VALUE CHAIN ANALYSIS OF ARTISANAL FISHING IN ILAJE LOCAL GOVERNMENT AREA OF ONDO STATE, NIGERIA

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- 4 The demand for fish like all other animal proteins in Nigeria has surpassed the supplies leaving the
- 5 general populace in sub-optimal protein consumption. In bridging this supply demand gap, Nigeria must
- 6 explore her artisanal fisheries and aquaculture resources which have been found to be under-utilized.
- 7 Hence, value chain analysis in artisanal fishing in the coastal area of Ondo States were analyses in
- 8 artisanal fishing in the coastal area of Ondo States were investigated.
- 9 Primary data were collected with the aid of a well-structured questionnaire. A purposive
- 10 sampling technique was used to select four fishing communities in Ilaje local government, where
- 11 35 (fishermen, processors and marketers) were each selected randomly from the communities.
- 12 Data were analyzed using Descriptive Statistics and Gross Margin Analysis.
- 13 The socioeconomic characteristic indicated that 68.6% of the fishermen, 77.2% processors and
- 14 65.7% marketers were less than 50 years of age. The gender of the respondents revealed that all
- 15 (100%) of the fishermen were male, 91.2 % processors and 97.10% marketers were female. The
- 16 study also indicated that 62.9% of the fishermen has household greater than 4, the processors
- 17 has 54.3% household size above 4 and 60% of the marketers have household size above 4. The
- 18 educational status of the respondents indicated that 94.3% of the fishermen hashave one form of
- 19 education or the other, 77.1% of the processors have one form of education or the other and
- 20 65.7% of the marketers were also educated. The study equally showed that all the marketers are
- 21 | into one association or the other. The budgeting analysis revealed that a positive margin
 - realized by the two categories of marketers werea positive margin realized by the two categories
- of marketers was \\$300.54 and \\$1,866.00 per basket respectively and \frac{a net returns}{a} net return of
- 24 1.04 and 1.30 respectively. The processors equally had a positive gross margin of \(\frac{\text{\tilch{\text{\texict{\text{\text{\text{\texiclex{\text{\texi}\text{\text{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi{\texi}\texi{\texi{\texi{\texi{\texi{\texi{\tiinte\tinz{\
- 25 and a net returns a net return of 1.12. The most influential actor in the artisanal fish value chain
- 26 were the marketers, this is because of the strong associations involved in this category, which
- 27 prevent others from buying directly from the fishermen.
- 28 Keywords: Value Chain, Artisanal, Gross Margin, Analysis, Fishing.
- 29 Introduction

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- 30 Fishery production is significant to Nigerian economy in view of its importance in providing
- 31 cheap source of food security, income, employment and serves as source of foreign exchange,

particularly those of the riverine communities (NBS 2016). The Fisheries sub-sector is an 32 integral part of agriculture sector in Nigeria. It maintains a steady contribution of about 3.5 to 4% 33 of total GDP between 2008 and 2012, translating to about 10% of total agricultural GDP, which 34 35 itself contributed between 35 and 40 percent within the same period (Oladimeji et al., 2013b). 36 Fish supply is from four major source namely; artisanal fisheries, industrial trawlers, aquaculture and imported frozen fish (Akinrotimi, Abu and Aranyo, 2011). The Nigeria fisheries sector is 37 made up of capture fisheries and aquaculture. Capture fisheries encompasses both marine and 38 inland fisheries. Artisanal fisheries sub-sector remains the most important sector, it accounts for 39 the major fish supply in the developing world (Ibrahim, et al., 2009) 40

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- 41 Artisanal fisheries in Nigeria provided more than 82% of the domestic fish supply giving
- 42 livelihoods to one million fishermen and up to 5.8 million fisher folks in the secondary sector
- 43 (Faturoti, 2011). The total fish demand for Nigeria based on the 2014 population estimate of
- 44 about 181 million is 3.32 million metric tons, while the domestic fish production from
- 45 Aquaculture, Artisanal and Industrial fisheries for 2014 is 1.123million metric tons. Although,
- 46 aquaculture production increased considerably over the years, from 152,796 metric tons in 2009
- 47 to 221,128 metric tons in 2011 and 3.32 million metric tons in 2014. (NBS 2016).
- 48 The opportunity of bridging the widening demand- supply gap of fish in Nigeria through
- 49 domestic production offers a great investment potential to the Nigerian populace and also the
- 50 inflow of foreign direct investment into the country.
- 51 The Niger Delta region contributes more than 50% of the entire domestic Nigerian fish supply.
- 52 This is as a result of abundance of both fresh, brackish and marine water bodies that are
- 53 inhabited by a wide array of both fin fish and non-fish fauna that supports artisanal fisheries.
- Nigeria has a great potential of fish resources whose distribution and value chain needs to be
- strengthened and developed to bridge the gap between demand and supply of fish in Nigeria.
- 56 According to (Adeleke, 2013), the acceptability of fish in most communities of the world is due
- 57 to fish high digestibility compared to beef, mutton, chicken and bush meat. (Adeleke, 2011) also
- 58 observed that fish consumption is free from taboos as is the case for most meat products.
- 59 Artisanal fisheries are important and contributed at least 40% of fish production from all sources
- in Nigeria between 1995 and 2008 (FAO, 2010). Artisanal marine fisheries provide essential

- source of sustenance, employment and financial well-being for coastal populations of developing
- 62 countries (Andrew et al., 2012)
- 63 Fish is highly susceptible to deterioration without any preservative or processing measures
- 64 (Okonla and Ekelemu, 2015). Immediately fish dies, numbers of physiological and microbial
- deterioration sets in, this invariably degrades the quality of fish (Eyo, 2001). The deterioration
- 66 that sets in makes it unfit for human consumption within about one day of capture, unless it is
- 67 subjected to some form of processing, particularly if traditional methods have been pro-used,
- 68 thus, subjecting the fish to many forms of loss and spoilage. Fish being a highly perishable
- 69 substance needs to be transported to the consumer who is the final user on time to avoid post-
- 70 harvest spoilage through a coordinated marketing channel.
- 71 Value chain refers to all activities necessary to bring a product or service from conception,
- 72 through the different stages of production, distribution to final consumption and final disposal
- 73 after use (Kapslinky and Morris, 2000, Adeoye et al, 2013). Value chain promotion is an effective
- 74 way of encouraging rural-urban linkages and the perception provides a useful analytical
- 75 background for market and sub-sector analysis. Value chain analysis is the process of breaking a
- 76 chain into its constituent parts so as to have a better understanding of its structure and
- 77 functioning parts.
- 78 The analysis of value chain involve identifying chain actors and discerning their functions;
- 79 identifying value added in the chain and assigning costs to those activities (United Nation
- 80 Industrial Development Organization 2009).
- 81 Files (2007) posited that value chain analysis is essential for understanding markets, their
- 82 relationship, the participation of different actors, and the critical constraints that limit the growth
- 83 of livestock (fish) production and consequently the competitiveness of small holders' farmers.
- These farmers currently receive only a small fraction of the ultimate value of their output, even
- 85 if, in theory, risk and reward should be shared down the chain. In agriculture they can be thought
- 86 of as a farm to folk' set of processes and flows. Artisanal fish value chain analysis looks at every
- step, a fisheries business goes through, from captured fishes to the eventual end user. The goal is
- 88 to deliver maximum value for the least possible total cost.

- 89 Value chains in artisanal and aquaculture fisheries differs and composed of several nodes the
- 90 products pass through before meeting the consumers. Moreover, fishery value chain can be
- 91 defined as interlinked value-adding activities that convert inputs into outputs, which in-turn add
- 92 to the bottom line and help to create competitive advantage.
- 93 However, Fish value chains in Nigeria are not yet developed to meet international market
- 94 requirements as limited value addition is done in the industry, with the result that market for fish
- 95 and fish products are limited to domestic markets (Investopedia, 2011), and the eagerness to raise
- 96 immediate income from fish harvest. Actors in the chain comprises of the fishermen, (fish
- 97 collector) marketer and processors.

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- 98 The ability to make fish relevant in the market is to ensure the flow of fish and fish product from
 - the artisanal fisherman to the consumers in the form, time and place that will be convenient. This
- 100 involves the participation of some actors along the fish distribution channel especially the
- middlemen. (Lawal and Idega, 2004). According to (Adekanye, 1988), marketing is a method
- 102 used to bring the interpersonal forces of demand and supply together irrespective of the location
- 103 of the market. The different criteria used in sales of fish depend on efficiency with which the
- marketing system transmits information among the fish mongers or marketers and thus, prices of
- fish changes as it passes through middlemen such that by the time it finally get to the consumers,
- it becomes expensive (Dolapo, 2011).
- 107 This study is imperative because, most research work in the study area focus mainly on artisanal
- 108 fishing and marketing, while the areas of value chain / value addition were uncovered. It is in the
- 109 light of this that the research has been conceptualized to analyze value chain in artisanal fishing
- in the coastal area of Ondo State.

111 Objective of the Study

- The main objective of the study is to analyze value chain in artisanal fishing production in the
- 113 coastal area of Ondo States of Nigeria,
- 114 The specific objectives are to:
- i. ascertain or determine the socio-economic characteristics of the actors in the fish value
- 116 chain;

- ii. identify the major players (actors) in artisanal fish value and;
- iii. estimate the profit margin along the identified fish value chain;
- iv. identify the major constraints to fish value chain actors in the study area.

120 Methodology

121 The Study Area.

- 122 The study was carried out in Ilaje Local Government Area of Ondo State, Nigeria. The state lies
- between latitudes 5° 4S and 7°52N and longitude 4° 20°N and 6° 05E. Its land area is about
- 124 15,500 square kilometers. Ondo State is bounded in the East by Edo and Delta State in the south
- by Bight of Benin and Atlantic Ocean. Ilaje was purposively selected due to its predominant
- 126 coastal wetland suitable for fish farming. It is situated within the mangrove rain forest and has an
- annual rainfall ranging between 2000-3000mm per annum.

128 Data Collection and Sampling Technique

- Data were collected through primary source with the aid of well-structured questionnaire.
- 130 Purposive sampling techniques were used in the selection of four fishing communities namely;
- Awoye, Odofado, Zion Pepe and Araromi sea side. The selection was based on their fishing
- intensity. From the selected communities, 35 fishermen, 35 processors and 35 marketers were
- randomly selected at the central market arena to give a total of 105 respondents.

134 Data Analysis and Analytical Procedure

Data were analyzed using descriptive statistics and gross margin model

136 Descriptive Statistical Tools

- 137 Frequency tables, and percentage were used to describe the socio-economic characteristics of the
- 138 respondents. The characteristics include the age, marital status, educational attainment, primary
- or major occupation, experience of the fishermen, marketers and the processors.

Gross Margin Analysis

- 141 The budgeting techniques was used to determine the gross margin and income at each stage of
- 142 the chain.

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- The model for the estimation of the gross margin is as; $GMI = \sum TR \sum TVC$
- Where; TR = Py. Yi, $TVC = P \times X$, TC = TVC + TFC, NROL = NFI/TR, NFI = GM TFC
- 145 NPM = NFI / TC, BCR = TR / TC
- 146 GM = Gross Margin (N) 152 Y = Price of Output (N)
- 147 TR= Total Revenue (₹) 153 PXi = Unit Price of Variable Input Used
- 148 TVC = Total Variable Cost (\aleph)
- 149 TC = Total Cost (N) 155 Xi = Variable Input (N)
- 150 NROL = Net Return on Investment (₹) 156 NFI = Net Farm Income (₹)
- 151 Py = Unit Price of Output (₹)
 - 158 BCR = Benefit Cost Ratio (%)

159 **Depreciation**

- 160 Depreciation on fixed assets used were calculated, using a straight line method (SLM) which
- assumed salvage value of zero naira. The formula is specified as; DS =
- Where: DS = Annual depreciation, AC = Asset Cost, SV= Salvage Value, L = Useful Life Year.
- 163 Results and Discussion
- 164 The actors in the artisanal fish value chain in the study were identified as; the fishermen, fish
- processors and fish marketers.
- 166 Socio-Economic Characteristics of the Fishermen in the Study Area
- 167 Gender of the Respondents
- The result as shown in table 1 indicated that all fishermen in the study area were male (100%).
- 169 This could be attributed to strenuous and tasking nature of their operations which the male
- 170 gender could possibly handle better than the weaker female counterpart. These findings is in line
- with the finding of Onemolease and Oriakhi (2011). Olubanjo et al (2007), Olaoye and Odebiyi
- 172 (2011), Olawunmi et al (2010). Majority of the processors (91.2%) and marketers (97.10%) were
- 173 female, indicating the dominance of women in processing and marketing of fish in the study

area. This result is in line with the findings of Inioni and Olayide (2007), who opined that the role of women in fishing cannot be over emphasized.

Age of Respondents

The study revealed that majority of the actors in the value chain were study revealed that majority of the actors in the value chain was below 50 years of age. This implied that majority of people involved in fishing operations are in their active age. This finding agreed with Bello, (2000) and George et al (2010) that age had a positive correlation with agricultural productivity.

Household Size

The relatively large and medium household sizes of majority of the actors in the study area may reduce expenses incurred on hired labour for the operations.

Educational status/ Membership of Association

The study also revealed that majority of the actors (94.3% of fishermen, 54.3% of processors and 51.4% of marketers) had one form of education or the other. Therefore the number of years spent in formal education enhances the knowledge ability to adopt modern technology in improving their fishing activities.

The study further indicated that all (100%) of the marketers were in one form of union/association or the other, while the fishermen and the processors were not into any form of association.

Table 1; Socio-Economic Characteristics of the Respondents

Variables	Fishermen		Processors		Marketers	
	Freq.	percent	Freq.	percent	Freq.	percent
Gender						
Male	35	100.0	2	8.8	1	2.90
Female	0	000	33	91.2	34	97.10

Total	35	100.0	35	100.0	35	100.0
Age						
Less than 30	5	14.3	5	14.3	4	11.4
31- 50	19	54.3	22	62.9	19	54.3
51-60	7	20.0	3	8.5	12	34.3
61-65	4	11.4	5	14.3	0.00	0.00
Total	35	100.0	35	100.0	35	100
Marital status						
Single	4	11.4	1	2.83	2	5.7
Married	21	60.0	28	80.0	27	77.1
Divorced	5	14.3	6	17.14	4	11.4
Widow/widower	5	14.3	0	0.00	2	5.7
Total	35	100.0	35	100.0	35	100.0
Household size						
1-3	13	37.1	16	45.7	14	40.0
4-7	17	48.6	19	54.3	18	51.4
Greater than 7	5	14.3	0	0.0	3	8.6
Total	35	100.0	35	94.6	35	100.0
Educational status						
No formal	2	5.7	8	22.9	12	34.3
Pry	10	28.6	15	42.8	9	25.7
Sec	7	20.0	5	14.3	9	25.7
Tertiary	16	45.7	7	20.0	5	14.3
Total	35	100.0	35	100.0	35	100.0
Association						
Yes	-	-	-	-	35	100

No	-	-	-	-	-	-

194 Source; field survey, 2019

Table 2: Descriptive Statistics on Cost and Returns of Marketers

	N	Minimum	Maximum	Sum	Mean	Std. Deviation
Price/ basket fish	35	3,000.00	15,000.00	216,781.75	6,193.7500	2,544.68928
Price after purchase	35	3,500	17,000	244,800	6,994.29	2,981.901
Price outside the environment	35	4,000	20,000	282,100	8,060.00	3,245.830

Source; field survey, 2019

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From table 2 above, the average cost of purchase of a standardized basket of fresh fish from the fishermen in the study area was №6, 193.75.00, immediately after purchase, and without any value addition, the same quantity of fish were sold at an average of №6, 994, 29 and №8, 060.00 outside the environment. The implication of this, this is that non-member of fish marketers association have no direct contact with the fishermen, hence must pass through them for the purchase of fish, while a profit margin of about №801.29 is realized from immediate purchase within the same environment and an average of №1866.25 from the sale of same basket outside the environment.

Profit Margin of Marketers

- Average purchasing price of fish from fishermen = $\Re 6193.75$
- Average selling price immediately in the same location = ₹6494, 29
- Average selling price outside the location = $\frac{1}{8060.00}$

i. Profit margin of marketers on same location

- Average revenue from sales in same location = $\frac{1}{100}$ 6494, 29 $\frac{1}{100}$ 6193.75 = $\frac{1}{100}$ 300.54
- Net return on investment (benefit/cost) = 6494, 29/6193.75 = 1.04
- 211 That is on every ₹1 invested in fish marketing in the same location and sell within the location
- 212 4kobo is realized.
- 213 ii. Profit margin of marketers outside the location
- Average revenue from sales outside the location = \aleph 8060.00 \aleph 6193.75 = \aleph 1866.25
- Net return on investment = $\frac{130}{200}$ benefit/ $\frac{130}{200}$ benefit/ $\frac{130}{200}$
- The implication of this findingsthis finding is that on every \text{\text{N}}1 invested, 30kobo is realized

Gross Margin Analysis For Fish Processor

- 217 Average variable cost
- Average cost of fish purchased = ₹260, 508. 10, Average Cost of firewood = ₹27,437.14
- Average transportation cost = \$1,018.57, other variable cost = \$2,146.57
- 220 Average labour cost = \$10,925.71, Average variable cost = \$302,036.09
- 221 Fixed cost
- 222 Cost of drum = \$14,271.42 Cost of basket = \$25,485.71
- 223 Cost of wire = $\frac{1}{2}$ 9,868. 57 Average fixed cost = $\frac{1}{2}$ 49625.70
- 224 Average total cost (ATC) = AVC+ AFC = $303,036.09 + 49,625.70 = \frac{13}{2}352,661.79 =$
- 225 $\Re 352,661.79$ Average revenue = Px*QX, $AR = \Re 396,533.33$
- 226 Profit = AR ATC = 396, 533. 33 352,661.7 = ₹43, 871, 54
- 227 Fish processing is a profitable venture worth investing because it has a positive margin of
- **≥**228 ₹43,871.54.
- Net return on investment for fish processing =
- = = 1.12

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- The return on investment is 1.12, meaning that on every ₹1 invested in fish processing, 12kobo
- 232 is realized.

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Depreciation on fixed equipment

- 235 OC = 41,903.78, SV = 0
- 236 It is assumed that equipment has a shelf life of 3 years
- 237 41,903.78/3 = 13,967/ annum
- 238 Monthly depreciation = 13,967/12 = 1,163.99
- = ₹1,163. 99 must be set aside as depreciation value.
- 240 The main actor in the value chain are the marketers because of the strong association that
- 241 prevent others from buying directly from the fishermen, even the processors sometimes do not
- 242 have direct access to the fishermen except through the marketers

243 Table 3: Gross Margin and Net Return of Actors.

Variable	Gross Margin	Net Return
Sales/Marketing at immediate environment	300.54	1.04
Sales/Marketing outside the environment	1866.25	1.30
Processor	43871.54	1.12

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- The table 3, shows the categories of the gross margin of the actors in the value chain
- All the actors have a positive gross margin therefore each of the enterprise is profitable. Also all
- the net return on investment are greater than one therefore the sales of fish immediately at the
- 248 environment was 1.04 indicating at every №1 invested, 4 kobo is realized, marketers outside the
- 249 environment has a net return of ₹1.30kobo. Meaning that at every ₹1 invested 30kobo is
- 250 realized while for processing net return of ₹1.12kobo is achieved meaning at every ₹1 invested
- 251 12kobo is gained. The implication is that the marketers particularly sales after the environment
- has higher gross margin of ₹1866.25 kobo and a net return of ₹1.30 kobo.

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Conclusion

- 256 Artisanal fish farming is a profitable venture with all the actors in the value chain enjoying
- 257 different degree of profit. The two categories of marketers made a profit of №300.54 and
- 258 N1,866/basket and a net returns a net return of 1.04 and 1.30 respectively. The processors equally
- had a positive gross margin of ₹43.871.54 and a net returns a net return of 1.12.
- 260 However, among the three actors in artisanal fish value chain in the area, the marketers are the
- 261 main and most influential group. This is due to the strong associations of the group which
- 262 prevent others (even processors) from buying directly from the fishermen. The over bearing
- 263 influence of this marketers group reduces the gross margin and net returns of other actors in the
- 264 chain.

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Recommendation

- Based on the findings of this study, it is recommended that;
 - Fishermen and processor in artisanal fish value chain should form a strong association in other to reduce the effect and influence of the marketers on their profit.
 - Fishermen should join cooperative societies in other to get needed inputs rather than getting financial assistance from middlemen/marketers who always use that to determine their faith in the business.
 - Government and other relevant organizations should be involved in training and retraining of the different categories of the artisanal fish value chain players.

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