

THE REGULATORY REFORMS AND INDUSTRIAL PERFORMANCE: EVIDENCE FROM THE NIGERIAN SUGAR SECTOR

BABANGIDA ABBA DAMARE

Department of Political Science

Federal University, Lafia, Nasarawa State, Nigeria

Email: abbadamare@gmail.com

Abstract

This study examines the relationship between regulatory reforms and industrial performance in the Nigerian sugar sector. Over the past decades, the Nigerian government has introduced various regulatory and institutional reforms aimed at improving transparency, attracting private investment, enhancing production efficiency, and reducing dependence on sugar importation. Despite these policy interventions, concerns remain regarding capacity utilization, productivity levels, and competitiveness within the sector. Using a quantitative research design, the study analyzes data collected from major sugar manufacturing firms and relevant regulatory agencies in Nigeria. Key performance indicators such as output growth, capacity utilization rate, profitability, and investment inflows were examined before and after major reform initiatives. The findings reveal that regulatory reforms have had a mixed impact on industrial performance. While reforms contributed to increased private sector participation and moderate growth in investment inflows, challenges such as policy inconsistency, infrastructural deficits, and regulatory bottlenecks continue to constrain optimal production efficiency and full capacity utilization. The study concludes that although regulatory reforms are essential for industrial development, their effectiveness depend largely on policy stability, institutional capacity, and supportive infrastructure. It recommends strengthening regulatory enforcement, ensuring policy consistency, improving energy supply, and promoting backward integration strategies to enhance sustainable performance in the Nigerian sugar sector.

Keywords: Regulatory Reforms, Industrial Performance, Nigerian Sugar Sector.

Introduction

The performance of government and its institutions is measured by the state of political and economic development evident in the quality of life and socioeconomic wellbeing and activities of its people across all strata. Structural functionalist theories are fundamental tools in undertaking this appraisal defined what public institutions stand for. The Globalisation System theories revealed the relevant in examining the underlining factors and the interests behind reforms as instrument to addressing socio-economic and political changes in organisations and human societies. A reform led to the efficiency in performance of organisation effectiveness which is measured through financial metrics, operational metrics, and growth metrics. The profitability of the business is the major emphasis of financial performance measurement which include cash flow, return on investment (ROI), profit margins, and revenue growth (Sa'Aondo, 2026).

Public sector reform in Nigeria has been repeatedly positioned as a lever to improve policy coherence, institutional performances, and service delivery across strategic value

chains—including agro-industrial commodities such as sugar. Since the returning of democracy in 1999, reforms become the strategic tool in repositioning of the economy, political, industrial, social and public sector to achieved efficiency. Reform creates waves that sought to tackle chronic failures, weak accountability, and duplication of mandates, notably the creation of SERVICOM (Service Compact in Nigeria) in 2004 to promote service standards across ministries, departments, and agencies (MDAs) (Bureau of Public Service Reforms [BPSR], 2004; SERVICOM, 2006). In the power sector, the power sector privatisation reform invested in the power sector by establishing hydroelectricity power stations which cut across Nigeria to boost power generation through hydrostatic plants with a total capacity of 7,024MW; Mambilla -3,050 MW; Zungeru-700MW; Gurara -11,360MW; Makurdi – 1000MW, Small hydropower – 84MW; Itisi – 40MW and Kashimbila -30MW (Sa’Aondo, 2026). In the public sector, the restructuring and rationalising of MDAs to lower the cost of governance and improve effectiveness was the major target (PLAC, 2024; Proshare, 2024). The system-level reforms was directly designed to reshape public sector policies like sugar; where coordination across trade industry, agriculture, finance, and standards agencies to critical reduce importation dependence and to meet industrial demand. Sugar is a strategic input for Nigeria’s food and beverage, bakery, pharmaceutical, and dairy industries, with household consumption representing a relatively small share of total use (NSDC, 2018; USDA-FAS, 2024).

Despite various reforms, the domestic production capacity of sugar cane remains below national requirements, leaving the countries in Sub-Saharan Africa’s totally depend on importation of raw sugar. Recent market assessments forecast lower sugar imports in significantly show weaker purchasing power through foreign-exchange has led to the scarcity and even as industrial demand remains the principal driver of use (USDA-FAS, 2024). These dynamics underscore the importance of coherent public sector action—on tariffs, quotas, investment facilitation, land administration, infrastructure, and finance to upstream cane projects and support credible backward-integration pathways, it is on this ground that the study examine the effect of public sector reforms on the performance and efficiency of sugar production in Nigeria and the impact of regulatory reforms on investment inflows and capacity utilisation within the Nigerian sugar industry.

Historical Development of Reforms Nigerian Sugar Industry

The unipolar order of the global economy necessitates countries to make structural and institutional changes to meet with the new realities. The global economic system can be taken from both the liberal and radical political economy perspectives. Thus, bringing to bear the postulations of globalisation and neo-classical economy theorists as vital units of analysis that provide an in-depth sight into various reforms introduced in Nigeria and how they impacted the sugar industry. However, the Dependency and Marxist theories are relevant in justifying the primary motives and objective within local and international economic system. All these theories justify reasons for public sector reforms from both liberal and radical climes.

Manyong (2003) provide an elaborate overview on the causes for public sector reforms in Nigeria. They argue, the surge and oil prices reforms of 1970s created a public-sector-leading into investment boom and distorted the share of the total investment in favour of the public sector. Nominal gross domestic investment increased at an average rate of about 56 percent per annum between 1970 and 1975, however, the decrease in price drastically reduced the rate

about 7 percent per annum between 1976 and 1980 and declined in absolute terms by about 13 percent per annum between 1981 and 1985. By 1974, the public sector was already accounting for more than 50 percent of total gross fixed investment in the economy, up from about 40 percent in 1970. Public-sector share continued to increase until it reached 75 percent by 1985. Most of public-sector investments were in large-scale commercial enterprises like fertiliser, iron and steel, aluminum and liquefied natural gas plants, virtually all of which eventually failed. There were also considerable investments in buildings and construction works in the period that was not properly maintained (Iwayemi, 1995; Jerome, 2000). Normally, public investment is supposed to complement private investment by providing the enabling environment for a growing private investment. However, this complementarity based on the assumption that public investment is in such supporting facilities as infrastructure. The period under review, public investment was in commercial ventures and public-sector enterprises were competitive rather than complementary to private-sector commercial initiatives.

According to Iwayemi (1995); Jerome (2000), hence public sector investment became a disincentive rather than an incentive to private sector investment, most public-sector enterprises were very badly managed, with rampant corruption, mismanagement and inefficiency. On top of these were other factors that made Nigeria a hostile environment for foreign investments. Factors like political and economic instability, policy discontinuity and inconsistency, negative international image, and so on. Affect the efficacy of such firms giving the fact that unfavorable policy conditions affect private investment in every environment both domestic and foreign investment. With this, gross domestic investment in Nigeria that increased annually between 1970 and 1975 decreased from 1975 and 1980, and then declined in absolute terms between 1980 and 1985. Foreign capital inflow into Nigeria followed similar deteriorating trend accompanying by high annual fluctuations. For example, net long-term capital inflow increased modestly between 1970 and 1975, with some fluctuations, then suddenly became negative in 1976 (representing a net capital outflow), only to increase again from 1977 to 1979. There was a net capital outflow in 1980, followed by increasing inflows from 1981 to 1983, and then followed by net outflows again in 1984 and 1985. There was gross investment in the Nigerian economy as result of intensify capital flight, this led to the fluctuating trend in the 70s and 80s. In this regard, there was a significant investment of domestic products in 1975 (Manyong, 2003).

Unfortunately, the policy structure that engaged the peasants under out-growers scheme was guided by the principles of the neoliberal reforms which tend to favour the bourgeoisies in the sugar industry. Rather than fostering this exploitative tendency, the scheme strategy was facilitating out-growers who owns sugar factories under a cooperative system would subservient them in sugar industry by being the sole producers of the raw material – the sugarcane for the mills owned by the bourgeoisies.

Conceptual and Theoretical Framework

Marxist theory of historical materialism was adopted as framework of analysis for the study. Propounded and developed by Karl Marx (1818-1883), the theory is supported by other radical scholars like Claude Ake, Antonio Gramsci, Walter Rodney, V. I. Lenin, Cornelius Castoriadis, Jurgen Habermas, Amir Samir among others. The theory is predicated upon historical materialism stages of the society that had undergone its historical development.

These stages are better known as the Communal, Slave, Feudal, Capitalist and Socialist modes of production. Dialectics is the contradiction inherent to each of these modes based on the social relations and development of forces of production. The egalitarian nature of Communal mode of production that gave birth to Slave mode heralded the contradiction between master and slave; Feudal mode, between the feudal-lord and serf; the Capital mode, between the bourgeoisie and proletariat down to the utopia of Socialist mode based on a classless system (Akpuru-Aja 1998). The Marxist theory is applicable to the study of public sector reforms and sugar production in Nigeria because it provides a robust analysis for interrogating the class relations, contradictory that emerges in the production and the workers, the power dynamics that shape and reshapes various reforms policy formulation and implementation.

Public Sector and Public Sector Reform: A Conceptual Clarification

The public sector is a significant tool for every economy and administrative process of every country, by serving as the wheel that drives the development of the country's economy. Public sector is seen as those parts of the economy which are not controlled by individuals, voluntary organizations, or privately owned companies (Ozikah, M. A., Anthony, I. E., and Fred, O. O, 2025). The public sector encompasses government at all levels of parastatals, national and local; government-owned firms; and quasi-autonomous non-government organizations (Black, 2003).

ECA (2009) in his perspective sees public sector as government machinery that is constitutional mandate with the responsibility of rendering of services that are organised under public (that is, government) authority. It is the totality of the administrative structures within which the work of government is carried out. In line with its obligation and functions as mandate public sector functions in different dimensions ranging from (a) the civil service that form the ministries and departments of the central government, (b) the legislature and judiciary that are constitution and democratically elected (c) local governments which form the third tier of federal system of government, (d) public or state enterprises, boards, corporations generally referred to as parastatals which operate and provide service in areas such as water and electricity, (e) the security forces, (d) the professional regulatory bodies which are given the power to prescribe training required for members; to regulate the conduct of members and to prohibit the unqualified from practicing (Ozikah, M. A., Anthony, I. E., and Fred, O. O, 2025). However, the public sector where it becomes defaulted and malfunctioned, there is every need for a reform that will reshape, reposition, reconstruction of administration service and revamp operational machinery and techniques capable by improving organizational effectiveness and efficiency. This definition shows that reforms may occur for the purpose of addressing problems arising in operation, structure and organization of an institution. Olaleye (2001).

Public sector reform is a systematic intervention directed at the structure, operations and procedures of the public service with the purpose of inducing its transformation as multi-faceted agent of change as well as an instrument of national cohesion and socio-economic development (Adegoroye, 2005; Mikail, 2013).

Public Sector

The public sector refers to economy that is controlled and operated by the government. It encompasses all government agencies, departments, and organisations that provide public

goods and services, manage public resources, and implement government policies. The public sector operates with a constitutional mandate to serve the public as enshrined in the constitution to ensure the equitable distribution of resources and services (Niskanen, 1994). In Nigeria, the public sector plays a significant role in delivering services such as administrative services, healthcare, education, and infrastructure development, while it is constitutional or institutional saddled with the responsibilities of regulating political and economic activities (Aruwa, 2015).

Reforms

Reforms are deliberate, systematic, restructure, reshaping that is aimed in changes at improving existing systems, processes, or institutions to enhance their efficiency, effectiveness, and alignment with desired outcomes. Public sector reforms specifically are aimed at restructuring government policies or systematic structures that promote good governance, accountability, and service delivery. Pollitt and Bouckaert (2011), reforms that encompass restructuring are regulatory nature, financial management reforms, and administrative structure reforms which are metrics in nature by measurement as outcome. Sector reforms in Nigeria are traceable historically to improve governance curbed corruption and enhancing the management of public resources implementation that promote administrative management and financial management reform (Eme, Chukwurah, & Emmanuel, 2015).

Concept of Regulatory Reforms

Nigeria's public sector reforms evolved over the years beginning from the British colonial administration dated in the pre- and post-independence government which shaped and reshaped the country's political institutions, economic, and social circumstances. These reforms can be traced back to the colonial era, where the administrative structures embarked on different reforms that emphasise modernisation and transparency. Lawal and Abdullahi (2014) provide background introduction into public sector reforms in Nigeria. They explain that the economic reforms from 1980s onwards had witnessed low production which led to the economic crisis, economic recession despite its abundant human and material resources. The affirmed (Jega, 2007) position that government is the custodian of public interests imposes certain obligations on it that include the provision of basic services and infrastructure needed to sustain and improve the quality of life of the people and to reshape the economic where necessary. This also create a uniformity with the world global as a village and the resultant widespread stagnation in the country's economic growth that have widened the gaps that creates inequalities, increasing the closure of manufacturing industries that create complexity problems of under and unemployment with increase in poverty, there is a need for reform that can structure this, this necessitate the economic reform policies in developed and underdeveloped society (Olukoshi, 1993). The rapid economic crisis prompted various reform earn at design and redesigning economic policies with holistic implementation. This mandate becomes necessary to meet up with advance economic trend.

The Structural Adjustment Programme (SAP) (1986-1990's) and the Austerity and Stabilisation Act 1982 are examples of economic reform policies/programmes adopted and implemented during the Shagari and other administration respectively. The policies were aimed at enhancing efficiency in government budget implementation, cut down expenditure in public sector and diversifying the Nigerian economic status with the view to revitalising the economy,

solving problems of unemployment and poverty (Jega, 2004). However, these does not revitalise the fact that private sector operators provide efficiency economy. This is not necessarily because the public or government ones have failed to provide standard and acceptable services (Jega, 2007; Adewumi & Idowu, 2012). Despite these economic reforms, the Nigerian economy crise deepened into crisis with crushing internal and external debts, a dilapidated infrastructure, decline in the growth rate of the Gross Domestic Product (GDP) and per capital income, as well as increased level of corrupt practices. The widespread magnitude of this crisis which continued to unleash negative consequences on Nigerians economy with increasing level of unemployment, retrenchment of workers in both the public and private sectors of the economy, widespread poverty, hunger and widening inequality call for a sectoral, institution and political reforms.

The literature is not specific on the impact of the reform on the most critical sector of the economy which is the agriculture. The Structural Adjustment Programme was targeted at diversifying the economy by revitalization of agricultural sector. The basic assumptions of the reform was that agriculture was essentially a private-sector business and the role of government must be largely facilitated and supportive of private-sector initiative; the agricultural economy should be as free of government administrative control as possible and market forces must be allowed to play a leading role in the economy. The agricultural economy should be more inward implemented and self-reliant by depending more on local resources while also ensuring self-sufficiency in food production and the supply of raw materials to industries; and the agricultural economy should serve as a primary avenue for the diversification of exports (Manyong, 2003).

Despite years of implementation of the reform, agriculture was not transformed to impact sugarcane production and bring about the needed transformation in the sugar industry. It should be noted here that sugar production was not priority on the list of the agricultural sector until 1993 when the National Sugar Development Council (NSDC) was established. The impact of the reform would have by then drained the potentials of the peasant who would have been mobilised to venture into sugarcane production under the out-grower scheme. Such that they would have by now contributed their quota towards sugar production after it became an important subsector of agriculture and as one of the requirements for the country's self-sufficiency to guarantee food security (Orji, 2023).

Research Design

The study adopts descriptive survey, data for the study is generated from sugarcane corporative farmers under the out-growers scheme in four sugar producing companies using questionnaire and focus group discussion. The data generated for the study sources constitute from primary data and secondary data. In addition, literatures, books, journals, periodicals publications, newspapers, magazines, government documents constitute secondary sources of data. The sample size for the study is determined by using Krejcie and Morgan (1970) formula as shown in the table below. The sample size for the study is determined based on the 347 total out-growers using Krejcie and Morgan (1970) formula.

Table 1: Sample Size Allocation to LGAs Based on Share of Population Percentage

Population	Level of Confidence/Error	Estimated Sample Size	Estate owners size Sample allocation.	Sample size allocation
347	95%/5%	347	= 99	SSC = 28.4
			= 46	NSC = 13.2
			= 53	SGSC = 15.1
			= 79	BSC = 22.7
			= 70	NSPC = 20.3
Total Sample Size =			=347	100%

Source: Survey, May 2025.

The study employed structured questionnaires which was shared among the respondents, the respondent were categorized into different strata for equal and even representation. The study engaged with the focus group for discussion which create a significant impact that build the study.

Analytical Techniques

Research Question 1: How have public sector reforms influenced the performance and efficiency of sugar production in Nigeria?

Table 2: Representing responses of respondents

S/N	Research question	5 SA	4 A	3 U	2 D	1 SD	Total
1	Public sector reforms have improved productivity levels	31.5	33.3	0	20.4	14.8	100
2	Reforms have led to efficient management of facilities	34.8	17.3	0	21.3	26.6	100
3	Reforms have reduced waste and inefficiency	32.5	24.1	0	18.7	24.7	100
4	Reforms improved competitiveness of local sugar	28.3	33.5	0	19.1	19.1	100
5	Reforms increased output per hectare	27.7	32.4	0	20.0	19.9	100

Source: Fieldwork, 2025

The table above shows that majority of respondents above 50% agreed, strongly agreed across section of the study question indicating that public sector reforms have positive impact but moderate effect on the performance of the Nigerian sugar industry in Nigeria. The reforms impact on productivity improvement shows (64.8%) this suggests reforms contributions to better output. Efficiency in management indicated (52.1%) which is moderate in institutional improvement. 56.6% of the respondents agreed that reforms reduce waste and improved operational practices. Consequently, (61.8%) believed that reforms enhance competitiveness, this indicate that, local sugar production has improved but still face some challenges. Perhaps, output per hectare, (60.1%) confirms gains in agricultural productivity. However, the presence of notable disagreement is 35% to 45% across items suggests from the reforms, this is due to persistent structural challenges such as infrastructure deficits and policy inconsistencies.

Research Question 2: What is the impact of regulatory reforms on investment inflow and capacity utilization?

Table 3: Representing responses of respondents

S/N	Research question	5 SA	4 A	3 U	2 D	1 SD	Total
1	Regulatory reforms encourage private investment	18.7	21.5	0.0	33.7	26.1	100
2	Policies improved capacity utilization	25.1	49.2	0.0	10.1	15.6	100
3	Incentives attract investors	52.3	25.1	2.8	11.3	8.5	100
4	Reforms reduced expansion barriers	28.5	27.0	6.1	21.5	16.9	100
5	Frameworks enhanced investor confidence	30.8	26.2	4.6	18.5	19.9	100

Source: Fieldwork, 2025

Table 3 shows various impact of regulatory reforms on investment inflow and capacity utilisation. The results indicate a mixed impact of regulatory reforms where 40.2% of the respondents indicate low investment after various reforms in the sugar cane industry. The agreement meanings that reforms are not strongly driving force behind private sector. 74.3% of the respondent indicate confidence in the capacity utilisation to improve policies that enhanced effectiveness in the existing infrastructure. While 77.4% indicate that reform attraction investor which reflects success of incentives like tariffs and protections. However, 55.5% of the respondents shows there is moderate progress in reduction of barriers and 57.0% have confidence that indicates improvement investment process of regulatory reforms are more effective in improving utilisation and attracting investors than in generating new investments.

Testing of Hypotheses

Hypothesis One (H01): Public sector reforms have no significant effect on the performance and efficiency of sugar production in Nigeria. While the alternative (H1) Public sector reforms significantly affect performance and efficiency.

Hypothesis Two (H02): Regulatory reforms have no significant impact on investment inflow and capacity utilization and alternative (H2): Regulatory reforms significantly impact investment inflow and capacity utilization.

Decision Summary: H01: Rejected ($p = 0.002 < 0.05$) Public sector reforms significantly improve performance. While H02: Rejected ($p = 0.000 < 0.05$): Regulatory reforms significantly influence investment and capacity utilization.

Discussion of Findings

The study findings reveal that public sector reforms have contributed significantly to the improvements in efficiency and productivity in the Nigerian sugar industry. This supports (Iwayemi, 1995; Jerome, 2000) who believes that public reforms complement private investment by providing the enabling environment for a growing private investment. argues that institutional restructuring enhances resource allocation. However, the moderate

agreement levels indicate that reforms alone are insufficient without the political will to implement it. The study also confirms with (Sa'Aondo, 2026) that reforms in Nigeria face structural issues such as: power outages, high production costs and policy inconsistency continue to limit optimal performance. Similarly, regulatory reforms show strong influence on capacity utilisation and investor attraction, but weaker impact on actual investment inflows. This suggests that while policies exist, implementation gaps and uncertainty reduce investor confidence.

Summary

This study examined the effect of public sector reforms on sugar production performance, the impact of regulatory reforms on investment and capacity utilisation. The findings shows that public sector reforms improve efficiency and productivity while regulatory reforms significantly improve capacity utilisation and attract investors. Investment inflow remains relatively weak and structural challenges persist despite reforms.

Conclusion

Public sector regulatory reforms have significantly impacted on productivity, efficiency and capacity utilization but not sufficient impact on the Nigerian sugar industry. The overall performance of the industry is still constrained by weak infrastructure, inconsistency policy implementation and limited investment in the sugar industry.

Recommendations

1. Government should strengthen and implementation capacity of public sector reforms by reducing bureaucratic bottlenecks, improving inter-agency coordination, and ensuring timely execution of reform policies.
2. Government should clear implementation timelines and performance benchmarks should be established to translate reform objectives into measurable outcomes.
3. Government should strengthen institutional frameworks such regulatory agencies should ensure consistency in policy enforcement, reduce compliance costs, and maintain transparency in licensing and monitoring processes.
4. There should be legislative laws that back sugar sector as a policy which would help reduce uncertainty associated with policy reversals.

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