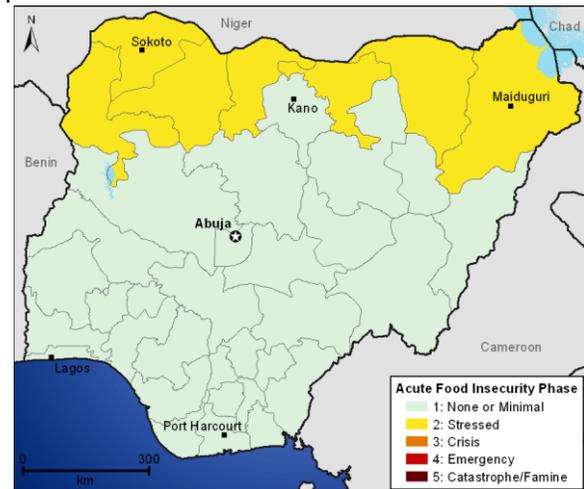


## NIGERIA Food Security Outlook

April to September 2012

- The annual weather outlook issued by ECMWF, IRI and NIMET indicates an average rainy season in most areas throughout the country between April and September, likely resulting in a good October/November harvest.
- The greatest food insecurity concerns remain in the extreme north, particularly in the northern most parts of Borno, Yobe, Jigawa states in the northeast, and also the northern most parts of Kano, Katsina, Zamfara, Sokoto and Kebbi states in the northwest. These areas were affected by the prolonged dry spells during the 2011 growing season with significant shortfalls in cereal production.
- In April, off-season exports amounting to 50,000 tons of grain in mid April for the Sahelian countries and continued informal trade are likely to result in additional cereal price hikes in May/June before the lean season in the north. To prevent further cereal price increases, the GoN has banned future cereal exports.

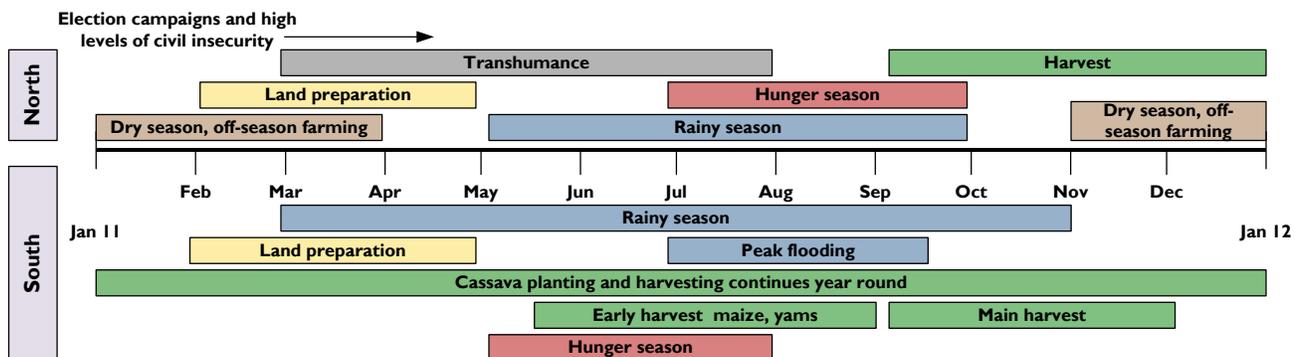
**Figure 1.** Current estimated food security conditions, April 2012



For more information on FEWS NET's Food Insecurity Severity Scale, please see: [www.fews.net/FoodInsecurityScale](http://www.fews.net/FoodInsecurityScale)

Source: FEWS NET

### Seasonal Calendar and Critical Events



Source: FEWS NET

### Most Likely Scenario (April to September 2012)

Food supply in most markets across the country is normal in April/May, and food security is stable throughout much of the North Central and Southern regions, supported by generally normal market functioning, normal flow from surplus production areas to deficit areas, and the onset of seasonal planting activities. However, localized factors in the extreme north region are compounding the effects of poor 2011 production, drought, and interruptions to normal cross-border trade activities. The greatest food insecurity concerns remain in the extreme north, across northern most parts of Borno, Yobe, Jigawa, the northeast, of Borno state through Kebbi state in the west, affecting both farming and the pastoral households, and northern most parts of Kano, Katsina, Zamfara, Sokoto and Kebbi states in the northwest. The states were affected by

the prolonged dry spells during the 2011 growing season with significant shortfalls in cereal production (primarily millet and sorghum), as well as legumes such as cowpea and groundnut, leading to reduced household food stock.

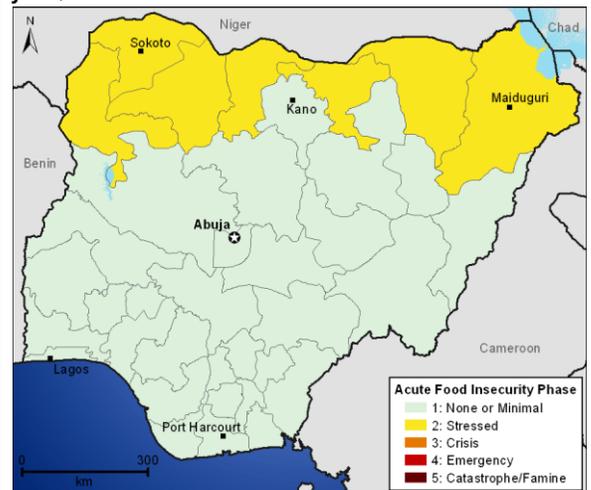
Food prices have increased significantly over the last month, largely due to low production shortages in 2011 growing season, depleting poor household food stocks, and the intensifying civil insecurity, which is limiting food flow to prone areas particularly in the northeast and Kano areas and increasing staple food prices. While some degree of price inflation is typical at the beginning of the lean season, increases this year are due to a combination of factors, including: recent large-scale procurements for regional Sahelian humanitarian programming, market systems interrupted by increased civil insecurity, supply chain anomalies such as fuel price increases and militant activity, and trader speculation or hoarding. In the last month, prices for staple foods, specifically millet, sorghum and maize have increased by 20%, 3%, and 3%, respectively with the highest price increases reported in the Dawanau market in extreme northern region.

Government trade policy and domestic deregulation efforts will impact food security during the outlook period. The Nigerian border with Niger and Chad remains closed due to a renewed government ban export of cereal grains across the borders to prevent higher food prices. While border closures will prevent future large-scale procurement of cereals from Nigeria, the GoN recently approved an external request to procure 30,000 tons of grains in April for humanitarian use in neighboring Sahelian countries. In addition to the additional speculated procurement planned by neighboring countries and persisting informal cross-border trade, price increases during the onset of the lean season in June/July will affect household food access among poor and very poor households, particularly in the extreme north region. However, the persisting border closure has also hampered unskilled labor flow into Nigeria from Niger and Chad, reducing labor supply and increasing domestic labor wages in April/May, allowing for higher income earning and stronger purchasing power among poor households.

Civil insecurity remains a driver of food insecurity in localized areas in the extreme north and south, causing displacement, loss of income, destruction of agricultural assets, and loss of food stocks. In the north, insecurity caused by Boko Haram persists in Borno, Bauchi, Kano, Kaduna, Niger and Yobe states. In the north central states of Plateau, Nasarawa, Benue and Taraba, inter-communal violence and farmer/pastoralist conflicts spur displacement and pastoralist migration to southern states in April, restricting access to the vast grazing land in the north central areas. Kidnapping and robbery in the Niger Delta region in the south have intensified, interrupting market behavior, and limiting trader activity. Insecurity in the Delta region also disrupts agricultural activities in localized areas, directly impacting livelihoods that depend on the Delta ecosystem as a food and income source.

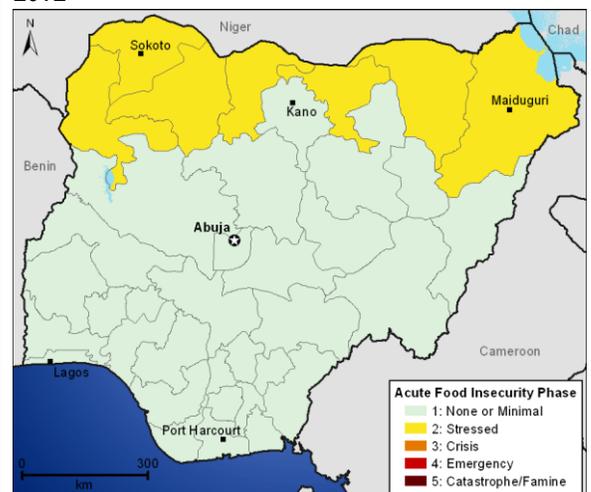
Farmers throughout the country are currently engaged in normal seasonal farming activities. In the south, ongoing agriculture activities include land preparation, planting of maize, cassava and yam along the major floodplains where the soil moisture is high. Primary planting activities are expected to begin in May when the rain has stabilized in all areas and can adequately sustain crop growth. In the north central zone, farmers are engaged in land preparation activities and procurement of inputs such as seeds and fertilizer in April/May in anticipation of the start of the growing season. Light seasonal rains were recorded in localized areas in the north central in April, but sowing of maize, sorghum and pulses will commence in May/June when the rains are

**Figure 2.** Most likely food security outcomes, April-June, 2012



Source: FEWS NET and ZVAC

**Figure 3.** Most likely food security outcomes, July-September, 2012



Source: FEWS NET and ZVAC

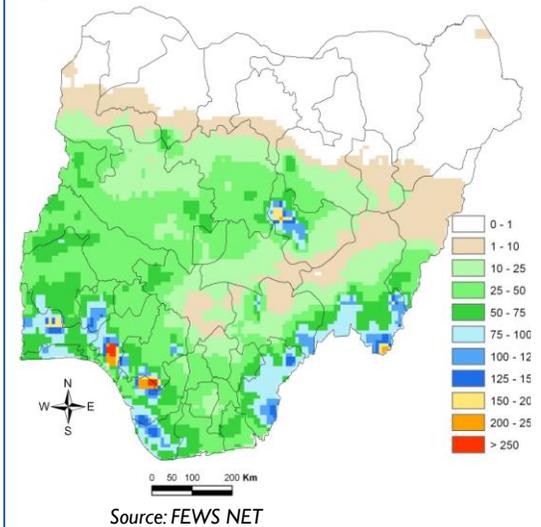
For more information on the IPC Acute Food Insecurity Reference Table, please see: [www.fews.net/FoodInsecurityScale](http://www.fews.net/FoodInsecurityScale)

fully underway. The early green harvest of vegetables and maize is ongoing, increasing food stocks and tempering food prices. In the extreme north farmers are engaged in land clearing activities and off season harvest of onion, tomatoes and vegetables along major river systems. Harvest of dry season cowpea is underway within the Lake Chad valley and has reached most markets. Procurement of inputs such as seeds and fertilizer has started and the season is expected to start normally in June/July in the extreme north. Transhumance by the pastoral household from the extreme north to the north central and the south is ongoing in April/May.

The most-likely scenario for the April to September period incorporates the following information and assumptions:

- Average rainfall beginning in May/June throughout the season across the country resulting in a good harvest.
- Pastoral resources will be normal in the north and the south from July to September as the rainy season peaks, increasing pasture availability and fishing activities.
- Cereal/livestock terms of trade will depreciate normally in May/June before the rainy season established fully, but will peak in August/September as the growing season peaks, improving livestock body condition.
- April cereal prices in the extreme northern states are 35% higher than normal and will further increase by as much as 30 to 40 percent in the event of procurement for regional humanitarian use by external actors, and procurement from neighboring countries during the outlook period pending export bans.
- The deregulation of the fuel prices as widely speculated will lead to about 35 percent increase from the current high levels of NGN97/liter across the country during May/September.
- Persisting civil insecurity caused by the Islamic sect-Boko Haram in areas prone to violence, namely Borno, Bauchi, Kano, Kaduna, Niger and Yobe states in the extreme north in April will continue to displace households, mainly in urban areas.
- Food and non food gifts during the Ramadan in July/August period will lead to more food availability and access to the poor households.
- The lean season will begin up to two months early in the extreme northern states, creating earlier dependence on market purchase during the lean period. In other areas, the lean season will be normal.
- Export ban remains in effect through the lean season, which will end as normal in September.
- Normal seasonal flooding in the north and south will cause displacement and require humanitarian and food assistance, typically provided by the GoN for up to 3-5 months. Food assistance levels may be lower than in an average year.
- Domestic markets will continue to function normally despite insecurity and sporadic disruptions to north/south supply chains, market flow of goods, and transportation networks.
- Labor demand will be higher compared to typical seasonal trends, in the months of July/September, permitting normal levels of seasonal access to food, with the exception of areas prone to violence and flooding, in the north and the coastal states.

Figure I. Total RFE, April 2012



**Most Likely Scenario for the extreme north**

Land preparation activities have started in the north in preparation for the 2012 growing season. Farmers are procuring seeds, fertilizer and other basic inputs for the planting season, and harvesting of dry season products is ongoing for tomatoes, onions and vegetables. Although light rains were recorded in some parts of the north central states, dry conditions continue throughout the extreme northern region. Most poor households in the north central and the extreme north regions depend on their own food stocks and are less market dependent between April/June. They also depend on the above average dry season harvest which peaks in March especially for maize, rice and vegetables within the floodplains. The increased income derived from the sale of the dry season products are used in accessing food by the poor farming households, who also sell small ruminants to earn income and access food. Household food stocks deplete seasonally during the normal July-September lean season, as most households will resort to market for their food at normally high prices as demand increases. Poor households during this period will also supplement food needs through income earning activities such as agricultural labor, weeding and unskilled labor. During the lean season, others will depend on debt from relations and the rich to access food before the harvest in October.

Currently, abnormally high cereal prices are negatively impacting household purchasing power, creating access constraints for basic food needs in the extreme north. Market prices for most cereal crops are increasing in markets monitored by FEWS NET, including: Dawanau market (Kano state), Dandume market (Katsina state), and Kaura market (Zamfara state). Price increases are partly due to 2011 production shortfalls, which have decreased supply of locally produced food. In Dawanau market, maize, sorghum and millet wholesale prices have continued to increase relative to last year, ranging from 27% for sorghum, and 15% for maize in mid April relative to April 2011. Millet, the major staple food for the poor in the extreme north, has increased by about 35% above last year's price at the same time. The 2012 cereal prices are also above the five-year average by about 47 percent. High food prices can be partly tempered by the above average off-season production of dry season goods (onions, tomatoes and pepper) in the area, providing an important income source for poor households in April/May. Dry season cowpea from Lake Chad basin, in Borno state has also arrived in markets, adding another affordable food source for local purchase and consumption.

Cereal food prices will increase further due to early depletion of household food stocks, compounded by the impending lean season in July through September and persisting civil conflict which interrupts market flow of food commodities to affected areas, increasing demand. The likely deregulation of the fuel price will further increase transportation costs and food prices through September. Speculators are withholding their stocks in anticipation of increased food prices during the lean season, resulting in lower supply and higher demand. Cereal food supply in markets may also increase in July/August during the fasting period when Muslims proceeding on usual rites to Saudi Arabia during the fasting period will release their stocks, impacting food prices and increasing food access by poor households.

Traders in Dutse-Jigawa state reported that most poor households have exhausted their food stocks and are resorting to market purchase as early as mid April, instead of in June/July as normal. Similar conditions are present in most areas of the extreme north due to the 2011 production shortfall, persisting civil insecurity, low labor demand, suggesting that the lean season, which normally starts in July will start early in April/May, will be extended for poor and very poor households. The government will provide food at subsidized rates in markets beginning in May and continuing through September as part of a normal seasonal assistance strategy. Food and non food gifts at government feeding centers and from wealthy households to the poor during the month-long Muslim fasting period in July/August will also allow increased food access during the lean period.

Through the lean season, poor households affected by 2011 production shortfalls will earn income to replenish food stocks through increased migration, increase the sale of small ruminants such as goat and sheep, and partake in other income earning activities such as intense casual labor work for land preparation activities, abnormal migration and petty trading to meet their basic food and non food needs between April and June. During July/September the poor households will engage in fertilizer application and weeding. Labor opportunities and wage levels are expected to be normal in the extreme north through the outlook period, with the exception of areas affected by persistent and disruptive violence and insecurity, especially in Borno, Yobe and Jigawa states.

Seasonal localized flooding in July/September will displace poor households along floodplains of Hadejia-Jama're River basin, Lake Chad basin and Sokoto-Rima River basin for up to five months. During displacement, these households will move to shelters and will be largely dependent on limited and short term food and other humanitarian assistance from government through NEMA, SEMA and NGOs through September. Household are likely to resume normal livelihoods patterns as late as November/December, after the main harvest when food is readily available at lower prices and water has receded, and fishing and dry season activities peak.

Fuel prices may be abnormally high in the extreme north which normally depends on informal fuel access, increasing transportation cost, limiting food flow and leading to high food prices and reduced access by poor households in the area. Urban poor households will face increased expenditure on energy and transportation costs and reduce food expenditures to meet increasing price levels, and will resort to less preferred foods such as cocoyam and sweet potatoes during May/September period.

Inadequate access to pastoral resources, coupled with high cost of livestock maintenance, will require pastoralists to migrate to better pastoral areas in the north central in April/May. However, recent upsurges in inter-communal violence is hampering access to the vast pastoral resources in the north central states to pastoralists from the extreme north,

therefore, pastoralists are migrating to southern states. The long travel distance may lead to early deterioration of animal body conditions and livestock values, as well as declining terms of trade a month earlier than normal in April/May instead of May/June.

The usual government food and non food assistance to the vulnerable populations may be more coordinated and targeted this year relative to previous two years, as government becomes more alert due to the Sahelian food crises, increasing food availability and access to the poor households during high food prices through September.

Household level food security in all states will improve as the growing season peaks. At least 80% of households in most areas are able to meet their basic food needs through the outlook period through intensified coping mechanisms. However, isolated pockets of acute insecurity, especially across the extreme north, but particularly in northernmost Borno, Yobe, and Jigawa states in the northeast, will show IPC Phase 2 outcomes through July, given household inability to meet basic household food needs due to any combination of reduced food stocks, localized violence and market disruptions/price increases, and seasonal flooding. Monitoring of market trends, food prices, food availability in the market, and trader behavior, as well as the regional Sahel food crisis is critical for early warning in the extreme north, where current levels of food security remain highly vulnerable to a number of localized factors. Projected food security outcomes in the extreme north through September are based on the following assumptions:

- The seasonal forecast for Nigeria indicates that the 2012 growing season will start normally in the extreme north in June in Sokoto, Kebbi, Zamfara, Jigawa, Yobe and Borno states with slight likelihood of dry spells.
- Areas along major river catchment such as the Hadejia valley, Lake Chad basin, and the Sokoto-Rima basins will likely experience localized, normal flooding during peak periods in July/September, displacing households along the floodplains.
- Household access to cash will improve substantially as agricultural related income earning opportunities intensify due to high water resources and market related employment and high livestock prices as the season progresses favorably between July/September.
- Livestock prices are within normal levels in April, and cereal prices are high, cereal/livestock terms of trade are unfavorable to the pastoralists as supply from Niger and Chad are limited, and will fall to typical levels in May/June before the rainy season is fully underway, further eroding terms of trade for pastoralists.
- The rains will deteriorate seasonal roads due to detours, resulting in increased transportation costs during peak period in July-September, limiting food supply to affected areas, and increased food prices.
- Cereal food prices such as millet, sorghum, maize and cowpea will rise significantly, peaking in August during the lean season in July/September period.
- Government will release grains from the strategic reserves to sale at subsidized rates between May/June, instead of July/August, to offset increasing food prices.
- The persisting civil insecurity caused by the Islamist insurgents-Boko Haram will ease between May/June as the government intensifies security surveillance to curb the menace, improving food flows to affected areas.
- As the 30 days Ramadan fasting season begins in mid July, prices of major staples such as millet, maize, fruits, and vegetables will increase significantly beginning in late June.

### The South

The 2012 rainy season began on time in February. Farmers are engaged in normal farming activities for this time of the season, including-land preparation, and planting of maize, cassava and yam along the major floodplains where the soil moisture is high. The major planting activity is expected in May when the rain has stabilized in all areas and can adequately sustain crop growth. NIMET and ECMWF have predicted average rainfall between May and September, with normal likelihood of short dry spells (August break in rains) during the 2012 growing season.

The price of gari (the primary staple food), yam and maize, the major staple food in the south are relatively high compared to last year and previous two months. The onset of the season in the south has contributed to low gari supply on most markets as the soil moisture content increases, damaging the cassava tubers causing it to sprout, reducing the quality and quantity of gari (processed cassava). Due to low household and market food stocks, prices of cereals, gari and yam in most markets are relatively higher compared to previous months and last year. The market supply of imported food such as rice is average on Bodija and Lagos markets, as monitored in mid April. Other food substitutes for gari, such as cocoyam, sweet

potatoes, bitter yam and mango are widely available and accessible to the poor at this time of the year. Local labor demand is high due to reduced inflows of northern workers, creating higher wages and more casual labor opportunities in during April and May. On farm income activities such as planting, weeding and fertilizer application will peak between May/July. The early green harvest of yam and maize will peak in June, increasing food access by poor and very poor households through September, tempering the high food prices during the lean season. However, the poor households, especially those who lost their assets to flooding/violence in the Niger Delta area, will resort to intense labor work, indebtedness and remittances from relations to access food.

Poor households will meet their income and food needs through intense labor work, migration to urban areas, indebtedness and remittances to access food. With the exception of localized flooding zones, over 80% of the population in the region will be able to meet their basic food needs and will be food secure through September.

**Table I.** Possible events over the next six months that could change the most likely food security scenario

Area	Event	Impacts on food security outcomes
<b>North</b>	<p>Cross border trade with Niger and Chad resumes during May/June as government opened the borders.</p> <p>The present forecast by major meteorological agencies for normal rain in the extreme north may not hold and dry conditions will persist in the extreme northeast, leading to significant cereal production shortages.</p> <p>Significant population from Niger and Chad migrating to major cities in the extreme as the food crisis intensify.</p>	<p>Food prices will increase abnormally during the lean season in the extreme north, limiting food access. Trade activities will peak and trade related employment opportunities will increase leading to high income and improved purchasing power to access more food. Pastoralist will export more livestock and increased income and food access.</p> <p>Poor farming households' own stocks will be limited, exposing them to increased vulnerability and malnourishment especially for children under age 5 years.</p> <p>Increased labor competition in Nigeria, reduced labor wages and income.</p>
<b>South</b>	<p>Strike by the national labor organization against the proposed deregulation of the downstream sector of the petroleum industry.</p>	<p>The expected revenue accruing from the deregulation process is not forthcoming, reduced revenue to government. Implementation of food security related projects will be delayed or postponed, reducing food production activities, leading to low output and declining food access by poor households</p>