NIGERIA'S CASSAVA VALUE CHAIN

Production Leadership, Export Performance and the Value-Chain Gap

Is Nigeria converting its cassava production advantage into productivity, processed exports and industrial value?

WORLD OUTPUT SHARE	2024 YIELD	EXPORT VALUE
18.3%	5.84 t/ha	$2.35m

Nigeria is a production leader, but the next breakthrough is higher yield, deeper processing and stronger export value capture.

Source: FAOSTAT; author's calculations and analysis

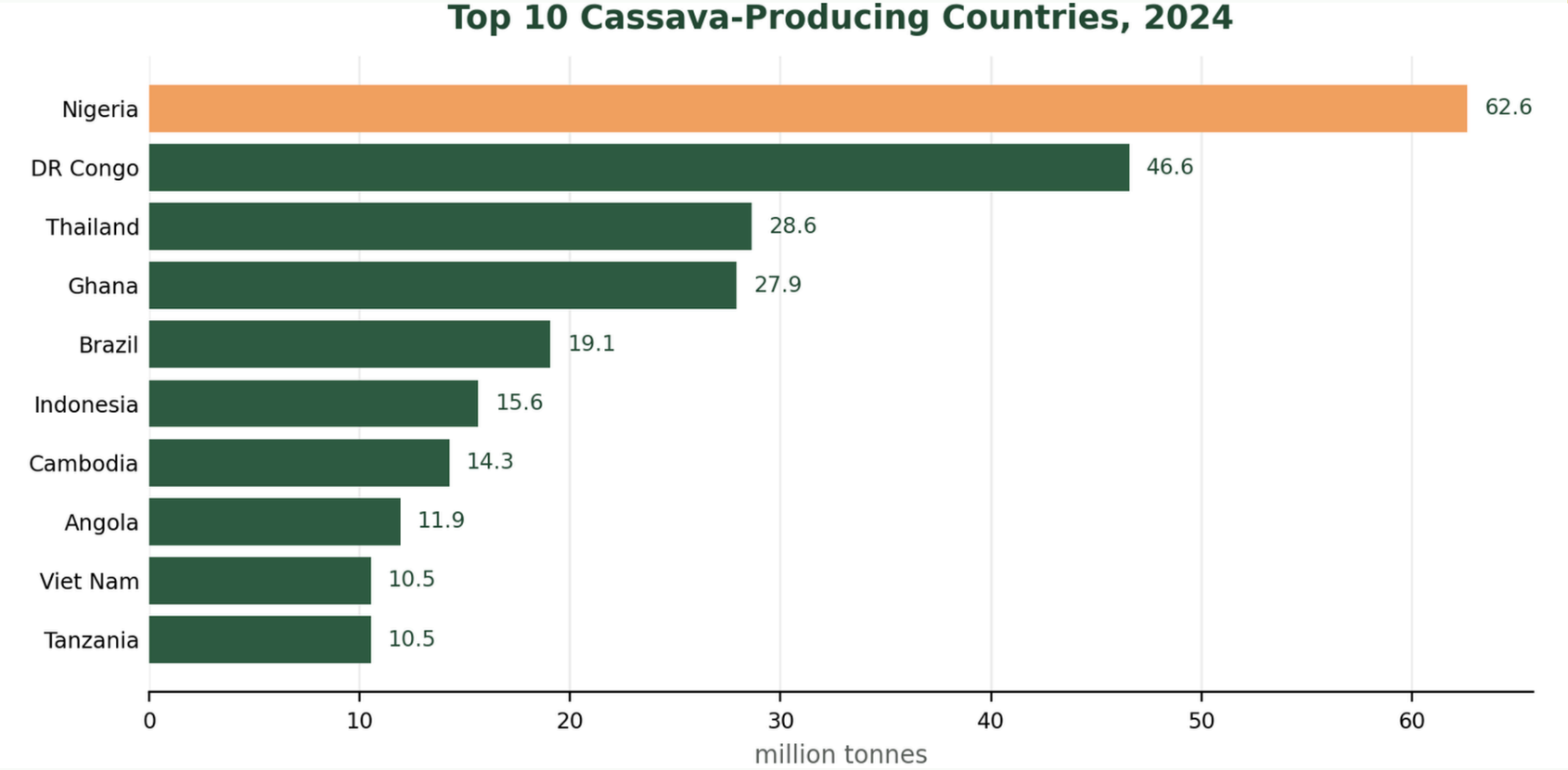
Data sourcing, Analysis, charts, and slides prepared: Uchechukwu Eze

Nigeria leads global cassava production, accounting for 18.3% of world output

Nigeria produced 62.6 million tonnes in 2024 - more than twice Thailand's output and over one-quarter of African production.

GLOBAL RANK	WORLD OUTPUT SHARE	AFRICAN OUTPUT SHARE
#1	18.3%	28.1%

Nigeria's production leadership is clear, but scale alone does not prove productivity, processing capacity or export-value capture.



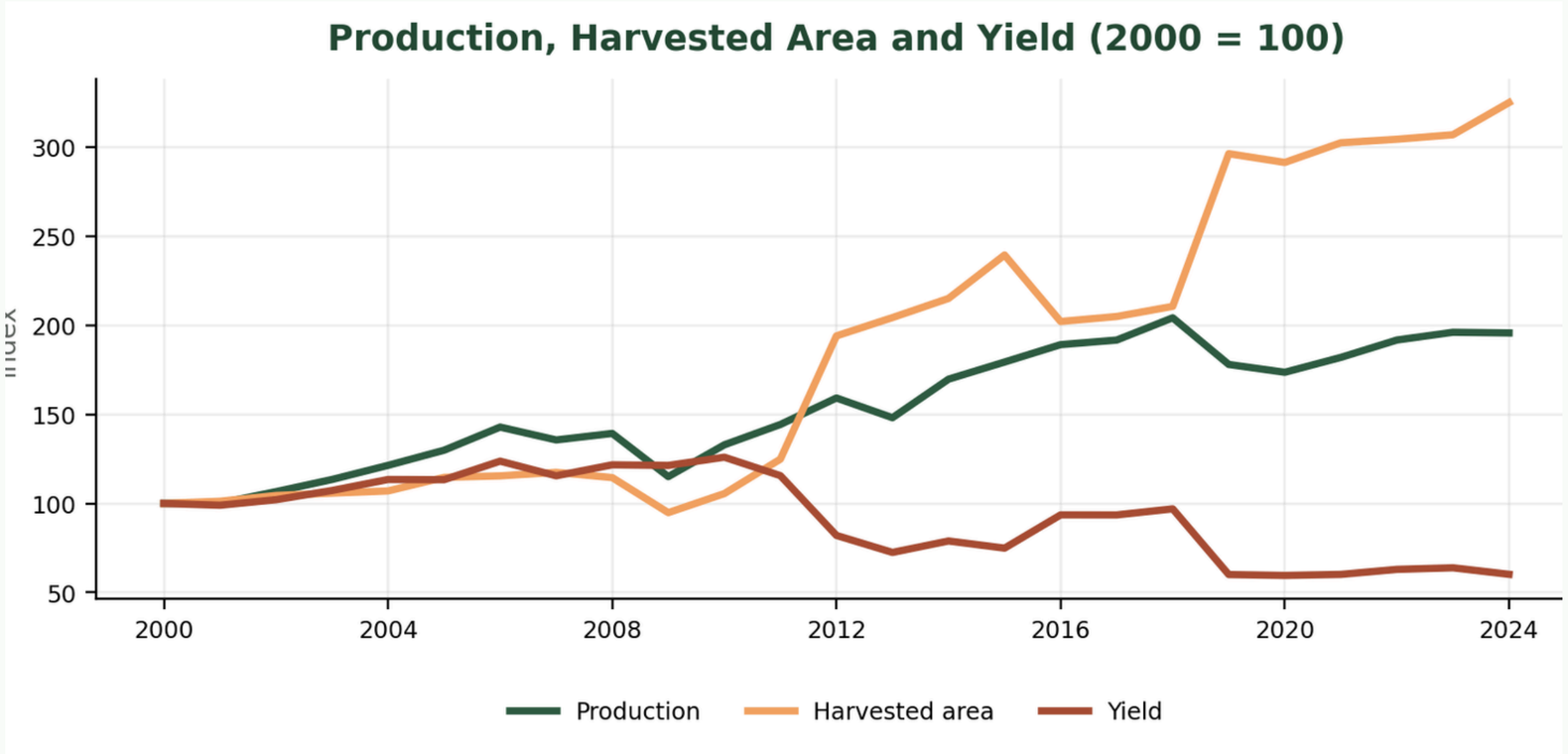
Producer	Output
Nigeria	62.6m t
DR Congo	46.6m t
Thailand	28.6m t
Ghana	27.9m t

Sources: FAOSTAT; author's calculations and analysis

Nigeria’s cassava growth has relied on land expansion, not productivity

Production nearly doubled between 2000 and 2024, but harvested area more than tripled while yield declined.

2024 PRODUCTION	HARVESTED AREA	2024 YIELD
62.6m t	10.7m ha	5.84 t/ha



Indicator	2000	2024	Change
Production	32.01m t	62.62m t	+95.6%
Harvested area	3.30m ha	10.72m ha	+224.9%
Yield	9.70 t/ha	5.84 t/ha	−39.8%

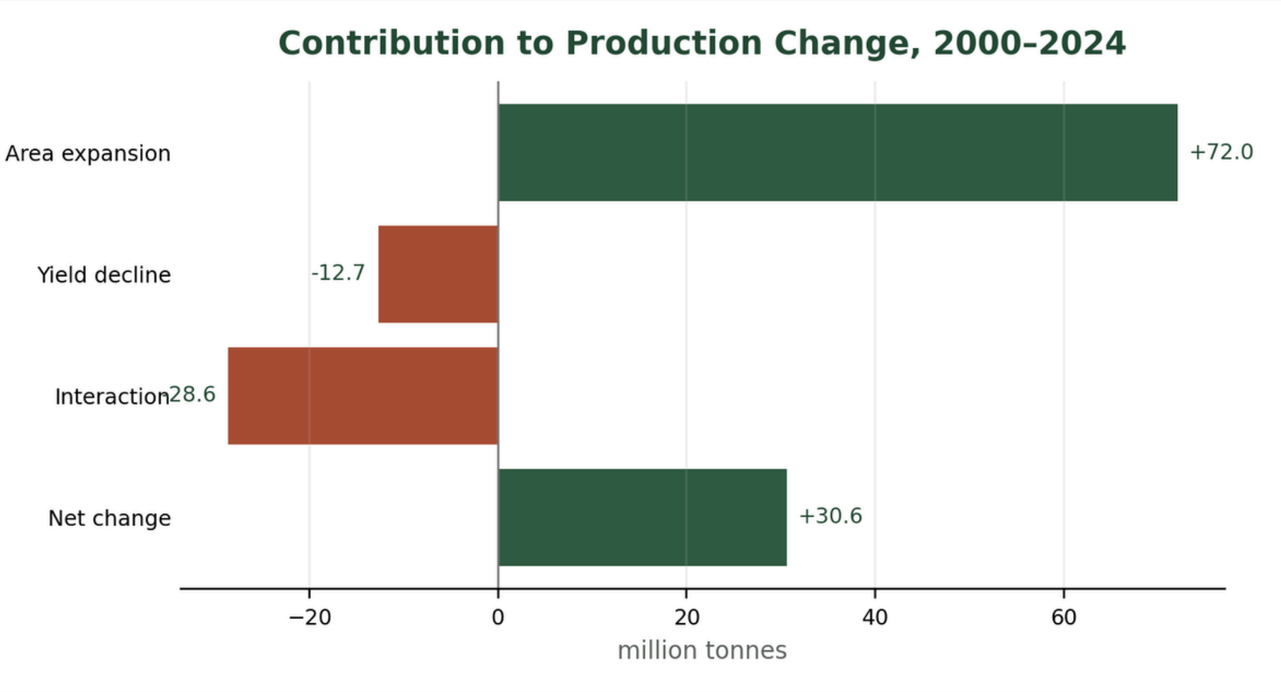
The evidence points to land-led growth: more area, but less output per hectare.

Sources: FAOSTAT; author’s calculations and analysis

Land expansion drove growth, while falling yields erased 41.4 million tonnes

Production rose by 30.6 million tonnes, but the gain was much smaller than the area expansion could have produced.

NET GAIN	AREA EFFECT	YIELD DRAG
+30.6m t	+72.0m t	−41.4m t



Growth component	Effect	Meaning
Area expansion	+72.0m t	Output from more land at 2000 yield
Yield decline	−12.7m t	Loss from lower yield on original area
Interaction	−28.6m t	Loss from larger area at lower yield

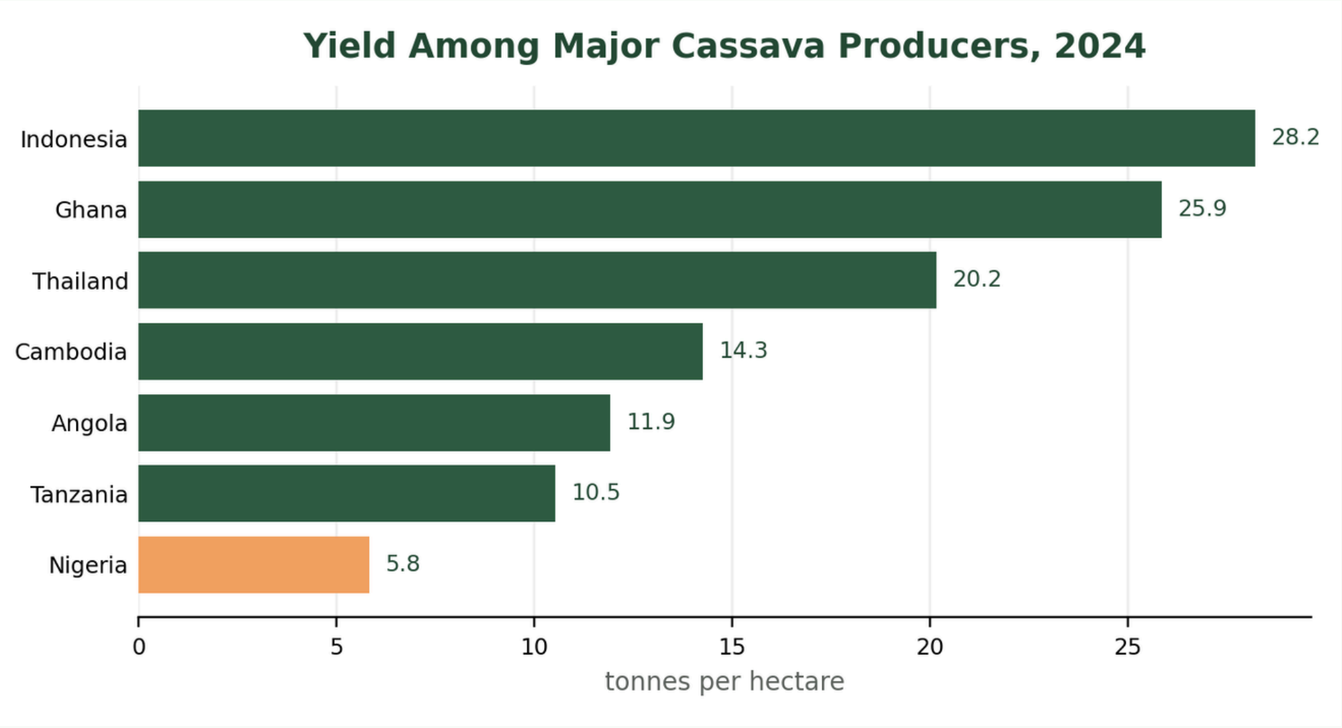
At the 2000 yield, the 2024 harvested area could have produced about 104.0 million tonnes - not 62.6 million tonnes.

Sources: FAOSTAT; author’s calculations and analysis

Nigeria leads in output but has the lowest yield among the top 10 producers

Nigeria cultivated nearly one-third of world cassava area but generated less than one-fifth of global output.

NIGERIA YIELD	WORLD AVERAGE	YIELD GAP
5.84 t/ha	10.18 t/ha	4.34 t/ha



Benchmark	Yield	Achievement	Gap
Nigeria	5.84	100.0%	0.00
Africa avg.	8.16	71.6%	2.32
World avg.	10.18	57.3%	4.34
Thailand	20.16	29.0%	14.32
Ghana	25.87	22.6%	20.02
Indonesia	28.23	20.7%	22.39

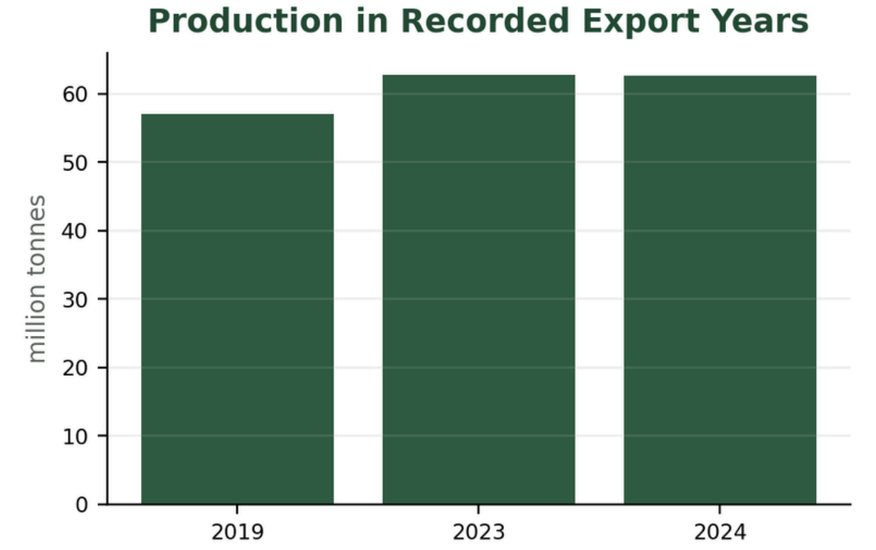
At the world-average yield, the same harvested area could have produced about 109.2 million tonnes - 46.6 million tonnes above actual output.

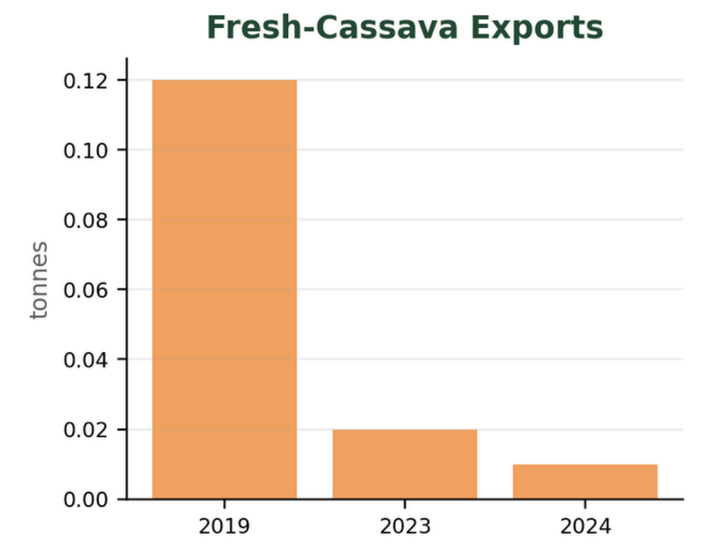
Sources: FAOSTAT; author's calculations and analysis

Production leadership has not translated into fresh-root exports

FAOSTAT recorded 62.6 million tonnes of production in 2024 compared with only 0.01 tonnes of fresh-cassava exports.

2024 PRODUCTION	FRESH EXPORTS	EXPORT ORIENTATION
62.6m t	0.01 t	0.000000016%





Year	Exports	Orientation
2019	0.12 t	0.000000211%
2023	0.02 t	0.000000032%
2024	0.01 t	0.000000016%

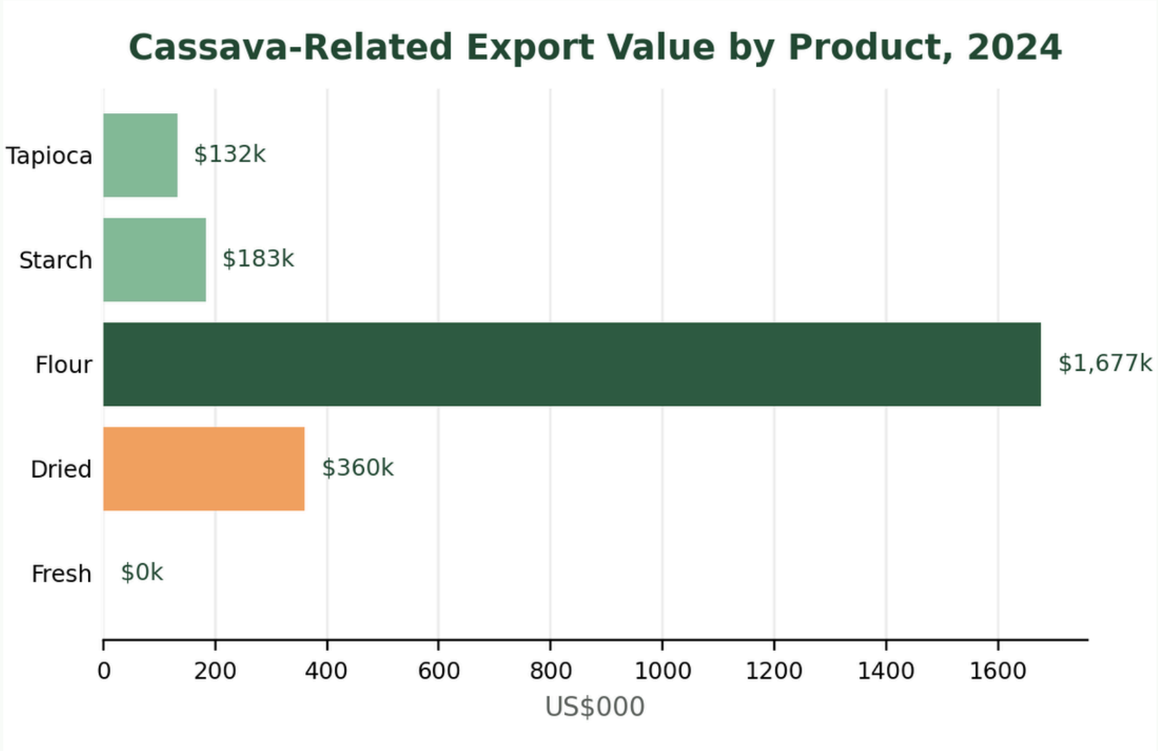
This does not mean Nigeria exports no cassava products. It means fresh-root exports are effectively absent; processed products must be examined separately.

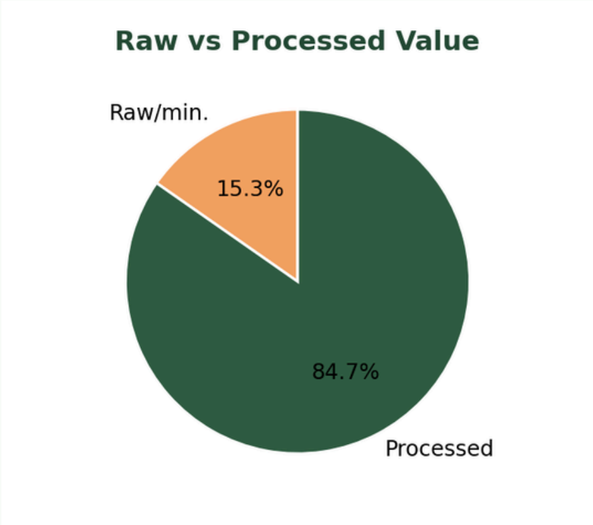
Sources: FAOSTAT; author's calculations and analysis

Cassava flour dominates exports, while starch earns the highest value per tonne

Processed products generated 84.7% of recorded cassava-related export value in 2024.

EXPORT VALUE	PROCESSED SHARE	FLOUR SHARE
$2.35m	84.7%	71.3%





Product	Value	Share	$/t
Fresh	$0	0.0%	—
Dried	$360k	15.3%	$540
Flour	$1,677k	71.3%	$290
Starch	$183k	7.8%	$1,174
Tapioca	$132k	5.6%	$273

Starch represented only 7.8% of export value, but earned about $1,174 per tonne, more than four times flour's average value per tonne.

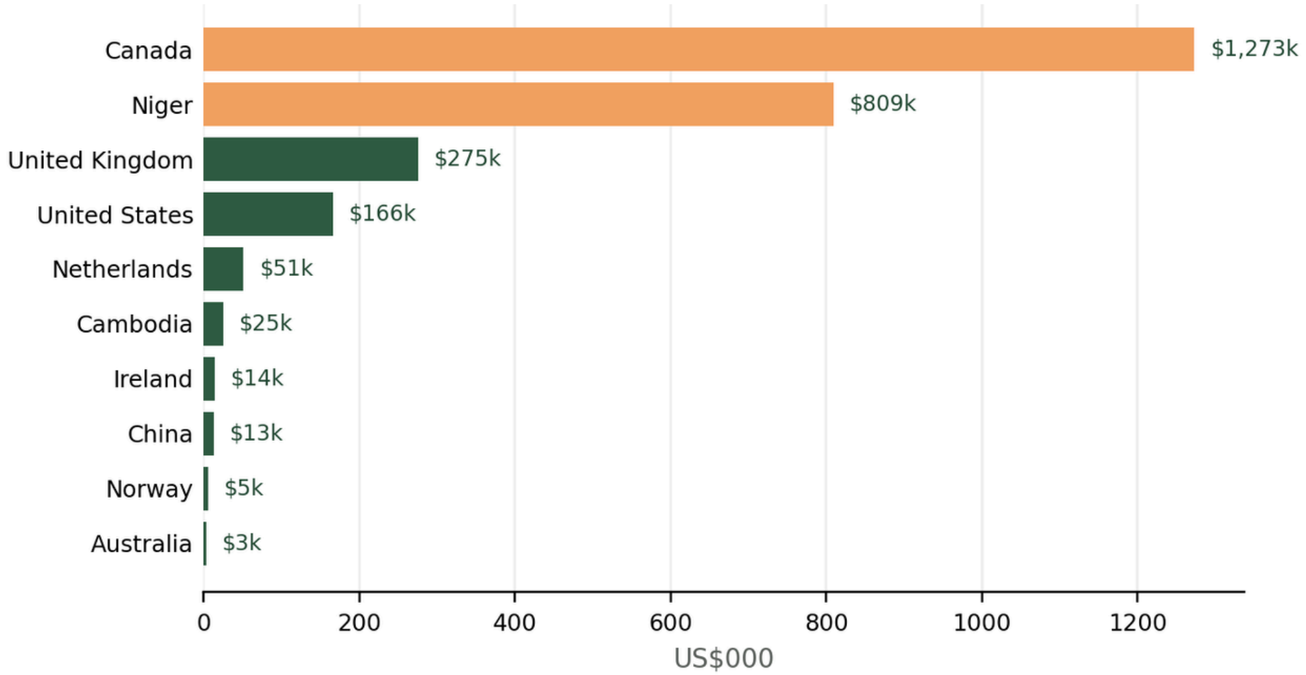
Sources: FAOSTAT; author's calculations and analysis

Canada and Niger absorbed 79% of partner-reported cassava export value

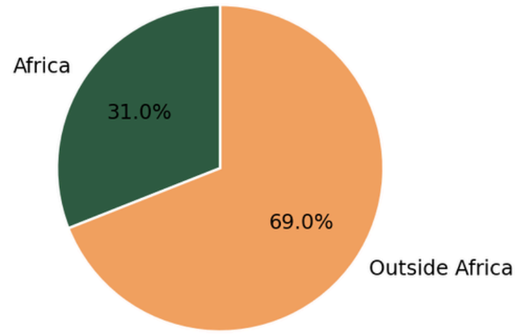
Canada was the largest destination by value, while Niger purchased the greatest quantity.

MIRROR TRADE VALUE	TOP 5 CONCENTRATION	AFRICA VALUE SHARE
$2.63m	97.7%	31.0%

Top Destination Markets by Partner-Reported Import Value, 2024



Export Value by Market Group



Destination	Value	Share	Lead
Canada	$1,273k	48.3%	Flour
Niger	$809k	30.7%	Flour
United Kingdom	$275k	10.4%	Dried
United States	$166k	6.3%	Starch
Netherlands	$51k	1.9%	Dried

Destination analysis uses mirror data: countries reporting cassava imports from Nigeria. Partner-reported value is about 12% higher than Nigeria’s direct export total.

Sources: FAOSTAT; author’s calculations and analysis

Processed exports dominate - but Nigeria captures very little export value from its production scale

Nigeria produced 62.6 million tonnes of cassava in 2024, while recorded cassava-related export earnings totalled only $2.35 million.

PRODUCTION SCALE	EXPORT VALUE	EARNINGS PER TONNE PRODUCED
62.6m t	$2.35m	$0.038

Evidence	Result	Interpretation	Value-chain implication
Production share	18.3%	Global production leader	Large potential raw-material base
Processed export share	84.7%	Exports not dominated by fresh roots	Some transformation is taking place
Cassava flour share	71.3%	Reliance on one basic processed product	Product diversification is limited
Top-five destination concentration	97.7%	Export demand is concentrated	Exposure to market shocks
Fresh-root export orientation	≈0%	Fresh-root exports effectively absent	Domestic economy dominates the root market

Nigeria has moved beyond exporting fresh roots, but the export base remains very small relative to production scale, concentrated in cassava flour and dependent on a small number of destination markets.

Sources: FAOSTAT; author’s calculations and analysis

Nigeria’s biggest cassava opportunity is to create more value from each hectare and tonne

The evidence points to three priorities: raise farm productivity, deepen higher-value processing and diversify export markets.

1. Raise yield	2. Deepen processing	3. Diversify markets
Close the gap between 5.84 t/ha and the 10.18 t/ha world average.	**Move beyond flour toward industrial starch and other higher-value derivatives.**	**Reduce dependence on five destinations that absorb 97.7% of export value.**

Evidence-based gap	Evidence	Industrial opportunity	Expected value-chain effect
Low farm productivity	Nigeria yield: 5.84 t/ha; world avg.: 10.18 t/ha	Improved varieties, planting material, extension and input management	More output without proportional land expansion
Land-dependent growth	Area rose 224.9% while production rose 95.6%	Shift investment toward sustainable intensification	Lower land pressure and stronger output per hectare
Limited higher-value processing	Flour = 71.3% of exports; starch earns ≈$1,174/t	Expand starch, ingredients and cassava derivatives	Greater value per exported tonne
Small export value	62.6m tonnes production versus $2.35m exports	Aggregation, quality assurance, standards and processor linkages	Convert production leadership into marketable output
Concentrated markets	Top five destinations captured 97.7% of value	Develop additional regional and international buyers	Lower exposure to demand shocks

In conclusion, production volume should no longer be the final measure of success. The next phase should be judged by yield improvement, industrial conversion, export value per tonne, and diversified markets.

Recommendations are analytical implications of the evidence based on what I found not official FAO policy prescriptions.

Sources: FAOSTAT; author’s calculations and analysis

A Look at ANNEX

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Year	Production (million tonnes)	Area (million ha)	Yield (t/ha)	Production index	Area index	Yield index
2000	32.01	3.3	9.7	100	100	100
2001	32.07	3.34	9.6	100.2	101.2	99
2002	34.12	3.45	9.9	106.6	104.4	102.1
2003	36.3	3.49	10.4	113.4	105.8	107.2
2004	38.85	3.53	11	121.4	107	113.4
2005	41.57	3.78	10.99	129.9	114.6	113.3
2006	45.72	3.81	12	142.8	115.5	123.7
2007	43.41	3.88	11.2	135.6	117.4	115.5
2008	44.58	3.78	11.8	139.3	114.5	121.7
2009	36.82	3.13	11.77	115	94.8	121.3
2010	42.53	3.48	12.22	132.9	105.5	125.9
2011	46.19	4.12	11.21	144.3	124.9	115.6
2012	50.95	6.4	7.96	159.2	194	82
2013	47.41	6.74	7.03	148.1	204.3	
2016	60.53	6.67	9.08	189.1	202.1	9
2017	61.35	6.76	9.07	191.7	204.9	9
2018	65.35	6.95	9.4	204.2	210.6	9
2019	56.97	9.78	5.83	178	296.3	6
2020	55.57	9.61	5.78	173.6	291.3	5
2021	58.24	9.98	5.84	181.9	302.4	6
2022	61.36	10.04	6.11	191.7	304.4	
2023	62.75	10.13	6.2	196	306.9	6

Metric	Value
Production 2000	32,010,000
Production 2024	62,624,946
Production change	95.60%
Area 2000	3,300,000
Area 2024	10,722,539
Area change	224.90%
Yield 2000	9.7
Yield 2024	5.84
Yield change	-39.80%

Destination	Import value	Value share	Leading product
Canada	**$1,273,000**	**48.30%**	**Flour of cassava**
Niger	**$809,000**	**30.70%**	**Flour of cassava**
United Kingdom of Great Britain and Northern Ireland	$275,000	10.40%	Cassava, dry
United States of America	$166,000	6.30%	Starch of cassava
Netherlands (Kingdom of the)	$51,000	1.90%	Cassava, dry

Rank	Country	Production (tonnes)	Production (million tonnes)	Share of world
1	Nigeria	62,624,946	62.62	18.30%
2	Democratic Republic of the Congo	46,558,022	46.56	13.60%
3	Thailand	28,624,312	28.62	8.40%
4	Ghana	27,917,781	27.92	8.20%
5	Brazil	19,066,096	19.07	5.60%
6	Indonesia	15,624,038	15.62	4.60%
7	Cambodia	14,261,306	14.26	4.20%
8	Angola	11,930,569	11.93	3.50%
9	Viet Nam	10,533,957	10.53	3.10%
10	United Republic of Tanzania	10,532,000	10.53	3.10%