| M. M. SALA, Chef Bataillon | Ministre Travaux Publics, Transports      |
|                            | et Urbanisme                              |
| M. SAMA                    | Directeur du Commerce                     |
| M. A. SANDA                | Directeur Commercial SONERAN              |
| M. R. SCHWOB               | Directeur Général NITEX                   |
| M. I. SEYFOU               | Directeur Tourisme et Hôtellerie          |
| M. S. SHARIF               | Program Officer PNUD                      |
| M. B. SUARD                | Directeur pour Niger, UTA                 |





UNDP/ICAO PROJECT  
RAF/74/021

TE 2102 ICAO



**STUDIES TO DETERMINE THE CONTRIBUTION  
THAT CIVIL AVIATION CAN MAKE TO THE  
DEVELOPMENT OF THE NATIONAL ECONOMIES  
OF AFRICAN STATES**

**NIGERIA**

**OCTOBER 1975**



REPORT ON MISSION

NIGERIA

*(from 11 August to 26 September 1975)*

In accordance with instructions received from ICAO Headquarters, this report is submitted to the Government without awaiting prior comments on its content by Headquarters, to avoid any undue delay which might otherwise be entailed.

The report was prepared by

F. Pratt, air transport economist and

N. Warner, air transport expert

under the direction of

N. Detière, Project Manager.



POTENTIAL CONTRIBUTION OF AVIATION TO AFRICAN ECONOMIESUNDP/ICAO PROJECT RAF/74/021

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## INTRODUCTION

### Section 1 - Description of the Project

1.1 The United Nations Development Programme (UNDP) approved this inter-country Project for Africa and designated the International Civil Aviation Organization (ICAO) as Executing Agency.

1.2 Participating Countries. Thirty-nine Countries are participating in the project on which separate reports have (or will be) issued. They are:

|                      |               |            |              |
|----------------------|---------------|------------|--------------|
| Angola               | Gabon         | Malawi     | Sierra Leone |
| Botswana             | Gambia        | Mali       | Somalia      |
| Burundi              | Ghana         | Mauritania | Swaziland    |
| Cameroon             | Guinea        | Mauritius  | Tanzania     |
| Central African Rep. | Guinea Bissau | Mozambique | Togo         |
| Chad                 | Ivory Coast   | Niger      | Uganda       |
| Congo                | Kenya         | Nigeria    | Upper Volta  |
| Dahomey              | Lesotho       | Rwanda     | Zaire        |
| Equatorial Guinea    | Liberia       | Sao Tomé   | Zambia       |
| Ethiopia             | Madagascar    | Senegal    |              |

1.3 Justification for the Project. In the explanatory submission proposing this Project, its justification was stated as follows:

This Project is designed

(1) to meet the recognized urgent need for civil aviation to make a more effective contribution to the development of the national economies of African States;

(2) to implement Recommendation S2-32 of the Second Plenary Session of the African Civil Aviation Commission (AFCAC), concerning the carrying out of an air transport survey of Africa, and to AFCAC's request that this survey be carried out as a UNDP/ICAO regional project;

(3) to propose specific, well-defined and well-costed projects in which aviation is a part which can assist the economic (and social) development of African States; and

(4) to meet in a practical manner certain aims expressed in the "Programme of Action for the Establishment of a new International Economic Order" adopted by the sixth Special Session of the United Nations General Assembly in 1974.



1.4 Scope of the Studies. In the same explanatory submission referred to in paragraph 1.3 above, the scope of the studies were summarized in the following major topics:

- (1) *the transportation of perishable commodities;*
- (2) *the development of intra-African transport;*
- (3) *the operation, management and rationalization of national and sub-regional activities; and*
- (4) *the advantages which tourism can bring to the economy.*

1.5 Objectives of the Project. The explanatory submission referred to in paragraphs 1.3 and 1.4 above lists the long-range objectives and the immediate objectives in the following terms:

A. LONG-RANGE OBJECTIVES

(1) *To assist in the development of economies of African States by taking advantage of air transport's lesser need for capital investment and greater flexibility than surface transport, to rectify some of the imbalance in the present African transport structure; to maximize benefits available from civil aviation by assisting African States in the preparation or revision of their national development plans.*

(2) *To meet in a practical manner certain aims expressed in the "Programme of Action for the Establishment of a new International Economic Order" adopted by the Sixth Special Session of the United Nations General Assembly in 1974, and particularly Sections I.1 (b), I.2 (b), I.4 (b), I.4 (e), and VII.1 (h).*

(3) *In preparing this long-range objective, Civil Aviation in Africa will be considerably strengthened.*

B. IMMEDIATE OBJECTIVES

(1) *To determine where and how air services can contribute effectively to the development of the economies of the African States. This determination should begin with an investigation of present and potential production of agricultural and other primary and secondary products, including a determination of how the development of air services could make these products salable in potential markets.*

(2) *To investigate the potential for tourism, including detailed cost/benefit studies concerning the net advantage to the country in terms of cash inflows and of employment creation. In this regard it will be necessary to determine acceptable market prices for all-inclusive tours, and to propose ways in which the transport and tourism infrastructures can be designed to meet these market prices.*



(3) To investigate the imbalance of intra-African transport routes, and to propose suitable rectifications.

(4) To examine uneconomic uses of air transport, such as under-utilization of aircraft, and to suggest various possibilities of cooperation between African governments to improve such utilization, and thereby to reduce the unit costs of transportation.

(5) To prepare, and propose to governments, pragmatic and realistic projects, backed by detailed cost/benefit estimations, and to suggest possible sources of financing.

(6) To initiate follow-up procedures with governments, or groups of governments, for carrying out the proposal referred to in the previous paragraph.

(7) To identify those interface facilities and those linkages or feeder services in surface transport which may need improvement for optimum effectiveness of air transport.

#### 1.6 Description of Project Activities.

1.6.1 The survey was conducted from 11 August to 26 September 1975 by Mr. F. Pratt (Air Transport Economist) and Mr. N. Warner (Air Transport Expert). The survey was directed by Dr. N. Detière (Project Manager) assisted by Mr. C. Van Diest (Executive Officer - Administration).

1.6.2 The Project, which is basically multi-disciplinary in character, required close cooperation with the various Specialized Agencies and bodies of the United Nations system. In particular, the survey benefitted from the expert advice given by the:

- Food and Agricultural Organization (FAO) on matters dealing with the production, quality and marketing of horticultural products, meat and fish;
- United Nations Office of Technical Cooperation (UNOTC) for questions related to surface transportation of agricultural and industrial products and also regarding the development of tourism; and
- United Nations Conference on Trade and Development (UNCTAD) (and the International Trade Centre) for expert advice on international trade questions based on the in-depth studies undertaken by UNCTAD on the production, valorization and export sales of African products.

1.6.3 It should be stressed that this Report constitutes only one element of the Project. In the second phase, solutions of a regional or sub-regional nature will be presented, in order to accommodate better the needs of the individual countries. The



recommendations offered to the Government of Nigeria are therefore offered on the understanding that they will be reconsidered in a broader regional context subsequently and with further contributions (inputs) from the other United Nations bodies.

## Section 2 - List of officials contacted

2.1 The ICAO Mission would like to express its gratitude to the various government departments for their cooperation and assistance to the Mission's efforts. This also applies to the several other officials contacted (both in the public and private sectors) and to the United Nations Resident Representative and his staff.

2.2 A full listing of individuals contacted has been given in Annex A.

## Section 3 - Other Matters

The Team arrived in Nigeria only days after the replacement of the Chief-of-State and many of the top Federal and State Government officials. Replacement of individuals in high positions continued throughout the stay of the Mission making contacts with Government difficult and often somewhat transitory. While most civil servants remained at their jobs, major changes at the policy making level made it difficult to obtain policy guidance or even basic background information because of Government's understandable preoccupation with matters of a much higher priority. Examples of this latter problem can be found in the facts that (a) it took over two weeks to arrange the first appointment with a government official and (b) the then Permanent Secretary of Civil Aviation /Chairman of Nigerian Airways was not even aware of this project when the Team interviewed him one month after its arrival.

When word of the change of government reached the Team in Accra, a message was sent to the UNDP Resident Representative in Lagos asking for advice as to whether the Team should continue to Nigeria as scheduled or abort the mission. His reply, recommending postponement of the mission, was not made known to the Team prior to its departure from Accra.

It is difficult to accurately assess at this time just what effect the recent change of government may have had on the success of this mission but it would be incorrect to assume that the recent political change was the basic reason for the Team's inability to identify many more worthwhile projects. Local conditions in Nigeria are not conducive to the development of air exports or the promotion of international tourism for reasons explained in Chapter III. While the long range potential for such developments is excellent, it is unlikely that near-term accomplishments in these areas will be of any great consequence unless there is a radical change in present conditions.



## SUMMARY OF FINDINGS

### Section 1 - General Economic Conditions

The growing balance of payments surplus arises from the rapid increase in oil exports. The clogging of local ports has led to a relative shortage of imports and a consequent rise in prices. Inflation has been further fuelled by the increase in money supply and the country's major capital development programmes.

The decline in non-oil exports has been accompanied by increased domestic consumption of all types of products. When this consumption demand has been met by expansion of domestic production and by increased imports, prices may be expected to fall. At that stage or earlier should the Government take measures to subsidize selected exporting non-oil exports could become more competitive.

### Section 2 - Tourism

Nigeria is virtually an unexplored country so far as major tourism is concerned, although it doubtless has many historic, cultural and other attractions. The main constraint on tourist promotion is the extremely high cost of accommodation and food at hotels of the tourist standard; and this will continue whilst the growing demand engendered mainly by the rapidly expanding business community continues to exceed the resources available. This problem is especially acute in the Lagos area, which also suffers from a lack of amenities (easy travel and communications, and cleanliness, etc) required by a major tourist industry. Additionally, it seems likely that the Federal policy will give priority to developing domestic tourism as a prelude to large scale international tourism.

Nevertheless, the Kano State Government has indicated a desire for United Nations OTC assistance in helping to draft plans for the international and domestic tourist and the promotion of Kano's tourist attractions both at home and abroad. It is suggested that the Government may wish to consider passing on such requests from States through the UNDP representative in Lagos for his further handling.

The Federal Government may wish to seek UNDP views on the best means of providing training in the catering, hotel and allied tourist industries.



### Section 3 - Agriculture

Nigeria's near term agricultural policies and programmes appear to be largely oriented toward self-sufficiency and expansion of traditional sea export crops such as cocoa, rubber, oil palm, cotton and groundnuts. There are no specific plans to expand export crops to include the more exotic products which can be air shipped to Europe such as pineapples, avocado pears, strawberries, beans and flowers. Considering current high prices in the Lagos area, there appears little possibility that local farmers will attempt to produce for export at this time; however, these air export crops could be grown on an experimental basis in some of the larger agricultural projects throughout the country such as the Kano River Project in Kano State.

The value of these exotic fruit and vegetable crops as foreign exchange earners has been well demonstrated in Senegal, Ivory Coast and Kenya. Furthermore, the large volume of unused capacity on northbound air services from Nigeria to Europe makes the production of these air-export crops a particularly attractive local venture at this time, since the airlines would probably offer shippers very low rates to develop this business.

Most of the shrimp caught in Nigeria waters is exported by sea to Japan and little, if any, is air-shipped to Europe. There appears to be no particular reason why the local shrimping industry cannot expand exports by air shipping shrimp to Europe as is done in other countries along the West African coast.

### Section 4 - Industry

There appears to be little incentive for local industry to produce for export while domestic demand is so great and domestic prices are so high. When port congestion is alleviated and imports can flow more freely, prices are likely to return to normal and industry may then find it desirable to resume export production. As the economy stabilizes and the present inflationary trend is halted, additional foreign capital should flow into industry to permit expansion of both domestic and export production capacity. Therefore, there appears to be little that Government can do to increase industrial exports until the present inflation can be curbed.

### Section 5 - Aviation

Nigeria has embarked upon a massive programme to up-grade its airports and civil aviation facilities. This programme will put great pressure upon the senior staff responsible. Considerable interest has been expressed in the assistance which ICAO might be able to provide in such matters as the development of managerial standards and techniques of administrative staff, and the widening of the experience and background of professional staff.

Nigeria Airways is also involved in a major expansion programme. The Government is aware of the managerial and possibly organizational strains which are arising, and it is continuing to consider the 1973 In-depth Study of the airline. The General Manager of the airline is definitely interested in the possibilities of ICAO assistance which might be available and the matter is now one for the Government to decide whether or not to pursue.



### GENERAL ECONOMIC CONDITIONS

Nigeria, with a population approaching seventy million, is not only Africa's most populous country but is well on its way to becoming the wealthiest. Discovery of oil along the south-east coast has had a profound impact on the country's economy and has set it apart from its less fortunate neighbours. In addition to being the world's sixth largest petroleum producer, Nigeria ranks first in the production of groundnuts, second in the production of cocoa and sixth in the production of natural rubber. Nigeria was also the leading exporter of palm kernels up until fairly recently but failure to properly exploit its wild groves and increased production on the part of other countries have reduced its world standing in the production of this commodity.

Approximately 70% of the nation's labour force is engaged in agriculture, forestry and fishing which represent approximately 35% of the gross domestic product but only around 10% of total export revenues. Less than half of the country's arable acreage is under cultivation and most farms are smaller than three acre plots although large scale farming is now being promoted. World Bank assisted projects costing some 87 million dollars are presently under negotiation or in progress to increase production of seed cotton, corn, peanuts and cow peas. Both British Overseas Development Authority and U.S. AID programmes are assisting in the preparation of soil maps and cereals research; however, little or no consideration has been given to the production of the more exotic fruits, vegetables and flowers which have an air export potential.

Nigerian industry has been largely oriented to self sufficiency rather than export. Manufacturing now contributes around 8% to the gross domestic product with textiles representing the largest single industry. Kaduna is the home of Africa's largest spinning and weaving mill. Generally speaking, however, the textile industry is somewhat depressed at this time due to slackness in demand and shortages in cotton, other raw materials and power due to the recent Sahelian drought. A degree of self-sufficiency has been achieved in the production of beverages, staples, tobacco products, footwear and wood furniture but most of these industries offer limited regional export potential because of their duplication in many other countries of West Africa. Some of the newer industries being developed or expanded such as oil refining, steel reinforcing rods, motor vehicle assembly, glass and petro-chemicals would appear to have greater promise of future export potential. It is also intended to develop an iron and steel industry.

In continuing attempts to encourage industry, import duties on raw materials necessary for local industries have been reduced to around 10%. Ad valorem and excise duties have been reduced to a maximum of 5% and import duties on building materials not produced locally, food products and consumer goods such as motor vehicles, spare parts, radios and televisions have also been reduced. The purpose behind many of these reductions has been to stem the effects of import inflation by enabling imported goods as well as local manufactures to be sold at more reasonable prices in the local market. Most customs duties on imports used in the manufacture of exported goods can be reclaimed under a customs draw back system but it takes time to obtain such refunds.

During the past four years Nigeria's foreign trade balance has improved dramatically. Total imports have grown at an average annual rate of less than 20% while exports, largely as a result of increased crude oil production and a 1974 - 1973 oil price increase of 177%, have grown at an average of about 53%. Current crude oil



production is running somewhere between 1.6 and 2.0 million barrels per day. At this depletion rate, proven recoverable reserves should sustain production for at least 30 to 40 years. Unless additional valuable natural resources are discovered in the meantime it would appear that Nigeria has that period of time in which to develop the country and reduce its dependency on petroleum exports.

In association with crude oil production, Nigeria produces approximately 2 billion cubic feet of natural gas per day. Most of this gas is now being flared but will be utilized in the near future in joint venture operations producing liquefied natural gas and petro-chemicals. Nigeria is also the world's chief supplier of columbite, found along with tin and used in the manufacture of heat resisting steels. Discovery of new lodges plus more efficient production methods should result in increased tin mining and smelting near Jos and Lirue with a corresponding increase in columbite production as well.

The Third National Development Plan (1975 - 1980) stresses developments in agriculture, industry, transportation, communications and utilities with capital improvements costing over (US) \$11 billion. While the Government welcomes foreign investment, it does reserve 22 specific types of enterprise for exclusive Nigerian ownership and another 33 types for minimum 40% Nigerian participation. Tax concession inducements are also offered to new limited liability Nigerian registered companies which are engaged in any of 31 "pioneer" industries.

Priorities in dealing with national problems and the shortage of suitable tourist facilities have delayed any local concentration on the development of tourism. It is unlikely that these restraints will entirely disappear in the near future; however, long term prospects for the development of tourism are considered good in view of the country's long cultural background and numerous areas of tourist interest.

It should be noted that although Nigeria is rapidly becoming a wealthy country, the per capita income is still very low considering its vast population. Every effort is being made to distribute the new found wealth throughout the country but it will take time before the benefits can be felt by people living in the more remote areas.

In the meantime, the country is going through a period of severe growing pains. The port of Lagos is inundated with imports bought with the growing oil revenues and congestion has reached the point that ships are having to wait outside the harbour for several months to get dock space to unload their cargoes. By latest count, over 400 ships are waiting to berth at the Lagos ports complex, 242 of which are carrying cement. The number of ships held outside the Lagos harbour awaiting berths has been steadily rising in spite of local efforts to make more wharf space and lighter berths available. Thus constriction in import movement has been a major cause in rising local inflation.

Lagos is made up of a series of islands and coastal areas connected by a very limited number of main roads and bridges. The recent increase in automobile registrations has resulted in horrendous traffic problems which turn the principal roads into long parking lots during rush hours. As the number of automobiles increases and businesses attempt to stagger employee working hours, the congestion simply spreads throughout the day. Phone service is very poor and lines are frequently out of order



for extended periods. This results in the necessity of using messenger services to maintain local communications which in turn adds to the burden on local roads.

Much of Nigeria's domestic development responsibilities are vested in state governments with funds allocated by the federal government. Overall planning is a major function of the federal government but implementation of local projects is frequently left to the state. Since Nigeria is comprised of twelve states, it has therefore been necessary to find or develop the many capable individuals needed to administer these various projects and properly control expenditure of the large sums of money allocated to them. Present changes in government have been largely aimed at strengthening the caliber of administrative personnel at both the state and federal levels. Government is also concerned with rising inflation and has already stepped in to control the local retail price of certain basic items.



## TOURISM

### Section 1 - Summary of Current Conditions

1.1 Nigeria's rapid development is reflected in an upsurge of domestic travel and demand for hotel accommodation. This demand is focussed at Lagos which is not only the state capital, but also the Federal Government and commercial capital of Nigeria.

Like internal travel demand, external travel is fast growing (108,000 and 154,000 arrivals in 1971 and 1972 respectively, of which over 70% were by air) and is mainly government or business traffic. It is likely that less than 5% of international arrivals are of tourists, if one defines a tourist as a person paying for a vacation out of his own personal resources.

1.2 Thus Nigeria is not on the tourist map.

But the Government intends to promote tourism. The Third National Development Plan 1975-1980 foresees capital expenditure of some EN150 million by the Federal Government and EN110 million by the 12 State Governments on tourist facilities. The nature of these expenditures is shown in Annex E. These official expenditures may well be under-stated, and of course, they do not include private sector investment.

1.3 Federal Government policy on tourism has yet to be fleshed out, but its essentials are:

- i) firstly, the generation of domestic tourism to establish centres of interest and develop the infrastructure, whilst not discouraging international tourism;
- ii) secondly, when the country is capable of handling it, the encouragement of international arrival tourism. Initially, Nigeria may be treated as part of the international circuit, but as progress is made, it is to be expected that Nigeria will be promoted as a destination in its own right;

Understandably, the encouragement of external tourism does not figure in official policy.

1.4 Thus one might expect the tourist flow to Nigeria to be significant in two or three years time (G.I.T. etc) and of major proportions a year or two later (I.T.C.). There is an impression that the Government is firmly controlling international scheduled frequencies pending the strengthening of Nigeria Airways.

However, the demand timetable may be compressed by two significant developments. Firstly, the External Affairs Minister has taken steps to unclog the issue of passports to Nigerians. The demand is high and the external travel allowance of EN1,000 per person acceptable. Secondly, if the postponed Festival of Arts and Culture is held (1977 is a suggested date) then it will attract 100,000 to 250,000 overseas visitors in a relatively short period and this will imply substantial charter activity. The Second International Trade Fair is an already scheduled attraction of 1977.



1.5 The Nigerian Tourist Association, founded by its Director General Mr. A. Atigbi in 1963, although enjoying official support has had neither the money nor authority to promote and direct development. The need for a powerful body has been recognized for some time, and since early 1974 the Association has been under the wing of the Federal Ministry of Trade, pending the expected promulgation of a decree converting it into an effective Tourist Board. A limited Project of UNOTC Technical Assistance to Nigeria is to be undertaken.

## Section 2 - General Transport Facilities

2.1 Bearing in mind Nigeria's longstanding association with international tourist official organizations the Board will be in a strong position to relate the development of internal tourism with general social progress.

Nigeria has a strong public air transport system and the Board will be aware of the need to obtain reliable air block bookings at appropriate prices. It may also promote the extension of air or ground services as necessary - in this connection it might be mentioned that according to the 1963 census well over 200 towns in Nigeria (some of which were parts of conurbations) had over 20,000 inhabitants. So far there are firm plans to bring only 15 airports up to B-737 standards, and no definite plans for the use of the less than a score of strips which are to be rehabilitated.

2.2 Nigeria has no need of a tourist bus system at the moment - when the requirement arises the Board is expected to have the power to provide such a system should private enterprise find the risk too great.

## Section 3 - Ground Facilities

3.1 The Board may be expected to assist Nigeria generally in what have been described as:

Supply - infrastructure, attraction of developers, planning resort areas, protection of attractions, setting of standards, co-ordination of resources, etc;

Demand - market surveys, distribution, promotion, collaboration, publicity and information; and

Finance - feasibility studies, investment (both domestic and foreign).

3.2 It is unnecessary to explore those areas in this paper, but it is worth noting that the Board will probably insist at an early stage upon the grading of hotels and restaurants in Nigeria - currently, the visitor receives no official guidance whatsoever. It may well give attention to "facilitation" at international airports which is below the standards that might have been expected after this interval from the Civil War. A good sign is the determination of the authorities to clamp down on Customs irregularities. Perhaps in due course the issue of visas will be accelerated and the visa-less arrival may not be virtually automatically turned away from Nigeria.



3.3 In general the road system is of a high standard. Railways are not for tourists.

3.4 The journey to and from the Lagos, Victoria and Ikoyi Island hotels to Ikeja takes between 45 minutes and 3 hours or more and the incidence of delay is unpredictable. The continuing improvement of the urban road system should greatly reduce this difficulty within a couple of years. Perhaps rather more serious is the apparent risk to public health which the visitor to the great conurbation of Lagos may see in the piles of refuse and the sewage problem. It is to be hoped that the authorities will deal with this risk if it is as serious as many visitors appear to believe.

3.5 It appears that two main types of accommodation are now being built throughout the main towns of Nigeria - the near-luxury and the below normal tourist standard. A noticeable feature of many State programmes is the development of intermediate standard accommodation. One estimate is that there may be some 2,000 beds in the Lagos area, and 7,000 in the rest of Nigeria of tourist standard.

There is no doubt that the hotel industry has great faith in the future of Lagos. Exhibit 2 gives a broad idea of the accommodation available for the tourist in the area, and current known plans. The list is not necessarily exhaustive but has been compiled on the basis of local advice. Occupancy rates, except perhaps for the fortnight about Christmas, appear to be limited only to the temporary closures required by the maintenance standards of the establishment. Current demand is so high that the single guest will normally be charged for the double room if he occupies one, and advanced deposits are frequently required of guests. Discounts are admitted at only one of the hotels on the list.

3.6 Currently, it would appear that there is only one "national" hotel chain in Nigeria, namely the federally owned Nigeria Hotels. They have recently surrendered their management contracts at Sokoto and Maiduguri, and now operate the Ikoyi and Bristol in Lagos, the Central in Kano, and the Premier and Lafia in Ibadan. Rates are uniform throughout the group. However, at least one private company is progressively expanding its operations as management resources permit.

3.7 It is understood that many international chains are seeking management contracts, if not participation, in the growing Nigerian hotel industry.

#### Section 4 - Tour Development

4.1 Opinions vary on how and where tourism will develop - and who can be sure that that which will attract nationals will also attract foreigners. There is a general desire for the proposed Tourist Board as it will resolve such fundamental problems as these, enforce standards and, in short, produce and enforce a coherent national tourist policy. To our knowledge, no company operates regular tours within Nigeria. Even in the obvious day tour market at Lagos special arrangements have to be made simply because the duration of a tour cannot be accurately forecast.

4.2 Nigeria has many attractions and is developing more but few are commonly thought to be suitable for long stays. The probability, therefore, seems to be that initial international tourism is likely to be up-market, requiring considerable transportation and organization.



4.3 This brings the discussion to the vital question of cost. Double occupancy of a room in Lagos costs some EN15 per head per day. To that must be added food of the order of EN14 daily. Up country prices are not necessarily much lower. Data on building costs are not easily obtainable, but probably EN30,000 per room is a modest figure for a luxury hotel and EN20,000 per room is likely for a simple hotel. The suggestion is that EN15,000 per unit may turn out to be the price of a holiday village accommodation. The foreign exchange national currency ratio of expenditure on building should be better in Nigeria than in most African countries, and one could hazard a range of say 60:40 to 40:60 depending upon the type of structure. The staff level of 1 guest : 2 staff in first class hotels can probably be reduced to 1:1 in simpler accommodation. The food cost ratio of 60:40 for imported and locally produced food which applies in the better hotel restaurants (after making allowance for import tax exemptions) would presumably be improved in favour of local production in favourable circumstances.

4.4 Where pronounced seasonality appears thus lowering occupancy rates, the problem of profitably developing a mass market increases.

4.5 Other countries have met this problem by developing a seasonal rate structure and offering favourable exchange rates to the tourist.

## Section 5 - Other Matters

### 5.1 State Tourism

5.1.1 Each state has tourist potential, but of course the states differ in the steps they have taken to realize that potential. Kano State, for example, wants UN assistance in preparing a plan for domestic and international tourism in the State. This involves such matters as:

1. an inventory of tourist attractions;
2. development of tourist facilities - hotels, prices, gamepark, local tours, handicrafts, personnel development, preservation, presentation, etc;
3. establishing a Kano State tourist identity both at home and abroad - brochures, representation, promotion in general.

Once the ball starts rolling, the Federal Tourist Board may expect considerable demands to be made upon it by the various states.

### 5.2 Training of Personnel

5.2.1 Even though each hotel group runs its own in-house training, and there are some limited schools available, it was generally considered that a national school(s) should be established for the catering and hotel industry, both to improve standards generally and to meet the large demands of the future. The most urgent requirement is training in craft and supervisory work, and the establishment of nationally recognized standards.



More advanced training is not such an urgent requirement, and could be provided later once the groundwork had been completed thoroughly.

5.2.2 There was also some belief that training in other tourist work - couriers, etc, should be organized in advance of the inevitable requirement.



## AGRICULTURAL PRODUCTS

### Section 1 - Summary of Current Conditions

Nigeria has great potential for agricultural development in that only about 84 million acres of its 175 million acres of cultivable land are presently being utilized. Growing population is placing a greater burden on food production and there is a desire on the part of Government to achieve some degree of self-sufficiency in the not too distant future. However, generally low earnings combined with the drudgery of farm work result in a continuing rural urban migration of workers which further compounds the problem of seasonal rural labour shortages. The Federal Government is working closely with the States to expand the nation's agriculture and there are a number of sizeable new projects springing up around the country.

The Country's cattle population is around 8.5 million head, located mainly in the northern states which are relatively free of tse-tse fly. Sheep, poultry and goats are raised throughout the country and provide an important part of Nigeria's meat supply; pigs are also raised in the southern areas. Cattle imports amounted to about 287,000 head in 1974 and may continue for some time in as much as tse-tse fly and other diseases severely limit livestock expansion.

The Government has earmarked some 165 million dollars for fishery improvement and expansion in the Development Plan in an attempt to increase annual domestic production to about 1.2 million tons by 1980. Even at that level, imports will probably run around .45 million tons. In spite of the desire for self sufficiency in fish, the Government does recognize the desirability of expanding shrimp exports as a means of earning foreign exchange.

In brief, the Government intends to spend about 3.56 billion dollars on capital expenditures in the agricultural sector during the Third Development Plan period 1975 - 1980.

### Section 2 - Horticultural Commodities Warranting Air Shipment Consideration

With the possible exception of 1,000 to 2,000 tons of vegetables which are shipped annually to the United Kingdom for consumption by the African community residing there, few agricultural products are exported from Nigeria by air. It might be possible to air-export pineapples to Europe from Lagos at some later date if and when the production and harvesting of this crop could be accomplished on an organized basis and local labour costs were not excessive. While it might also be possible to develop other export crops in the Lagos area, the probabilities of such development would appear to be somewhat better in the area around Kano because of climatic conditions and local concentration on horticulture. There is direct air service to European cities from either Lagos or Kano, and there should be a considerable amount of unused cargo space on most of the northbound flights.

Producers wishing to investigate these export possibilities further should contact international airlines serving either or both of these Nigerian cities to determine what commodity rates have been or could be established for their shipments and what assistance the airline can offer in helping them to find foreign buyers for their products.



At the present time, Nigeria imports a small amount of fresh fruits and vegetables; however, local plans to expand current production should make the country more self-sufficient and the long term opportunities for African states to export these commodities to Nigeria would not appear very favourable.

## 2.1 Kano River Project

This project is of particular interest to the team in as much as it is located in the general area of Kano Airport. This is the only northern Nigerian port of entry capable of handling most international equipment today and will soon be expanded to B-747 capability.

The Kano River Project is a Kano State agricultural development scheme involving the ultimate irrigation and cultivation of 180,000 acres over a 15 to 20 year period. Control of this project by State or Federal Government has not as yet been fully established; however, Kano State has to date invested some \$34,000,000 in its development. A large dam, the Tiga, has been constructed and the first of three 60,000 acre stages has been started. It is of interest to note that all work on the dam was provided by direct government labour and outside contracts were limited to consulting activities. A hydro-electric generating plant with a 20 MW capacity is soon to be added.

Some 10,000 acres have already been levelled and the irrigation system now covers about 2,500 of these acres. It is planned to develop 5,000 or more acres each year and finish the first stage by about 1982. Present estimates of the development costs for this first 60,000 acre stage are in the neighbourhood of \$160,000,000 and negotiations are presently underway with the World Bank to assist in this financing, although most of the money will probably be provided by Kano State.

Present plans provide for the planting of basic, traditional crops such as guinea corn, millets and groundnuts. In addition, certain experimental crops of wheat, rice, cotton and sugar cane and vegetables such as tomatoes, onions and potatoes will be grown in limited quantities along with mangoes and dates. It will be possible to also grow a number of other fruits and vegetables such as grapes, guavas, avocados, strawberries, beans, peas, cabbages, carrots and radishes. The growing of flowers is still another possibility. Since the normal growing season for the Kano area is from October to March, products grown there could be exported to Europe during the winter season when horticultural imports are in great demand.

The Kano State Government is well aware of the Project's export potential and would like to be supplied with an up-to-date listing of current European market prices for the various produce which could be grown in the Kano River Project. They would also like to have any grade specifications which are related to the pricing. It would be their intention to examine the list of exotic European horticultural imports to determine which items could be most easily and profitably grown along with the various subsistence products which would have first priority. The State already has financing and cooperative assistance machinery for farmers and could easily add marketing, technical assistance, grading and collection facilities with FAO assistance if required. Development of the Kano River Project includes the construction of a road network to provide easy access to the area and the only further developments needed in the way of export infrastructure might be collecting, grading, warehousing and cool storage facilities at the Kano Airport.



The Kano River Project would appear to represent Nigeria's earliest potential for meaningful horticultural export, although, similar projects in other parts of Nigeria are either under development or planned. These other projects will be of greater export potential as the airports serving them are improved and certificated for international operations so as to eliminate transfer from domestic to international air services.

### Section 3 - Seafood Products Warranting Air Shipment Consideration

Fish are abundant along the 600 mile coastline and Nigeria licenses approximately 150 commercial fishing boats, varying from 10 to over 3,500 gross tons, to fish both territorial and deep sea waters. The total annual local catch approximates 750,000 metric tons from both inland and coastal sources which falls some 250,000 tons short of satisfying local needs. Government is making serious efforts to expand the fishing industry in anticipation of a growing local demand which will reach 1.5 million tons per year by 1980.

While most of the fish landed in Nigeria are sold on the local market, a considerable amount of shrimp is exported annually. During 1974 some 36 shrimpers ranging from 100 to 180 gross tons were licensed to fish in territorial waters and their production was estimated at approximately 2,000 metric tons of shrimp along with 2,600 tons of fish. The shrimp catch per vessel/day averaged 246 kg for the year with the high season (February through August) at about 289 kg and the low season at about 188 kg. Recent surveys indicate that Nigeria's territorial waters can sustain a yield of 5,500 metric tons of shrimp per annum. At a current average F.O.B. wholesale price of \$4.50 per kg, this could represent an export potential of around \$25 million annually from shrimp alone.

Present shrimp exports are routed via sea transport; however, it would appear quite practical to tap air markets as well since air shipment costs are likely to be relatively low in view of the large volume of unused capacity which presently exists on flights operating northbound out of Nigeria. A commodity rate in the range of \$1.45 to \$1.50 per kg should be possible on air shipments of 500 kg or more to New York. Similar volume shipments to London might run as low as \$0.65 to \$0.70 per kg.

Shrimps exported to Japan are processed somewhat differently from those to the U.S. in that the heads are left on rather than removed. The shrimp are frozen in 2 kg blocks rather than 5 lb blocks and packaged into 6 block cartons rather than 10 block cartons. The Osadjere Fishing Co. of the Ibru Group is a joint venture operation combining the local Nigerian 'Ibru Group' and the large Japanese 'Taiyo Fishing Co Ltd'. This company presently exports around 80 metric tons (gross weight) of shrimp each month to Japan. The Japanese wholesale market price averages \$4.50 per kg and sea transport from Lagos to Japan costs approximately 50¢ per kg. Osadjere also follows the New York market prices closely and would like to supply that market as well. One of the difficulties lies in the fact that the New York market's wholesale price is around \$4.00 per kg and, since this price relates to beheaded shrimp, involves about half again as many shrimp per kg as does the Japanese market where weight includes heads.

The Osadjere Co. runs 9 Japanese type (180 gross ton average) shrimpers and will add two more vessels to their fleet in the near future. It is estimated that the breakeven catch for this type of boat is approximately 300 kgs per vessel day. The shrimp are beheaded and contact-frozen at  $-45^{\circ}\text{C}$  into 2 kg blocks. The blocks are then



brought to land where they are packaged into 6 block cartons weighing about 18 kg and held in storage at  $-30^{\circ}\text{C}$  awaiting sea export.

The Eko-Nippon Fishing Co. Ltd, is a Lagos based joint Nigerian-Japanese shrimping venture which produces exclusively for the Japanese market under contract. It operates 8 shrimp boats of the Japanese type with a catch running in the neighbourhood of 700 tons annually which is exported by sea.

This year has been another poor year for shrimping along the Nigerian coast and, as a result, several more of the larger shrimping companies based in and around Lagos have changed over from shrimping to conventional fishing. Most of the shrimp caught are now sea-shipped to Japan. A total export of frozen or dried crustacea to Japan in the first quarter of 1974 amounted 731.5 tons, with another 12.7 tons going to the United Kingdom.

Like much of Nigeria's non-petroleum export production, shrimping appears to be on a downward curve and there are far fewer local companies in this business today than in past years. Considering the potential export value of shrimp, it would appear highly desirable for the Government to take immediate action to curb this decline in local shrimping activity and revitalize this industry. Two principal problems appear to be (a) the difficulty of sea shipment as a result of local port congestion and (b) the drain-off of profits through the cumbersome overseas distribution system. Air shipment is a practical answer to the first of these problems provided something can also be done to alleviate the second problem, namely, streamlining the present overseas distribution procedure to offset additional air shipment costs.

Air shipments could be made in 500 or 1,000 kg lots, which might then be easily absorbed on a weekly basis by individual hotel, restaurant or store chains in principal foreign cities such as Paris, London and New York. Either foreign financial institutions with local branches in Lagos or major international airlines could provide the necessary assistance to local industry in making these overseas contacts. Since a weekly shipment to any one chain would be relatively small requiring few handling or storage problems, there should be no need to put it through the normal distribution chain at destination which would apply to large sea shipments of 70 or 80 tons. The saving of handling fees in this streamlined distribution method should more than off-set any difference in transportation cost between sea and air since it cuts the 'producer-exporter-importer-distributor-wholesaler-retailer-consumer' chain down to a basic producer-consumer relationship with the airline in between. Government can help local shrimping companies to build new export markets by assisting in the financing of new equipment and continuing local fishing research. It may be desirable at some future date to consider the development of some sort of marketing machinery to handle large contracts which cannot be supplied by a single local company and to provide up to date marketing information for the industry. United Nations agencies could be of help to Government in this work when the time comes.

#### Section 4 - Livestock and Livestock Products Warranting Air Shipment Consideration

Domestic meat production is estimated to provide about 75% to 80% of Nigeria's total consumption. During the recent drought, cattle losses were in the neighbourhood of 20% to 25% of the herd but much of this loss was offset by increase in the goat and sheep population. Following are Nigerian livestock population estimates indicating changes in herds over the past decade:



|         | <u>Estimated Population (millions)</u> |             |             |             |
|---------|--|-------------|-------------|-------------|
|         | <u>1963</u>                            | <u>1971</u> | <u>1973</u> | <u>1974</u> |
| Cattle  | 11.2                                   | 9.6         | 8.4         | 8.5         |
| Goats   | 25.0                                   | 17.0        | 29.0        | 22.0        |
| Sheep   | 8.0                                    | 6.0         | 20.0        | 8.0         |
| Pigs    | N.A.                                   | N.A.        | N.A.        | 0.5         |
| Poultry | N.A.                                   | N.A.        | N.A.        | 50.0        |

Most of the cattle imports come over the northern border on the hoof. Estimated current annual imports are in the order of 300,000 cattle, 250,000 sheep and 150,000 goats. The animals are normally driven or trucked to the consumption area and slaughtered for immediate sale. There appears to be little chance that Nigeria will reach self-sufficiency in meat production for some time and must therefore continue to import from the Sahel region.

Apparently Niger and Chad are stopping the export of cattle on the hoof and will butcher locally and export the meat by surface or air transport. In view of the distance and road conditions, there may be some prospects for air shipment of chilled meat from these northern countries to the southern parts of Nigeria. Volume of such imports are estimated to run about 40,000 tons annually, or over 10 tons per day. A major problem with new method of meat import is that Nigeria's import tax on meat is around 50% whereas there is no tax on the import of animals. It is hoped that this latter condition can be corrected within the framework of ECOWAS for the benefit of all concerned.

Another difficulty in the air shipment of meat from Chad or Niger to Lagos is the shortage of southbound air space which means a separate charter operation. It is not presently known whether the meat can bear the round trip cost of air shipment or whether the ability to utilize air will depend on whether it is possible to find north-bound cargo to cover a portion of the round trip expense.



## INDUSTRIAL AND OTHER PRODUCTS

### Section 1 - Manufacturing

Nigeria's light industry produces very little for export since domestic demand for manufactured products is growing so rapidly that it tends to outstrip present production capacities. Increase in domestic demand has also been accompanied by a rapid increase in prices. This local price rise, resulting from increasing wages, higher costs of services and higher profit margins, now makes domestic sales much more profitable than export sales so there is little or no incentive to produce for export. In brief, local industry has priced itself out of foreign markets and is either unable or unwilling to meet competition abroad.

The solution to present export inhibitions is a matter which warrants serious study by both Government and private industry. A part of the problem may stem from industry's strong desire to capitalize on current domestic demands by maximizing profits; however, a part of the responsibility for increased costs also lies with Government. Inability to provide proper transport facilities and control port congestion has resulted in curtailment in the flow of raw material imports used in local manufacturing and the necessity for industry to stockpile these raw materials in order to maintain continuous production. Inability to control the price of domestic raw materials such as cotton has resulted in the local price rising well above the world market price. These factors along with increased prices for utilities such as electricity, water, telephone and postal services all contribute to a higher cost of manufacturing which in turn inhibits export. An example of present export restriction can be found in the fact that Nigeria's large textile industry, which consists of some 25 or 30 individual manufacturing firms, does not produce much for export these days although it has the technical capability to produce the kind and quality of goods required by the European and American markets.

In as much as the Export Promotion Council is being created and should be fully functioning within the next year or so, this will be the proper body to consider the problems outlined above. An export oriented Trade Information Centre could also be a very helpful tool for the local producer. Certainly, the United Nations Conference on Trade and Development (UNCTAD) and the International Trade Centre in Geneva (ITC) could be of some assistance in establishing these local organizations and perhaps provide certain continuing services.

In addition to the possibility of subsidizing certain locally produced raw materials for use in export manufacture, the Government might also consider replacing the present draw back system of guaranteeing customs duties with a bonded system to eliminate the need for the manufacturer to advance duties on those imports which are used in local export production.

Some of the points mentioned in the foregoing paragraphs are covered in the Third National Development Plan (1975 - 1980). However, they have been relisted here to emphasize the need for immediate Government action to correct the current decline in non-petroleum exports since this trend cannot be allowed to continue without serious long range damage to the economy.



## Section 2 - Natural Resources

Petroleum is the country's greatest export earner, accounting for over 92% of total export value in 1974. Crude is lifted from some 900 on and off-shore wells in a 33,000 square mile concessioned area. Refinery facilities at Port Harcourt produce nearly 490,000 tons of gasoline and residuals annually and supply over 85% of domestic requirements.

In addition to petroleum, Nigeria mines tin, limestone, columbite, coal and to a limited degree tantalite, clay, marble, salt, lead, gold, monazite, lignite, wolfram, molybdenite and zircon. However, none of these minerals are mined in sufficient volume to be of any substantial export value at this time.

Approximately one third of the country's total land area is in forests supporting a variety of some 600 tree species. Actual forest reserves cover approximately 37,000 square miles. Total industrial wood available is estimated at 16,951 million board feet and current consumption amounts to approximately 635 million board feet per year. It is estimated, however, that domestic building construction demand may necessitate a considerable increase in the annual harvest and, under such conditions, these wood reserves might not last more than 15 or 16 years. The Government is embarking on an intensive planting programme of fast growing species and has drastically reduced exports in order to supply the growing domestic market.

## Section 3 - Power

At the end of 1974, Nigeria's total power output was rated at 690 MW; however, actual maximum operational capacity was only about 519 MW and rated firm capacity was as low as 358 MW. Improper maintenance of existing thermal stations throughout the country has contributed to frequent power shortages. An additional 200 MW (hydro) and 200 MW (thermal) will be added by the end of 1975. By 1980, total capacity is estimated to rise to 1740 MW to meet anticipated demands of 1336 MW with a 404 MW reserve which should be adequate to protect against any co-incident failure of the country's largest hydro, steam or gas turbine units. In the meantime, Government has decreed that all new dam projects in the country are to be designed for hydro-electric power generation whenever practical. Steps are also being taken to establish an extensive training programme to provide specialized personnel to manage, operate and maintain new generating facilities as they come on line.

## Section 4 - Summary

It should be noted that time did not permit an in-depth study of Nigerian industry and the remarks in this chapter should be considered more or less general in nature. In view of the obvious need to expand and diversify exports and reduce dependency on imports, it is suggested that Government intensify efforts to increase the production capacity of local industry and provide further incentives to overcome the present export lethargy which is fostered by existing economic conditions.



## POTENTIAL AVIATION CONTRIBUTION

### Section 1 - Introduction

1.1 Civil Aviation and in particular the national carrier Nigeria Airways, has a significant role to play in realizing the objectives and strategy of the Nigerian Government as set out in the "Third National Development Plan 1975 - 1980".

The team's approach in reaching its recommendations, which are not set out in order of relative importance is to:

- a) increase the level of economic activity;
- b) promote Nigerian self reliance, which means gaining knowledge and experience by various means;
- c) promote international trade;
- d) lay wherever possible the basis for practical co-operation amongst African States and airlines, particularly those associated with ECOWAS;
- e) advance practical suggestions together with the means of realizing them.

For the full background to the recommendations it is helpful to refer to the appropriate detailed chapter of the report. The purpose of this chapter is to focus attention on specific issues which the Government may wish to pursue at an early date.

### Section 2 - Tourism

#### 2.1 Introduction

There seems every likelihood that Nigeria will become an attractive destination for a variety of tourists, provided that costs can be tailored to the needs of the various markets. In this connection the term tourist is intended to denote the person who pays for his own travel and vacation.

Accepting that in general the Government's initial emphasis may be upon the encouragement of domestic tourism, in part to make easier the development of international tourism, there is a need to prepare a long term policy in which the vital role of civil aviation will become apparent.



The State of Kano wants UNDP assistance in preparing a plan for both domestic and international tourism to Kano. Such a plan would involve:

- 1) an inventory of tourist attractions;
- 2) the development of tourist facilities (e.g. hotels, game park, local tours, handicrafts, and personnel development);
- 3) the various media and methods for promoting Kano State tourism.

Hotel training facilities exist but the accelerating rate of growth of the hotel industry has given rise to support for the establishment of a hotel and catering national school(s), concerned largely with craft and supervisory activities. Consideration must be given too to the training needs of the tourism industry in general.

#### Recommendation (1)

The Federal Government should consider sympathetically the desire of Kano State for UNDP assistance. This could be met by appropriate extension of the UNOTC project which is to be undertaken.

#### Action Proposed

Should the Federal Government support this approach, it should call upon the local UNDP Resident Representative for assistance from UNOTC in order to submit an appropriate project proposal.

#### Recommendation (2)

The Federal Government should investigate the requirement for and advantages of a national school(s) for hotel and catering supervisory and craft activities. A like organization might well be established to meet the needs of allied tourism activities.

#### Action Proposed

Should the Federal Government adopt this recommendation, it should arrange through the local Resident Representative for the UNOTC to undertake a pre-project review of the matter.



Section 3 - Agriculture3.1 Introduction

Nigeria is fortunate in having a wide band programme of agricultural development, which will be flexible enough to accommodate the production of horticultural produce for air export as well as meet domestic demands. It is also fortunate in having two international airports, later to be increased to five, since each of these airports might in due course become the nucleus of export oriented activity. For the time being however, the team's recommendations are restricted to the following which are related to existing facilities.

Recommendation (3)

The Federal Government should encourage the fishing industry to develop European export markets for shrimp.

Recommendation (4)

Should it so request, the Kano State Government should be provided technical assistance in producing and marketing exotic air export crops as a valuable diversification of horticulture.

Action Proposed

No UNDP assistance is envisaged at this stage in connection with Recommendation (3), although I.T.C. may if requested be very helpful in providing general data. Airlines could doubtless be of help in seeking overseas buyers and creating a market, and by developing suitable commodity rates (i.e., special low rates for the carriage of specific commodities).

In connection with Recommendation (4), the progress of the Kano schemes may make FAO assistance unnecessary - but should it be required, it would probably be mainly in the planning and marketing areas. Cost of one man for 6 months - \$US18,000.

Section 4 - Industry4.1 Introduction

Industry is not export oriented due to lack of incentives and pressures.

Recommendation (5)

The long term importance of developing industrial exports should be borne in mind, to raise domestic output and standards, earn foreign exchange and promote employment. In this connection, it may be helpful to revitalize the Export Council, with representation from the Federal Government, and industrial, commercial and financial interests.



Action Proposed

Should it wish to do so, the Government should contact the local UNDP Representative when it considers that the time is ripe to commence an export drive, with a view to inviting UNCTAD to assist in exploring the possibilities and make plain the cost/benefits of alternative courses of action.

Section 5 - Civil Aviation5.1 Long-Term Planning - Introduction

It would be of great value to Nigeria to develop a long term plan of Nigerian civil operations and logistics, taking into account both existing trends and the modifications that may be expected to arise from participation within ECOWAS. In this way, Nigeria may develop flexible policies to make its full contribution to regional activities.

Recommendation (6)

That the air transport development of Nigeria should correspond to the full range of opportunities available.

Action Proposed

If the Government wishes it may request the local UNDP Resident Representative to provide an ICAO expert to work in conjunction with all interested parties. Cost, 6 man/months = \$18,000.

5.2 Ministry of Civil Aviation - Introduction

The additional responsibilities of the newly created Ministry of Civil Aviation will create heavy burdens for the administrative staff. This staff might well benefit from more advanced managerial training and from business courses, especially if these activities were related to civil aviation.

Secondly, the constant need to up date and broaden the technical knowledge of the professional staff in recognition of the entirely new dimension of problems which they will be facing demands additional training and wider experience, to be provided mainly by refresher and exchange courses especially for senior personnel.

It should be stressed that the absence of modern managerial techniques in administration and decision making can lead to considerable delays and/or financial losses.

Recommendation (7)

The Government should consider the matter in conjunction with ICAO to determine which priorities should be accorded to the various forms of training and provision of experience envisaged in the above Introduction. This review would relate only to such areas as are not already covered by the Government Draft Project NIG/75/ /A/01/15 arising from the July 1975 Manpower and Training Requirements Survey.



Action Proposed

The Government should request ICAO through the local UNDP Resident Representative to provide a senior educational adviser on this subject.

One man for one month - cost \$3,000.

Action Proposed

If, as seems possible, the manpower situation is so critical that there is difficulty in releasing staff to equip them for their new duties, then the Government may wish to consider with ICAO the possibilities of obtaining the services for an appropriate period of a competent consultant in managerial organization and/or the assignment of OPAS experts to make the basis staff releases possible.

Recommendation (8)

There should be a review of the methods of collecting, assembling and distributing civil aviation data. A central statistical services unit within the Ministry not necessarily headed by a statistician, but able to anticipate and provide both routine and exceptional data requirements, is an essential element in providing a sound basis for policies.

It should be important to ensure that one government authority alone deals with this data. This course might prove to be a considerable economy in itself.

The head of such a unit should understand airline as well as government statistical requirements.

Action Proposed

Should the government wish, ICAO could undertake such training - one man for 9 months = \$27,000.

### 5.3 Nigeria Airways - Introduction

The existing strain upon Nigerian Airways management and resources was recognized by the In-Depth Study of 1973. Fleet expansion, review of international operating policy and aircraft equipment changes together with the likely increase in domestic night flying will all add to the pressure upon the organization.

Recommendation (9)

The Government should take an early decision on whether or not an outside management contract should be let, and whether or not ICAO should be invited to provide selected assistance.

In any event the alternatives might usefully be discussed with ICAO's Technical Assistance Bureau which would be able to provide disinterested advice from a very wide bank of experience.



Recommendation (10)

The respective roles of the Board and management should be clearly defined, and management represented on the Board.

Recommendation (11)

A finance manager should be appointed, to be responsible for all aspects of financial control, and most management information systems.

Recommendation (12)

Managers' areas of authority should be clearly delineated.



SPECIAL MATTERSSection 1 - Civil Aviation in Nigeria1.1 Introduction

Recognizing the growing demand for aviation facilities, the Government plans capital expenditures of N528 million between 1975/76 and 1979/80 on the following projects:

(i) Airport Development

(N395m)

All twelve of the airports currently used by scheduled services will be developed or re-sited. Additional airport construction will enable the twelve state capitals, plus four commercial centres to be served. Lagos (Ikeja) and Kano will be able to accept B747, and Ilorin will be built to act inter-alia as the weather alternate to Ikeja. These three airports plus Port Harcourt and Maiduguri will be classified as international. All other airports will be able to accept B-737 as a minimum.

Fourteen airstrips will be rehabilitated.

(ii) Navigational aids, communications and national radar cover, etc. (N82m)(iii) Provision of new aircraft, hangers at Lagos and Kano, other accommodation, all for Nigeria Airways.

(N51m)

Sources: Third National Development Plan 1975-80: Lagos Airport Prepares for the Year 2000; Airport Programme Nigeria, Progress Report, May - June 1975.

1.2 Administration of Civil Aviation

1.2.1. In April 1975, the Civil Aviation Division was detached from the Ministry of Transport, and given the status of a Ministry. In due course, it is intended to create a separate Airports Authority, which might be charged with all traffic handling. The Airports Authority will be responsible to the Ministry of Civil Aviation.

1.2.2 Nigeria Airways, the national carrier, is very closely supervised by the Ministry. The Board Chairman, Mr. Francis Obi was appointed when he was Deputy Permanent Secretary concerned with civil aviation in the Ministry of Transport, and the Directors were representatives of the Nigeria Air Force, and of the three Ministries of Economic Development, Transport and Finance. Alhaji Ibrahim Halilu, as a senior government pensioner, was an independent member of the Board.

Mr. Obi retired from the post of Permanent Secretary of the Ministry of Civil Aviation early in September, and has not been replaced at the time of writing (21.9.75). It was announced in mid-September that Alhaji Ibrahim Halilu had been appointed Chairman of Nigeria Airways in replacement of Mr. Francis Obi.



1.2.3 In view of all the additional pressures and responsibilities created by the enormous intended expansion of civil aviation facilities it may be advisable to consider upgrading the training and experience of administrators by suitable fellowships including perhaps attendance at business schools. In like fashion, the senior technical staff might benefit from preparation for the new demands which the expansion programme will make upon them.

### 1.3 Civil Aviation Operations

1.3.1. The hub of Nigerian civil aviation is Lagos, from whence 21 international carriers operate 87 scheduled flights weekly with aircraft ranging up to DC-10. The main traffic route is to/from Europe, where most carriers want the freedom to increase frequency or the size of their equipment. The second traffic route is along the West Coast. There is relatively little demand for capacity to the South, East and North East.

Regrettably there is relatively little outbound cargo - personal effects, machinery for repair, tropical fish, kola nuts, etc. There is a significant import of textiles from along the West Coast.

1.3.2 There are 96 scheduled domestic flights from Lagos weekly, operated by Air Nigeria's B737's, F28's and F27's. These flights form an elaborate pattern with main interchange points at Kaduna and Kano.

1.3.3 There are some 40 international cargo charters to Lagos weekly - mainly from Europe.

1.3.4 Kano, the second international airport of Nigeria, not only has some 15 Northbound scheduled international services weekly (plus Southbound) but also a substantial volume of domestic operations. And of course, it caters to the greater part of the Nigerian Hajj traffic.

1.3.5 Outbound deadload from Kano is relatively light but it includes hides and skins.

1.3.6 There are about 20 international cargo charters to Kano weekly - again mainly from Europe.

1.3.7. There are approximately 70 charter aircraft in Nigeria ranging from helicopters to a DC-6, most of which are based at Lagos. These aircraft are concerned with the transport of executives and valuables throughout the country but the bulk of activity is ferrying between Lagos and private strips and rigs at the oilfields.

1.3.6 There is a regrettable lack of readily available data within Nigeria on commercial operations. This may be due to the facts of the sheer volume of activity, the multiplicity of data collecting bodies and the lack of a central collating and disseminating agency.

(Sources: Civil Aircraft Registered in Nigeria, April 1975, Nigeria Airways Scheduled Aircraft Movement, Lagos, August 1975).



#### 1.4 Congestion at Lagos Airport

1.4.1. Ikeja is some 20 km from Lagos, yet the trip to/from the airport is typically 2 hours, and will probably not diminish until the relief road now under construction is fully available, probably within two years.

The international and domestic termini, both of which have small aprons, are separated by Nigeria Airways engineering base.

1.4.2 Nigeria Airways is responsible for traffic handling, but international operators have found it worthwhile to bring in their own ground equipment and to do as much of their own handling as possible. Most international traffic is on business, and is experienced in delays of baggage handling and the necessarily prolonged formalities at Health, Immigration, Customs and Exchange Control. These agencies tend to operate somewhat independently of the Airport Commandant. The latter has a counterpart Military Airport Commandant responsible for the wide area of matters affecting security. Naturally, facilitation difficulties do occur and can often be overcome in the usual ways, but the traveller who arrives without a valid visa stands a high probability of being refused admittance.

1.4.3 The cargo area, near the maintenance hangers, has poor access, and gives the appearance of a dump on which the latest arrivals are piled. It is advisable for consignees to make every effort to rescue cargo from the "shed" as soon as possible. Two new sheds adjacent to the present area are to be opened shortly and the Inspector of Customs insists that the movement of cargo will be expedited.

1.4.4 The charter operators automatically receive permission to operate provided they give 5 days advanced notice in order to receive official approval and to prepay Customs duties. So far as possible they segregate their aircraft from the normal scheduled operators, bringing their own or agents' transport to unload their cargo and remove it from the airport without delay. They make every effort to minimize turn round times. Since the July 29 change in government, there have been restrictions on unloading at night. The authorities constructed balloon cargo storage areas, but do not allow their use. As seaport congestion is eased, and perhaps reduced to acceptable levels within two years, the demand for cargo charters will diminish but may well continue at a substantial level.

1.4.5 The domestic terminal has too few reporting positions, incoming and outgoing passengers are not segregated, and as at the international terminal, the area is cluttered with tiresome unofficial helpers known as touts.

1.4.6 The domestic charter operators load and unload outside their own hangers.

1.4.7 The airport has coped with the developing situation by a succession of expedients, and it needs constant attention to prevent seizing up.



It is suggested that, quite apart from the radical measures that will be taken in due course, it would be as well to provide more public notices of interest to the traveller (where to report, advice of delays, suggested fares to town, lists of hotels etc.) to reduce the work of staff and the frustrations of passengers.

#### 1.5 Nigeria Airways

1.5.1 The intention of the Government is that Nigeria Airways should open up the entire country to civil aviation. In this connection, consideration is being given not only to the major airports but to STOL and/or F27 Freighter operations. Local charter companies will continue to be supervised but there is no intention of putting them out of business.

1.5.2 The company's international services will be required to be viable, but it is intended that it should achieve its fair share of the market to Zurich, Brussels, Frankfurt and Madrid as well as continuing to serve London, Amsterdam and Rome. The second priority in international routes will be the further development of regional services i.e. additional West Coast services and to Kinshasa. Little emphasis is placed as yet upon East Africa and the Middle East.

1.5.3 The Government has not accepted the IATA increases of fares and rates from March 1974 for ex-Nigeria traffic. Domestic air fares will be reviewed as the airport reconstruction plan is completed.

1.5.4 The Third National Development Plan 1975-80 states that the Airways's recent expansion in aircraft has not been matched by its managerial and professional competence, and that until this is remedied the company cannot hope to grow in international competition. In the context of observations on poor management and control it also states that the examination of the In-depth Study on Nigeria Airways submitted in 1973 is continuing. This Study is taken to be that of TWA, which reputedly offered a major management contract together with a training programme. The deep concern of the Government with Nigeria Airways can be gauged from the above.

1.5.5 The public image of Nigeria Airways is not good. Its passenger handling, inability to meet its handling agreements at Ikeja, poor commissary arrangements and its propensity to cancel services without warning are all negative features.

Company morale is generally low. No manager sits on the Board, although it would appear that the Board takes a very active interest in day to day affairs. Most managerial posts are 'acting' or unfilled. Responsibility is insufficiently delegated, partially perhaps because those able to accept it consider it imprudent to do so.

There is no corporate plan nor true system of budgeting and financial reporting. The airline believes that it is still suffering financial losses. It is not necessarily a criticism of the commercial department to observe that it appears to be lamentably under-organized and under-staffed at the managerial level. There has been a rapid turnover of Chief Accountants, and outside assistance has been obtained to start catching up with accounting arrears; 1973/74 accounts are now being prepared. The Company's ground training cannot meet the company's requirements due to lack of adequate facilities.

The computer is understood to be very limited in its scope. The airline has 4,000 employees.



It is not necessary to continue this catalogue of well-known difficulties - suffice it to add that management needs strengthening at top and middle levels and that the company appears to be astonishingly short of working capital. It cannot afford to provide adequate ground handling equipment at Ikeja.

1.5.6 Its fleet and operations may be summarized as follows:

| <u>A i r c r a f t</u> |       | <u>R o u t e s</u>  | <u>Revenue</u> | <u>hours</u>        |    |
|------------------------|-------|---------------------|----------------|---------------------|----|
| Types                  | Fleet |                     | Fleet Annual   | Each Aircraft Daily |    |
| B707                   | 2     | Daily to London     | 5346           | 7.3                 |    |
| B737                   | 2     | W. Coast & Internal | 3713           | 5.1                 | a. |
| F 28                   | 4     | W. Coast & Internal | 8343           | 5.7                 | a. |
| F 27                   | 3     | Internal            | 6094           | 5.6                 | b. |
|                        |       |                     | <u>23,496</u>  |                     |    |

a. Bulk of operations are day only.

b. All operations are day only. Fleet includes one aircraft 'based' at Kano, and excludes another parked at Kano.

Rescheduling of international operations, and the installation of night landing facilities at domestic points in addition to Lagos and Kano, will permit the improvement of these moderate aircraft utilizations when required.

On European and Middle East services, Nigeria Airways has commercial agreements with other carriers. To and from Europe its own seat factor improve from 32% in 1973 to 43% in 1974, the volume of passenger miles increasing by 16% to 137m.

On the W. Coast run there are no commercial agreements, and between 1973 and 1974 the seat factor increased from 39% to 40% whilst the passenger miles decreased by 2% to 21m.

On domestic services, the seat factor improved from 55% to 58%, whilst the passenger miles decreased by 38% to 101m.

Current figures are not available, but the impression of the travel trade in general is that this year is showing a growth of some 20%.



1.5.7. The Development Programme implies that an undue number of expatriate pilots is employed - it is understood that the number is now about 34% of a total near 100. The Ministry is aware that the company hopes to operate a fleet of the following order by the end of the Development Programme, using virtually no expatriate pilots.

2 wide bodied aircraft

4 B707

4 B737

7 F28

2 F27 Freighters

This broad fleet commitment makes no allowance for tourist traffic.

1.5.8 Neither the Government nor the Airways are prejudiced against expatriates in any way, they merely wish to ensure that the most effective return is achieved when labour costs are incurred.

1.5.9 Nigeria Airways now undertakes the maintenance and overhaul of all its aircraft except that of the B707's which is sub-contracted to BOAC. As the staff's relative inexperience is made good, the improvement of utilization will become easier. Overhaul of major components and engines is undertaken overseas. Fourteen expatriate engineers are employed.

#### 1.6 The Possibilities

1.6.1 Nigerian Airways has a route and rate structure, the exploitation of which would appear to offer the opportunity of becoming a powerful and prosperous airline.

The foregoing paragraphs will have tended to the conclusion that Nigeria Airways needs substantial experienced managerial assistance to achieve this end. If this conclusion is accepted then there appears to be three main possibilities available viz:

- (1) a large scale management contract, if another airline is now in a position to undertake such a project.
- (2) a small scale management project, possibly by another African airline.
- (3) ICAO assistance in selected areas.



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List of Abbreviations:

|         |   |   |
|---------|---|---|
| FMCA    | - | Federal Ministry of Civil Aviation                          |
| FMEDR   | - | Federal Ministry of Economic Development and Reconstruction |
| FMTrade | - | Federal Ministry of Trade                                   |
| FMT     | - | Federal Ministry of Transport                               |
| FOS     | - | Federal Office of Statistics                                |

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| Mr. P. Gennery             | Overseas Traffic Coordinator, Panalpina World Transport (Nigeria) Ltd.                       |
| Mr. J. E. Jegede           | Executive Secretary, Manufacturers Association of Nigeria                                    |
| Mr. H. S. Jones            | Managing Director, IBM Nigeria Ltd.  |
| Mr. D. Loesken             | Manager Operations, The First National Bank of Chicago (Nigeria), Ltd.                       |
| Lt. Col. J. A. Makan-juola | International Tourist Organization   |
| G/C P. R. Magrath          | West Africa Committee  |
| Mr. E. K. W. Mensah        | Area Manager, Messrs. Herwa Ltd./Mesurado Fishing Co. Nigeria                                |
| Mr. T. O. Odusanya         | Economist I, Central Bank of Nigeria   |
| Mr. A. Oke                 | Asst. Secretary, The Lagos Chamber of Commerce and Industry                                  |
| Dr. W. Roeske              | Robert R. Nathan Consultants   |
| Mr. A. W. Schmidhauser     | General Manager, The First National City Bank of New York (Nigeria) Ltd.                     |
| Mr. A. Soyode              | Chairman, Eko-Nippon Fishing Co., Ltd.   |
| Mr. S. Watson              | Marketing Director, Standard Bank of Nigeria, Ltd.   |
| Mr. I. Yakubu              | Public Relations Advisor, United African Corp. of Nigeria, Ltd.                              |
| Mr. Z. Yamada              | General Manager, Osadjere Fishing Co., Ltd. (IBRU)   |



TRAVEL

|                      |  |
|----------------------|--|
| Mr. I. K. Ajimotokin | Area Manager, Alrairie Air Service               |
| Mr. O. A. Akinrinade | Group Operations Manager, Nigeria Hotels         |
| Mr. I. A. Atigbi     | Secretary General, Nigerian Tourist Association  |
| Mr. P. A. Bajomo     | Deputy General Manager, Airport Hotel, Ikeja     |
| Mr. J. L. Bingley    | School Principal, Nigeria Hotels, Ltd.           |
| Mr. M. C. da Silva   | P.R.O. Nigerian Tourist Association              |
| Capt. de Blome       | Aero Contractors                                 |
| Mr. A. Ejoh          | African Travel Commission                        |
| Mr. R. A. Ibraheem   | General Manager, Federal Palace Hotel            |
| Mr. K. O. Meleki     | Manager Travel Bureau (Lagos), Transcap          |
| Mr. M. A. Moor       | Manager, Pan African Transport                   |
| Mr. J. O. Nwosu      | General Manager, Scantravel Ltd.                 |
| Mr. A. G. Violaris   | General Manager, Mainland Hotel (Leventis Group) |
| Capt. Vlaming        | Aero Contractors                                 |

OTHER

|                    |  |
|--------------------|--|
| Mr. L. E. Moe      | Agricultural Attache, American Embassy                                 |
| Dr. F. R. Moermann | Pedologist, International Institute of Tropical<br>Agriculture, Ibadan |
| Mr. C. N. Mwangemi | Second Secretary, Kenya High Commission                                |
| Mr. G. Olaosegba   | Marketing Expert, National Fruits & Vegetables<br>Research, Ibadan     |
| Mr. R. O. Olson    | Food and Agricultural Officer, USAID                                   |



SECTION IVALUE OF ANNUAL IMPORTS AND EXPORTS

(in millions of Naira)

|                                    | <u>1970</u>  | <u>1971</u>    | <u>1972</u>  | <u>1973</u>    | <u>1974</u>    |
|------------------------------------|--------------|----------------|--------------|----------------|----------------|
| Total Domestic Export (f.o.b.)     | 877.0        | 1,280.8        | 1,421.8      | 2,268.4        | 5,783.4        |
| Total Re-exports (f.o.b.)          | 8.4          | 12.5           | 12.4         | 9.0            | 11.0           |
| Total Imports (c.i.f.)             | <u>756.4</u> | <u>1,078.9</u> | <u>990.1</u> | <u>1,224.8</u> | <u>1,737.3</u> |
| Trade Balance                      | 129.0        | 214.4          | 444.1        | 1,052.6        | 4,057.1        |
| Petroleum Exports (a)              | 510.0        | 953.8          | 1,180.0      | 1,901.2        | 5,373.8        |
| Imports Traceable to Oil Companies | <u>81.0</u>  | <u>104.8</u>   | <u>61.6</u>  | <u>77.2</u>    | <u>170.0</u>   |
| Trade Balance - Petroleum          | 429.0        | 849.0          | 1,118.4      | 1,824.0        | 5,203.8        |

(a) - includes refined oil as well as crude

SECTION IINIGERIA'S MAJOR EXPORTS IN 1974\*

| <u>S.I.T.C.</u><br><u>Description</u> | <u>Quantity</u><br><u>(b)</u> | <u>Value</u><br><u>(000 Naira)</u> | <u>Unit Value</u><br><u>Per Ton</u> |
|---------------------------------------|-------------------------------|------------------------------------|-------------------------------------|
| Cocoa                                 | 197                           | £N 158,970                         | £N 806.95                           |
| Groundnuts                            | 30                            | 6,828                              | 227.60                              |
| Crude Petroleum                       | 92,316                        | 5,287,030                          | 57.27                               |
| Palm Kernels                          | 185                           | 43,722                             | 236.34                              |
| Rubber                                | 62                            | 37,525                             | 605.24                              |
| Tin Metal                             | 5,681 (c)                     | 26,123                             | 4,598.3                             |
| Columbite                             | 2,277 (c)                     | 1,375                              | 603.86                              |
| Timber, logs & sawn                   | 899 (d)                       | 11,185                             | 12.44 (e)                           |

Notes: \* Accounts for over 97% of total domestic export value.

(b) thousands of tons except as noted

(c) tons

(d) thousands of cubic meters

(e) per cubic meter

Source: "Review of External Trade Nigeria 1974" and "Economic Indicators", Federal Office of Statistics, Lagos, Nigeria.



NIGERIA'S 1974 TRADE WITH O.A.U. COUNTRIES

(in Naira)

| <u>Country</u>           | <u>Imports From</u> | <u>Exports To</u> | <u>Balance + or (-)</u> |
|--------------------------|---------------------|-------------------|-------------------------|
| Morocco                  | 2,586,661           | 10,150            | (2,576,511 )            |
| Algeria                  | 433,172             | 15,791            | ( 417,381 )             |
| Tunisia                  | 7,055               | 27,924            | 20,869                  |
| Egypt                    | 1,527,238           | 561,444           | ( 965,794 )             |
| Sudan                    | 65,698              | -                 | ( 65,698 )              |
| Senegal                  | 422,190             | 18,330,498        | 17,908,308              |
| Ivory Coast              | 1,013,314           | 30,480,381        | 29,467,067              |
| Dahomey                  | 1,411,239           | 413,731           | ( 997,508 )             |
| Niger                    | 20,051              | 2,546,569         | 2,526,518               |
| Gambia & St Helena       | 8,778               | 6,266             | ( 2,512 )               |
| Guinea                   | 8,899               | 2,570             | ( 6,329 )               |
| Sierra Leone             | 205,984             | 10,441,994        | 10,236,010              |
| Liberia                  | 261,428             | 184,022           | ( 77,406 )              |
| Ghana                    | 531,924             | 35,186,423        | 34,654,499              |
| Togo                     | 128,339             | 23,484            | ( 104,855 )             |
| Cameroun Republic        | 726,096             | 304,831           | ( 421,265 )             |
| Equatorial Customs Union | 1,834,044           | 6,579,780         | 4,745,736               |
| Zaire                    | 3,536,575           | 842,128           | (2,694,447 )            |
| Malawi                   | 5                   | 190               | 185                     |
| Zambia                   | 1,373               | 9,932             | 8,559                   |
| Tanzania                 | 18,377              | 2,880             | ( 15,497 )              |
| Uganda                   | 4,708               | 20                | ( 4,688 )               |
| Kenya                    | 314,149             | 1,878             | ( 312,271 )             |
| Ethiopia                 | 4,403               | 90                | ( 4,313 )               |
| Other                    | <u>5,011,895</u>    | <u>205,021</u>    | <u>(4,806,874 )</u>     |
| Total O.A.U.             | 20,083,595          | 106,177,997       | 86,094,402              |
| Total All Countries      | 1,737,300,000       | 5,794,400,000     | 4,057,100,000           |
| Percent O.A.U.           | 1.2%                | 1.8%              | 2.1%                    |

Note: 1 Naira = US\$1.62Source: "Review of External Trade - Nigeria 1974", Federal Office of Statistics, Lagos, Nigeria.



FEDERAL GOVERNMENT REVENUES - 1974

(in millions of Naira)

| <u>Type and Source</u>          | <u>Amount</u> | <u>Percent</u> |
|---------------------------------|---------------|----------------|
| <u>Direct Taxes</u>             |               |                |
| Company tax                     | 146.6         | 3.2%           |
| Personal income tax             | 11.1          | 0.3            |
| Petroleum profits tax           | 2,872.5       | 63.3           |
| Other tax revenue (a)           | 1.9           | Neg            |
| <u>Indirect Taxes</u>           |               |                |
| Import duties                   | 328.3         | 7.3            |
| Export duties                   | 5.5           | 0.1            |
| Excise duties                   | 164.4         | 3.6            |
| Interest and repayments         | 127.1         | 2.8            |
| Mining (royalties, rents, fees) | 854.2         | 18.8           |
| Miscellaneous                   | 25.4          | 0.6            |
| Total                           | 4,537.0       | 100.0          |

(a) Includes capital gain, casino and airport taxes.

Source: Central Bank of Nigeria, Annual Report and Statement of Accounts for Year ended 31 December, 1974.



FEDERAL GOVERNMENT EXPENDITURES - 1974

(in million of Naira)

| <u>Function</u>                              | <u>Amount</u>  | <u>Percent</u> |
|--|----------------|----------------|
| General administration and internal security | 555.4          | 20.5%          |
| <u>Economic Services</u>                     |                |                |
| Agriculture                                  | 24.6           | 1.0            |
| Construction                                 | 30.8           | 1.0            |
| Transport and communications                 | 9.9            | .4             |
| Other  | 9.1            | .3             |
| <u>Social and Community Services</u>         |                |                |
| Education                                    | 62.5           | 2.3            |
| Health                                       | 29.1           | 1.1            |
| Other  | 3.3            | .1             |
| <u>Transfers</u>                             |                |                |
| Public debt servicing                        |                |                |
| Internal                                     | 104.4          | 3.9            |
| External                                     | 29.1           | 1.1            |
| Appropriations to States                     | 643.5          | 23.7           |
| Pensions and gratuities                      | 15.4           | .6             |
| To Develop Fund                              | <u>1,193.8</u> | <u>44.0</u>    |
| <b>Total</b>                                 | <b>2,710.9</b> | <b>100.0</b>   |

Source: Central Bank of Nigeria, Annual Report and Statement of Accounts for Year ended 31 December, 1974.



SUMMARY OF FEDERAL GOVERNMENT FISCAL OPERATIONS - 1974

(in million of Naira)

Fiscal position at year end

|                           |         |       |
|---------------------------|---------|-------|
| Consolidated Revenue Fund | 954.6   |       |
| Contingencies Fund        | 2.0     |       |
| Development Fund          | (228.6) |       |
| Total                     |         | 728.0 |

Plus

|                 |         |         |
|-----------------|---------|---------|
| Current revenue | 4,537.0 |         |
| Internal loans  | 132.7   |         |
| External loans  | 54.6    |         |
| Total           |         | 4,724.3 |

Less

|                        |         |           |
|------------------------|---------|-----------|
| Recurrent expenditures | 1,517.1 |           |
| Capital expenditures   | 1,549.4 |           |
| Total                  |         | (3,066.5) |

|   |  |         |
|---|--|---------|
| <u>Fiscal position at end of period</u> |  | 2,385.8 |
|---|--|---------|

Source: Central Bank of Nigeria, Annual Report and Statement of Accounts for year ended 31 December, 1974.



FEDERAL AND STATE CAPITAL EXPENDITURES ON TOURIST FACILITIES

THIRD NATIONAL DEVELOPMENT PLAN 1975-1980

|  | Rooms | Capital<br>Cost £N M | Timing              |
|--|-------|----------------------|---------------------|
| <u>FEDERAL</u>   |       |                      |                     |
| National Tourist Authority:                            |       |                      |                     |
| One holiday village in each state                      | > 200 | 14.6                 | Mainly early years. |
| National travel bureau and inspectorate offices        |       | 4.7                  | " " "               |
| Research feasibility studies, plus H.Q. etc            |       | 7.4                  | " " "               |
| Fund for loans to hotels, entertainment centres, etc   |       | 15.0                 | " " "               |
| Phase II of Federal Palace Hotel - with nightclubs etc | 380*  | 60.0                 | 1975/78             |
| Nigeria Hotels:  |       |                      |                     |
| 1) buying out C.D.E. interest                          |       | 20.0                 | 1975/78             |
| 2) expansion and improvement of                        |       |                      |                     |
| Central Hotel, Kano 7                                  | *     |                      |                     |
| Ikoyi, Lagos 8   | *     |                      |                     |
| Beach 7  | *     | 22.0                 |                     |
|  |       | <u>143.7</u>         |                     |
| <u>STATES</u>  |       |                      |                     |
| Benue-Plateau  |       |                      |                     |
| International Hotel                                    | *     | 6.0                  | 1975/77             |
| Catering Rest Houses - 5 new                           |       | 1.6                  | 1975/78             |
| " " " - 6 expanded                                     |       | 1.6                  | 1976/80             |
| Camping Sites, tourist villages, etc                   |       | 0.7                  | 1975/80             |
|  |       | <u>9.9</u>           |                     |

\* Claimed or probable international standard. Some listed projects may be of international standard but not indicated as such.



|   | Rooms | Capital<br>Cost £N M | Timing         |
|---|-------|----------------------|----------------|
| <b>East Central</b>   |       |                      |                |
| Development at Hotel Presidential, and<br>3 new hotels                            |       | 10.0                 | Declining rate |
| Catering Rest Houses - rehabilitation<br>- 5 Phase I develop-<br>ments            |       | 1.0                  | 1975/78        |
| Hotels Training (Staff) School  |       | 0.5                  | 1975/78        |
| Tourist centres   |       | <u>2.5</u>           | 1975/79        |
|   |       | <u>14.0</u>          |                |
| <b>Kano</b>   |       |                      |                |
| Extension to Kano State Hotel   | *     | 1.5                  | 1975/77        |
| Preservation of Historic Sites  |       | 1.0                  | Constant rate  |
| Catering Rest Houses - 5 additional   |       | 0.6                  | 1975/80        |
| Conference and Convention Hall - i.e.,<br>final phase of Bagauda Lake Hotel       | *     | 0.7                  | 1975/76        |
| Cultural Museum Complex   |       | <u>2.6</u>           | 1975/80        |
|   |       | <u>6.4</u>           |                |
| <b>Kwara</b>  |       |                      |                |
| Expansion of Kwara Hotel at Ilorin, plus<br>two new hotels at Lokoja and New Busa |       | 8.0                  | 1976/79        |
| Catering Rest Houses - 8 additional   |       | 0.8                  | 1975/80        |
| Improvement of 3 tourist sites  |       | 0.25                 | 1975/78        |
| Touristic surveys   |       | 0.1                  | 1975/79        |
| New Borgu Game Reserve Motel, tourist<br>village, camps                           |       | <u>2.5</u>           | 1976/77 mainly |
|   |       | <u>11.7</u>          |                |
| <b>Lagos</b>  |       |                      |                |
| 4 International Hotels  | *     | 2.0                  | Constant rate  |
| Recreational facilities including 4<br>small chalet centres                       |       | <u>4.0</u>           | 1975/78 mainly |
|   |       | <u>6.0</u>           |                |

\* Claimed or probable international standard. Some listed projects may be of international standard but not indicated as such.



|  | Rooms        | Capital<br>Cost £N M | Timing  |
|--|--------------|----------------------|---------|
| <b>Mid Western</b>   |              |                      |         |
| Expansion of Bendel hotel facilities   |              | 0.9                  | 1975/77 |
| Mid-West Hotels expanded   |              | <u>0.5</u>           | 1975/78 |
|  |              | <u>1.4</u>           |         |
| <b>North Central</b>   |              |                      |         |
| New hotel at Zaria   |              | 3.0                  | 1975/77 |
| 4 Catering Rest Houses - 1 in each<br>division   |              | 3.0                  | 1975/79 |
| Camp Sites - 2   |              | <u>0.1</u>           | 1975/77 |
|  |              | <u>6.1</u>           |         |
| <b>North Eastern</b>   |              |                      |         |
| Catering Rest Homes converted to modern<br>hotels at Maiduguri, Yankari and<br>Gombe. Additionally an annex at<br>Lake Alau with 20 beds, golf course,<br>artificial beaches | 320*<br>beds | 10.0                 | 1975/79 |
| Tourist Centres and buses  |              | 0.8                  | 1975/77 |
| Yankari Game Reserve - dining hall,<br>conference room, etc  |              | <u>0.8</u>           | 1975/77 |
|  |              | <u>11.6</u>          |         |
| <b>North Western</b>   |              |                      |         |
| Sokoto Hotel   |              | 4.0                  | 1975/78 |
| Tourism Development  |              | 0.25                 | 1975/78 |
| Argungu festival village - improvement   |              | 0.35                 | 1975/78 |
| Sokoto Catering Rest House rehabilitation  |              | 0.23                 | 1975/78 |
| Catering Rest Houses - repair of some  |              | 0.3                  | 1975/78 |
| " " " - 5 new  |              | <u>1.0</u>           | 1975/78 |
|  |              | <u>6.1</u>           |         |

\* Claimed or probable international standard. Some listed projects may be of international standard but not indicated as such.



|  | Rooms | Capital<br>Cost EN M | Timing        |
|--|-------|----------------------|---------------|
| <b>Rivers</b>  |       |                      |               |
| Tourist and Hotel Corporation Projects,<br>Extension of Hotel Presidential | 200   | 20.0                 | 1975/78       |
| Isaka Holiday Resort - 260 chalets,<br>night club, etc                     | 260   |                      |               |
| Eagle Island - ultra modern complex  | 500*  |                      |               |
| Catering Rest House - 1 in each of the<br>14 divisions                     |       | 3.0                  | 1975/77       |
| Hotel with office accommodation  |       | <u>1.4</u>           | 1975/77       |
|  |       | <u>24.4</u>          |               |
| <b>South Eastern State</b>   |       |                      |               |
| Hotel at Calabar   | *     | <u>5.0</u>           | 1977/80       |
| <b>Western State</b>   |       |                      |               |
| Tourist Centres - construction and<br>improvements                         |       | 1.15                 | constant rate |
| 2 modern hotels  |       | <u>6.0</u>           | " "           |
|  |       | <u>7.2</u>           |               |
| <b>Summary of Quoted Expenditures</b>                                      |       |                      |               |
| Federal  |       | 143.7                |               |
| State  |       | <u>109.8</u>         |               |
|  |       | <u>253.5</u>         |               |

\* Claimed or probable international standard. Some listed projects may be of international standards but not indicated as such.