I. BACKGROUND

The Promoting Rice Fortification in Nigeria (PRiFN) project is a 12-month initiative towards building the business case and components of the enabling environment for rice fortification funded by the World Food Programme (WFP) to generate new knowledge, creating a case and roadmap for Rice's adoption of a voluntary fortification food vehicle in Nigeria.

The project is built on evidence from the Fortification Assessment Toolkit (FACT) surveys conducted in Sokoto and Ebonyi states by the Global Alliance for Improved Nutrition (GAIN) Nigeria, which assessed the potential of Rice as a new fortification food vehicle. The survey results revealed that household coverage of Rice was 100% in Ebonyi state and 93% in Sokoto state. The survey also revealed household coverage of Rice in fortifiable form was 83% in Ebonyi state and 40% in Sokoto state. In addition, the intake of fortifiable Rice was 80 g/day in Ebonyi and 97 g/day in Sokoto among women of reproductive age (a group particularly vulnerable to malnutrition).

Nutrition in Nigeria has improved in recent years. However, conflict in the northeast and the impact of the COVID-19 pandemic have significantly eroded these gains. According to UNICEF, Nigeria has the second-highest number of children affected by malnutrition globally, with more than 2.5 million suffering from severe acute malnutrition. Only two of every ten affected children can access treatment (UNICEF, 2018). Nigeria also has the second-highest burden of stunted children globally, with 11.5 million children approximating about 37% under the age of five stunted. With 10.5% of Nigeria’s children wasted (NDHS, 2018). Iron deficiency anemia rates among children under five are estimated at 68.3% (WHO, 2016), 57.8% amongst pregnant women, and 49.8% in women of reproductive (WHO 2016), indicating a severe public health problem. Vitamin A deficiency is also of concern, with 29.5% preschool children with low serum retinol levels (WHO 2005). Overall, only 64 percent of children in Nigeria are thriving without being stunted or wasted (NNHS, 2018).

This project is thus aimed at shaping the policy context and building an enabling environment for the introduction and subsequent uptake of rice fortification in Nigeria alongside key national stakeholders such as the Federal Ministry of Health (FMOH), The standards Organisation of Nigeria (SON), and the private sector. Broadly, it will build political support in-country, working with the key agencies of government and with organisations representing interest groups around rice fortification; and develop a set of voluntary guidelines and standards for rice fortification in Nigeria to be piloted in the second phase of work by producers supplying both the open market and social safety net programmes.

GAIN proposes to carry out analyses, engage in advocacy, and develop guidelines and voluntary standards for rice fortification and an initial focus on the policy context in Nigeria. The project's ultimate objective is to build the foundation for a rice fortification programme in Nigeria that can subsequently improve the consumption of nutritious and safe food (fortified Rice), contributing towards the reduction in micronutrient deficiencies and resultant conditions such as anemia and neural tube defects.
II. **Objectives**

To understand current fortification situation in Nigeria, the opportunities, constraints, technical feasibility and challenges linked to the potential introduction of rice fortification, as well as to evaluate different systems or combination of systems for possible introduction of rice fortification. The landscape analysis will provide an update of 2018 GAIN/FFI Africa Landscape analysis focusing on Nigeria providing an overview of the nutritional situation, national policies and the rice sector industry.

Specific objectives includes the following:

- Map all key stakeholders; industry associations, government, rice kernel suppliers, NGOs and international agencies active or with an interest in rice fortification etc.

- Conduct Rice industry and market analysis including:
  - Rice production and government policies affecting the rice value chain; production, imports, and exports
  - Rice consumption in Nigeria, varieties and consumer preferences and future trends
  - Rice milling industry analysis; large industrial vs small/village mills, milling capacity, level of industry modernization, key players for fortifiable rice, geographic concentration of large scale mills etc.
  - Distribution, and trading (wholesalers, retailers, key institutional markets etc.) imports (with some emphasis on trade and policies of neighboring countries), and exports
  - Pricing, seasonal variability and subsidies (if any)

- Technical feasibility of rice fortification
  - Locally produced rice with imported FRKs
  - Locally produced rice with locally produced FRKs
  - Imported fortified rice

- Review current and potential supply chain options for fortified rice kernels supply;
  - Local production vs imports, including pricing differences
  - Taxes/tariffs.
  - Opportunities/challenges

- Evaluate current and potential rice fortification delivery options both open markets and social safety net programmes e.g. mandatory, voluntary and SSNs
  - Identify the potential in social safety net programs
    - Document and assess current social safety net rice fortification efforts.
    - Volumes, geographies, coverage,
    - Cost implications of fortified vs non fortified rice in social safety net programs
    - Current production capacity and demand etc.
    - Role of (local) government, capacity, incentives, enabling environment including potential barriers and identification of key parties/agencies critical for success.
• Policy context for rice fortification
  o Assess current legislative/policy context; guidelines, standards, any recommendation on micronutrients etc
  o Assess receptivity by policy makers to potential mandatory fortification in future.
  o Summarize key opportunities and challenges of rice fortification
  o Regional alignment i.e. with ECOWAS

• Recommendations for introduction and scaling up rice fortification

III. SERVICES/PROPOSED APPROACH

GAIN is requesting an expert's services to conduct a comprehensive analysis of the rice fortification landscape in Nigeria with the aim of answering the following:
• What is the structure of rice fortification in Nigeria including who is doing what in the rice fortification space and interventions being implemented?
• Who are the key industry/trade associations of relevance to rice fortification in Nigeria?
• What is the current coverage and delivery mechanism i.e., how is the work being implemented?
• Who are the implementing agencies including start and end dates, costs/ budgets analyses, target beneficiaries, funding partners etc.?
• What are the opportunities and constraints to rice fortification in Nigeria and this be strengthened?

IV. METHODLOGY

• Desk research and literature review
• Key Informant Interview (KII) and focus group discussions with government stakeholder participants from relevant regulatory agencies, technical experts, laboratories, and the industry.
• Secondary data analysis

V. EXPECTED DELIVERABLES

• Comprehensive stakeholder map as stated inline with stated objective 1
• Presentation of preliminary results of the landscape analysis were presented at a National Rice Fortification Workshop
• A detailed report (not more than 50 pages incudes annexes) setting out the current framework and operations based on the above research questions. The report should include response to all objective areas set out in Item II above
• A five page executive summary/brief and Presentation deck with infographics to be used for internal and external engagements
III. EXPERIENCE AND SKILLS REQUIRED

• Strong supply chain skills, food technology, good understanding of private sector/milling industry and trade issues particularly between Nigeria and Benin for example, public health and nutrition, including micronutrients
• Technical and working knowledge of Food Fortification (large-scale) with indepth understanding of the political economy of the Nigerian food fortification space
• In-depth knowledge of global nutrition goals, programs, and programs, such as the Sustainable Development Goals, the SUN movement for scaling up nutrition, etc.
• Familiarity with the operations and dynamics of related regional/national government agencies, civil society networks/coalitions
• Excellent research and analytical skills
• Excellent writing and communication skills
• Excellent project and time management skills

IV. TIMELINE

The duration for this assignment is estimated to be from November 22nd to January 2022.

V. SUBMISSION

To apply, please submit a CV, examples of 2 reports of similar work done in the past, a cover letter detailing your experience and a technical and financial proposal for undertaking the work outlined above by 15th November 2021 to ooyekenu@gainhealth.org