Despite the harvest in September, the food security Emergency is expected to persist in the Northeast

KEY MESSAGES

- High levels of conflict across the Northeast is driving limited engagement in agricultural activities, declines in humanitarian access, and displacement, with many populations being displaced multiple times. This, coupled with the significantly above-average staple food prices, constrains household purchasing power and food access. As a result, Crisis (IPC Phase 3) and Emergency (IPC Phase 4) outcomes are widespread across much of the Northeast. The harvest is expected to somewhat improve outcomes in areas of the region for a short period of time; however, Emergency (IPC Phase 4) outcomes are expected to persist throughout the scenario period in hard-to-reach areas.

- A risk of Famine (IPC Phase 5) persists in hard-to-reach areas of the Northeast. While it is not FEWS NET’s most likely scenario, Famine could occur in a worst-case scenario if there is a dramatic upick or shift in conflict that limits access to typical food and income sources and humanitarian assistance for a prolonged period. As humanitarian access has declined in recent months with increased conflict and continued displacement, many households in hard-to-reach areas are experiencing large food consumption gaps indicative of high levels of acute malnutrition and excess mortality. As these populations face severe difficulty meeting their food needs and are only expected to engage in the ongoing agricultural season at minimal levels, the Risk of Famine persists through at least January 2022.

- Considering the available evidence, it is likely a notable population in areas of the Northwest affected by conflict are in Emergency (IPC Phase 4) and Catastrophe (IPC Phase 5). These areas are of increasing concern as conflict is disrupting household engagement in typical livelihood activities and high levels of displacement. According to IOM, over 690,000 people have been displaced in the Northwest and North-Central areas of the country. Few humanitarian actors are operating in this area to provide needed assistance for those facing food consumption deficits. Additionally, due to the high levels of displacement and continued disruption in livelihood activities, it is expected that the harvest will be significantly impacted for many households, limiting typical seasonal improvements.

- The 2021 agricultural season is underway across the country. Farmers are engaged in land preparation and planting in the northern areas and weeding in central and southern areas. However, high input costs for items such as improved seeds, herbicides, and fertilizers coupled with insecurity are constraining the level of crop cultivation, which to date is below average. Households engaged in agriculture-based labor earn below-average wages due to increased competition from the oversupply of labor, constraining income earned. For market-dependent households, this is constraining access to food and non-food items.
Risk of Famine persists in hard-to-reach areas amid high levels of conflict

In a credible worst-case scenario in which households are cut off from humanitarian food assistance and typical food and income sources for a prolonged period, Famine (IPC Phase 5) could occur in Nigeria. While the conflict in the Northeast has persisted for over 20 years since 2009, conflict in the first half of 2021 is higher than in recent years (Figure 1). This has led to further displacement, and IOM now estimates that over 2.1 million people are displaced in the Northeast as of February 2021. The high levels of conflict have led to declines in humanitarian access in some areas and the repeated displacement of some households. In 2016, a sudden uptick in conflict resulted in the destruction of typical livelihoods and significantly disrupted household access to food and assistance delivery. During this time, households experienced severe acute food insecurity leading to excess mortality from hunger. In 2021, while conflict is at high levels, most conflict events are characterized by attacks that do not restrict household movement and humanitarian assistance for a significant length of time. For affected households, the impact on food security is severe; however, these households are presumed to have some level of food access mainly through wild food collection and own production.

Nonetheless, conflict and its impacts on livelihoods drive poor food security outcomes, notably in hard-to-reach areas. In Dikwa, Marte, Mobbar, and Kaga LGAs between March and April, around 50,000 people were displaced multiple times, and attacks in Geidam and Yunusari LGAs in April and May resulted in the displacement of another 180,000 people. Furthermore, persistent attacks in some areas, notably Dikwa and Damasak, resulted in the suspension of some humanitarian operations since mid-April. Some assistance continues through local field staff in most areas, though at low levels. Most households are currently market-dependent; however, effective demand is low as household income is limited, market functioning is low, and poor macroeconomic conditions are driving extremely high food prices. While the agricultural season has started, conflict, crop growing restrictions, and poor access to inputs are driving low engagement in agricultural labor and planting. In the coming months, while the harvest in October will likely mitigate some food consumption deficits, it is only anticipated to mitigate deficits for a short period. This ground information and available data on outcomes suggest Emergency (IPC Phase 4) outcomes are likely, with some households likely in Catastrophe (IPC Phase 5), and these severe outcomes are likely to persist through at least January 2022.

While it is not FEWS NET’s most likely scenario, if households were to be cut off from typical food and income sources and humanitarian assistance for a prolonged period, food security conditions could rapidly deteriorate. In this scenario, households would likely predominately rely on wild foods and bartering to access food. In many areas, households have already been displaced multiple times and have limited coping capacity. Some of the areas of highest concern include Abadam, Dikwa, Gwoza, Damboa, Bama, Magumeri, Guzamala, Kukawa, Mafa, and Marte LGAs, where the population facing Emergency (IPC Phase 4) is expected to be relatively high. Should households face a more prolonged and significant disruption to food and income sources – which is not the most likely scenario but for which there remains a plausible risk - Famine (IPC Phase 5) could occur.

Figure 1. Conflict events and fatalities in Borno, Adamawa, and Yobe States from June 2015 to June 2021

Source: ACLED data
NATIONAL OVERVIEW

Current Situation

The combined impact of the continued poor macroeconomic performance and widespread and high levels of conflict in southern, northwestern, and northeastern parts of the country are the primary drivers of food insecurity, resulting in atypically high assistance needs as the lean season begins. This is further compounded by the indirect impacts of the COVID-19 pandemic on income-earning opportunities.

Due to some gains in the non-oil sector, notably increased earnings in the agricultural, mining, and service sectors, the Nigerian macroeconomy has shown some signs of improvement with a slightly positive GDP and decline in the annual inflation rate. The Gross Domestic Product (GDP) grew by 0.51 percent year-on-year in real terms in the first quarter of 2021, marking two quarters of consecutive growth following the negative growth rates recorded in the second and third quarters of 2020. The annual inflation rate declined moderately to 17.93 percent in May from 18.12 percent in April, following nineteen months of persistent increases (Figure 2). Despite the improvements in the macroeconomy, according to the World Bank, high inflation rates, rising staple prices, and increasing unemployment have pushed over 7.0 million more Nigerians below the poverty line in 2020.

Despite the gains in the macroeconomy in recent months, as they are not primarily driven by improvements in the oil sector, external reserves continue to decline. In the first quarter of 2021, daily oil production was on average 1.72 million barrels per day, slightly lower than at the same time last year; however, higher than Quarter four of 2020. Crude oil prices are gradually increasing as the global economy rebounds, with June prices about 75 USD/barrel on the international market. The external reserves declined from $34.23 billion as of May 31 to $33.85 billion on June 15 as daily oil production remains low and does not offset the increases observed in crude oil prices.

The Central Bank of Nigeria recently signaled a shift towards the government instituting a single exchange rate policy and floating the currency by no longer indicating a fixed value of the NGN. Despite this, as of mid-June, the official rate is currently exchanging at 410 NGN/USD and exchanging at 500 NGN/USD on the parallel market. In recent months, the parallel and official exchange rates have depreciated by about three percent. The parallel market rate also depreciated by about one percent, with the official and parallel market rates narrowing relative to the previous month. Additionally, domestic petrol prices remain elevated, pushing up transportation costs. These economic factors are putting pressure on staple food prices across the country, particularly in deficit-producing areas.

According to the Ministry of Health, as of June 30, 167,618 confirmed COVID-19 cases and 2120 associated deaths were reported with a case fatality rate of about 1.3 percent. As of June 30, over 3.5 million people have received at least one dose of the COVID-19 vaccine. Despite vaccinations ongoing, community infections are still ongoing. While most restriction measures put in place to curb the spread of COVID-19 in 2020 have been eased, some measures continue, such as social
distancing, public gatherings no larger than 50 persons outside of the workplace, and continued curfews between 12 to 4 am. These measures are having limited impacts on poor household’s typical income-earning activities.

Trade over land borders has improved as borders have opened and restriction measures have eased. Household and cross-border demand are currently higher than normal due to the below-average 2020/21 harvest and re-opening of the land borders. The re-opening of the land borders has led to an increased level of informal trade, mainly due to the low value of the NGN. Similarly, the impending Tabaski with increased livestock demand from neighboring countries have also increased trade flow.

Informal trade activities in the Lake Chad region are gradually resuming; however, overall trade continues to be lower than typical and volatile due to ongoing conflict. According to IOM and WHO, in late May/early June, there was a slight increase in cross-border movement between the Far North of Cameroon and Borno State in Nigeria. These movements are related to seasonality, short-term local movement, family visit, and economic migration in both directions.

On top of this, domestic trade has returned to near-normal levels; however, it remains below normal to limited in areas affected by conflict. Most monitored markets remain disrupted in the Northeast as the conflict persists (Figure 3). The recent conflict in areas of the region somewhat disrupted market activities in east-central and northern Borno state. Similarly, trade routes along Damaturu-Maiduguri and Konduga to Bama continue to deteriorate as the insurgents intensify attacks. The security checkpoints along the road lead to delayed delivery, and high informal tax further increases transaction costs. Similarly, traders also evade some routes due to incessant attacks, reducing market supplies in affected areas. This is exacerbated by high household demand in the area. However, markets in Adamawa state remain functional in most areas with improvement in Gombi market due to the subsiding security situation.

Prices for both staple and cash crops remain significantly above the five-year average and last year due to the poor macroeconomic conditions, high fuel prices and transportation costs, and high market demand due to the below-average 2020 harvest. Traders are putting further pressure on parts as the poor start to the rainy season has resulted in market speculation, and traders and households are withholding stocks. As a result, market supply across much of the country is lower than average. Although the dry season harvest of rice and maize starting in April/May has resulted in some improvements in the market supply of these commodities. As a result, staple prices remain elevated relative to other neighboring markets less prone to conflict (Figure 4). In June, millet, the staple food in Maiduguri, prices were about 31 percent above average, while maize was about 80 percent in Dawanau market relative to the average.

The dry season harvest has concluded in most areas and has generally been below average due to high levels of conflict in irrigation/fadama areas, constraining land access.
The rainy season started normally in March in bimodal areas and in central and northern areas in May and June, respectively. Although, rainfall has been erratic, notably in central and bimodal areas where rainfall is slightly below average. Additionally, cumulative rainfall for May 1 to June 30 in much of the northern areas of the country is below average, with the largest rainfall deficits in north-central areas.

According to the Nigeria Hydrological Services Agency (NIHSA), 121 LGAs in 28 States and FCT-Abuja fall within the highly probable flood risk areas for the 2021 season, while 302 LGAs in 35 states fall within the moderately probable flood risk areas (Figure 5).

Planting and weeding are underway in the bimodal areas, while farmers engage in planting and land preparation activities in northern areas. According to the Water Requirement Satisfaction Index, in late June, in some of the extreme northern areas of the country, the season is yet to start. Overall, engagement in agricultural activities across the country is below average, driven by conflict and lower than normal access to agricultural inputs. High input costs, including fertilizer and seeds coupled with below-average households purchasing power, drive below-average access to inputs. In conflict-affected areas, notably in the Northeast, many households are unable to engage in the ongoing season due to fear of attacks, limited capacity to access inputs, and access land. Moreover, in the Northeast, restrictions continue to grow crops below a certain height due to security concerns. In areas where crops have been planted, according to key informants and WRSI conditions are broadly favorable.

Through the ministry of agriculture, the Borno state government is supporting farmers by establishing a farming program in selected LGAs across the state. The program is to utilize 20,000 hectares of land for some key crops, including rice, maize, groundnuts, and cowpea. So far, Dikwa, Gubio, and Askira Uba LGAs are targeted for rice, groundnut, and maize cultivation, respectively. Land clearing is underway in some of these locations. Similarly, inputs such as seeds and fertilizer will be provided to farmers, including equipment for land preparation. Thereafter, the participating farmers are entitled to 70 percent of the total harvest at the end of the season. Humanitarian actors in the Northeast are providing improved seeds to nearly 190,000 displaced households in Borno, Adamawa, and Yobe states with access to land. Planting is ongoing with these crops across the affected LGAs and for all the respective crops.

As the rainy season started erratically and poor in northern areas, vegetation and pasture availability is lower than usual; however, available resources are sufficient for livestock needs (Figure 6). Livestock movement from the southern to central areas as households return to their homesteads in the northern areas is underway. This is slightly delayed due to the erratic and poor start of the rainy season in northern areas and conflict. Cattle rustling activities persist in the northern and central states, further restricting livestock movement to some conflict-prone areas. As a result, access to pasture is somewhat limited; however, there are no reports of significant impact on livestock conditions. Livestock body conditions are generally favorable, and prices remain atypically high across the country. Livestock herd sizes remain below average mainly due to the cattle rustling activities, coupled with anti-open grazing policy in some states.

Income-earning opportunities and wages are below average for most poor households across the country and even more restricted in conflict-prone areas. This is due to the poor macroeconomic conditions and the high levels of conflict across the country, resulting in stiff competition for labor in most areas. The high competition for labor income has also resulted in lower than typical wage rates due to the high labor supply in many areas. Furthermore, income from agricultural labor is lower than usual, with most poor households engaged in labor work to earn some income. Income from agricultural labor in conflict-affected areas, notably the Northeast, is minimal. Households also engage in other unskilled labor such as petty trading, water vending, and firewood sales to earn some income. In urban areas mainly, poor households engage in construction labor, petty trading, and motorcycle taxi driving. Labor migration is constrained due to the escalating conflict that is limiting population...
movements in the country. At the same time, remittances are impacted by increasing unemployment rates, the low value of the NGN, and reduced purchasing power. Pastoralists are selling less livestock than typical, as livestock prices remain above average while still earning near-normal income as the terms of trade continue to be favorable.

On top of the poor macroeconomic conditions, conflict has become more widespread across the country and at higher levels in areas in 2021 than in recent years (Figure 7). In the Northwest, cattle rustling, banditry, and kidnapping continue at very high levels. Since December 2020, over 930 students have been abducted in Niger, Katsina, Sokoto, Kaduna, Plateau, and Zamfara states. These incidents have been attributed to armed bandits and kidnappers operating in the Northwest and extending to parts of Niger State. The bandits receive ransom for the release of those abducted, and the financial motivation provides incentives to continue abductions. Zamfara, Sokoto, and Kaduna States are among the worst affected. According to IOM, as of late February, conflict in the Northwest and northcentral states displaced nearly 700,000 people, with over 15,000 displaced in Kebbi State alone in mid-June. The actual scale displaced population is likely even higher than reported as some areas of the Northwest are inaccessible, and conflict continues to drive displacement.

In the southern areas, kidnapping and secessionists agitation has increased with the Eastern Security Network (ESN/ESF), formed in late 2020, as the armed wing of the terrorist-designated Indigenous People of Biafra (IPOB) separatist group has increasingly attacked and killed security forces. The ESN has increasingly mobilized against open grazing for livestock while threatening state governments with sustained violence should they not enforce laws regulating pastoralism within the region. In response, the police announced Operation Restore Peace to curtail ESN and IPOB. Some pastoralists were attacked, resulting in the loss of livestock assets. Similarly, some farming communities were also displaced due to fear of reprisal attacks by the pastoralists. The pastoralists also destroyed some farmlands.

Borno state remains the epicenter of violence in the Northeast, with attacks by Boko Haram factions and the Islamic State West Africa Province (ISWAP) causing more fatalities in the first five months of 2021 than the same period in 2020. Insurgents continue to target security installations and humanitarian agencies; garrison towns, many of which have suffered repeated assaults since the start of the year as militants sought out resources and weaponry, which prompted humanitarian organizations to suspend operations in the area. Conflict across the region has been concentrated in towns, such as Dikwa, Damasak, Marte, Kaga, Damboa, Kala Balge, Konduga, Geidam, and Madagali, as the security situation continues to deteriorate. This conflict has led to increased displacement and households being displaced multiple times and declines in humanitarian access, particularly in Bama, Damboa, Dikwa, and Kaga LGAs in Borno state and Gujba LGA in Yobe state, and persistent restricted engagement in livelihood and income-earning activities. Additionally, attacks by bandits, kidnappers, and farmer/herder conflict continue in Taraba, Adamawa, Yobe, Bauchi, and Gombe states.

According to UNOCHA, there are at least one million individuals in hard-to-reach areas in the Northeast as of March. According to IOM, as of May, over 2.1 million people are displaced across the six northeast states, increasing about two percent since December 2020. Many of these households are dependent on limited support from the community and markets to access food. Similarly, communal conflict is further limiting market and food access in localized areas.
The Borno state government is encouraging the return of IDPs to their homesteads and some refugees from Cameroon and Niger. In preparation, the government constructed structures to accommodate about 1,500 households relocated from two IDP camps in Maiduguri to Auno in Konduga LGA. These IDP camps are now closed in Maiduguri. According to UNHCR, as of early June, there are nearly 67,000 registered Cameroonian refugees in Nigeria. Most of these refugees are in Cross River and Taraba states, while others are in Benue and Akwa Ibom states. About 42 percent are in camps, while 58 percent are in host communities. Most Cameroonian refugees have access to food and non-food assistance from humanitarian actors. Some of them also benefit from community support in areas where they are living. The government also provides land to support crop cultivation and a starter pack, including fertilizer and improved seeds to enhance crop cultivation, mainly vegetables.

In April, humanitarian actors provided food assistance to over 1.8 million people in Borno, Adamawa, and Yobe States, of which about 1.7 million beneficiaries are in Borno State. The total food assistance for the three northeast states in April is higher by 23 and 12 percent relative to the same time last year and the previous month, respectively (Figure 8). Humanitarian actors remain targets of attacks by the insurgents, constraining distribution to some high-risk areas, where needs are often most acute. Recent attacks in Dikwa, Marte, Damasak, and localized parts of a couple other LGAs in Borno and Yobe States led to the disruption of humanitarian assistance delivery.

The National Emergency Management Agency (NEMA) distributed assistance to nearly 25,000 displaced households in 14 LGAs of Niger State in May 2021. Each household received 10 kgs of rice and beans, 500kg of vegetable oil and salt, and some seasonings. The LGAs that received assistance included Rafi, Shiroro, Bosso, Munya, Paikoro, Mariga, Kontagora, Magama, Mashegu, Wushishi, Rijau, Borgu, Lapai, and Lavun Local Government Areas.

Most households in non-affected conflict areas continue to consume own food from stocks or are market dependent; however, earning sufficient income to meet their food and non-food needs. As a result, these areas are facing Minimal (IPC Phase 1). Although with the increase in conflict, leading to the disruption in livelihood activities coupled with the poor macroeconomic conditions, driving high food prices, many households are unable to meet their non-food needs. As a result, many areas are facing Stressed (IPC Phase 2) towards the lean season.
In the Northeast, displaced households in displacement camps are predominately reliant on humanitarian assistance to meet their food needs with Stressed! (IPC Phase 2!) outcomes ongoing. Households in garrison towns have limited assistance and mainly depend on their own limited harvest and market purchases, with below-average purchasing power, and are likely facing Crisis (IPC Phase 3) outcomes. Most of these displaced persons are depending on community support and the market to access limited quantities of food. They mainly stay in host communities and engage in menial labor work, petty trade, and accrue debt to access food. Some areas of central Borno State are facing Stressed (IPC Phase 2) outcomes due to the proximity and access to Maiduguri, where households have better access to income to purchase food. In southern areas of Borno State that are less impacted by conflict, households engage in near-normal levels of income-earning activities and with most areas facing Stressed (IPC Phase 2).

Insurgents continue to target security installations and humanitarian agencies; garrison towns which suffered repeated assaults since the start of the year as militants sought out resources and weaponry, which prompted humanitarian organizations to suspend operations in the area. Households in these areas affected by conflict engage in limited income-earning activities and are mainly dependent on humanitarian food assistance. As a result, most parts of Borno and Yobe States, Crisis (IPC Phase 3) outcomes are ongoing. However, it should be noted that it is expected that some households are in Emergency (IPC Phase 4) and Catastrophe (IPC Phase 5) in these areas (Figure 9).

In hard-to-reach areas, households are predominately reliant on markets for food with constrained income and wild foods. Most households rely on bartering for food access, but this remains significantly below average. Consequently, wide food consumption gaps and high levels of malnutrition are likely ongoing. As a result, Emergency (IPC Phase 4) outcomes are ongoing, with some of the population likely experiencing Catastrophe (IPC Phase 5).

Conflict-affected and displaced households in the rest of the country are increasing in these areas and are engaged in increased labor work to access limited income. Some of the displaced households could not cultivate during the previous season and mainly depend on limited community assistance and the market for food. They also have limited income and are difficulty purchasing food due to the atypically elevated staple food prices. These households are in Crisis (IPC Phase 3) outcomes, particularly in parts of Katsina, Sokoto, and Zamfara states. It is expected that the worst conflict-affected households in some LGAs face Emergency (IPC Phase 4) or Catastrophe (IPC Phase 5). Some of these households, particularly in the northcentral and southern areas affected by the persisting and recent conflict, remain displaced. In contrast, some households only have some constraints on their normal livelihood activities and can meet their food needs and are in Stressed (IPC Phase 2).

Assumptions

The most likely scenario for June 2021 to January 2022 is based on the following national-level assumptions:

- The COVID-19 pandemic is expected to continue through the projection period due to the expectation of continued low vaccination rates. The access to COVID-19 vaccines is expected to increase through the end of 2021 and would further encourage relaxation on curfews and restrictions, likely leading to some improvement in economic activities.
- Following the slow exit from the recession with recorded growth from the non-oil sector, macroeconomic conditions are expected to improve in late 2021; however, they are expected to remain generally poor. The annual inflation rate is expected to remain in the double digits with continued inflationary pressure and as foreign exchange challenges are expected to persist. The World Bank indicates that the GDP growth in Nigeria is expected to resume at 1.8 percent in 2021 and edge up to 2.1 percent next year, assuming higher oil prices, structural oil sector reforms, and market-based flexible exchange rate management.
- Petrol pump prices across the country will likely increase quarterly as the government is expected to remove fuel subsidies and deregulate the petroleum sub-sector. Thus, transportation costs will also increase, leading to higher transaction costs and increasing staple prices and peaking during the lean season.
• The increasing trend of crude oil production will likely continue due to improvements in the global economy, which would see relaxation in COVID-19 containment measures globally, increasing industrial activities and transportation. As a result, earnings from crude oil are expected to improve, though slightly.

• June to September rainfall is expected to be below-average rainfall in South and Central states, while above-average rainfall is expected in the northern part of the country.

• Some coastal States, including Delta, Lagos, and Bayelsa, are expected to experience coastal flooding due to rise in sea level and tidal surge, which could impact fishing, habitation, and coastal transportation. The average level of flooding is expected in the Niger river. In contrast, average to below-average levels of flooding are expected in Kaduna and Benue rivers and at the confluence of Niger and Benue rivers in Lokoja, Kogi State.

• The main harvest will likely begin normally in September with the early maturing millet, maize, and yams; however, a below-average national harvest is expected. This is due to the expectation for continued high levels of conflict, limited access to inputs, and the below-average rainfall performance expected in the south and central states. Worst conflict-affected areas are expected to have limited to no production.

• A slow improvement in cross-border trade activities, both formal and informal, is expected following the re-opening of most international land borders in December 2020. However, due to continued poor macroeconomic conditions and conflict, trade flows to and from Sahelian countries are expected to remain below average.

• Prices of locally produced staple foods are expected to remain well above average across the country through January 2022 and even higher in areas affected by conflict, given below-average food production and increased transportation costs (Figure 10). Government stocks are at the lowest level across the country compared to last year and average. The government will most likely seek to replenish these stocks, significantly increasing demand and contributing to the high prices.

• Pastoral resources are expected to generally remain available across most of the country during the scenario period; however, pasture availability will likely be slightly constrained in the north towards the end of 2021, following the departure of rains. Moreover, pastoral resources will be below average in areas with erratic rainfall and prolonged dry spells, mainly where rainfall is below average.

• Livestock movement across the country will generally be below average as the conflict, kidnapping, and cattle rustling activities persist. Those who cannot migrate to usual locations are expected to move to atypical grazing areas, with marginal impact on livestock body condition. Similarly, 17 southern states announced a ban on open grazing, including cattle movement to the south by foot; this further limits livestock movement to the south. Pastoralists will have limited access to some vast grazing land in the central and southern parts of the country from December due to escalating farmer/pastoralist conflict, cattle rustling, and kidnapping. This will likely lead to reduced pastoralism and moving towards a sedentary system of livestock production.

• Livestock body conditions will most likely remain favorable for most pastoralists across the country. Access to pasture and water points are expected to be limited in inaccessible and conflict-prone areas of the country following fear of attack.

• An increase in livestock prices is expected in July, when pastoral conditions are anticipated to be favorable. Livestock flows from neighboring Cameroon and Chad are expected to decrease through January 2022 and would remain below average following trade disruptions, the resurgence of attacks/insecurity, and the depreciating value of the NGN. Trade activities with neighboring countries are mainly informal; the re-opening of the land border with Niger will lead to a slight increase in livestock flows into Nigeria. Livestock supplies on the market are expected to be limited, driving above-average prices throughout the scenario period.
• Main season cultivation in areas less affected by conflict is anticipated to be near normal. An atypical increase in labor supply is expected through the harvest in September/October, given reduced access to income for most poor households. However, wages will likely remain below average due to the above-average labor supply and high competition. Other households will engage in petty trading, construction labor, and other unskilled labor to earn income, although likely below-average due to competition and below-average demand as purchasing power remains low. Urban poor households will also earn below-average income as the pandemic persists. Similarly, conflict-affected households are likely to have constrained income opportunities for both agricultural and non-agricultural activities as conflict continues to restrict activities within the region.

• Other income-generating options, including self-employment and casual labor, would remain constrained throughout the outlook period due to conflict and poor macroeconomic conditions driving low demand and below-average wages.

• Remittances are expected to increase marginally but will remain below average through January 2022 due to poor macroeconomic conditions and the indirect impacts of the COVID-19 pandemic constraining income.

• Humanitarian actors will continue to provide food assistance to vulnerable households in conflict-affected areas of northern Nigeria. However, limited assistance is expected in some areas, including Monguno, Marte, Mobbar, Dikwa, Gubio, and Monguno, following the temporary exit of some humanitarian actors.

• Conflict associated with insurgents, banditry, and herder/farmer clashes are expected to decline with the onset of the rainy season in June/July 2021 as roads become increasingly impassable, and pasture availability expands. Kidnapping, predominately of schoolchildren, will most likely decrease as schools are out of session starting in July, despite the payment of ransoms making this increasingly profitable for criminal and militant kidnappers. Violence is expected to resume in November with the end of the rainy season.

• It is expected that Eastern Security Network attacks on security forces and other nationals will continue to increase and be driven by the government relocating federal troops from the Northeast to the Southeast to counter increased secessionist activities in the region. This is likely to result in increased civilian casualties and retaliatory attacks.

• Legislative measures undertaken to address the grievances of Igbo nationalists – specifically a ban on open grazing – are likely to inflame ethnoreligious tensions and increase acts of intercommunal violence in southern Nigeria. Violence is likely to manifest in increased demonstrations in urban southern cities such as Port Harcourt, Aba, Owerri, Onitsha, and Enugu.

**Most Likely Food Security Outcomes**

Households in areas less impacted by the escalating conflict across the country will engage in normal livelihoods activities and earning normal income, while others will continue to consume own production. Others will engage in land preparation, weeding, and planting to earn normal income and access food. As a result, Minimal (IPC Phase 1) outcomes are expected to be present. The deteriorating security situation across the country will further limit income-earning opportunities for most poor households and further constraining purchasing power and food access during the lean season. Moreover, poor urban households that are mainly market-dependent are expected to have low purchasing power. Similarly, households along major floodplains and those planting along the floodplains will experience some flooding, driving some displacement and destruction of farmlands during the peak flooding period between July and September. The conditions are further exacerbated by the impacts of escalating conflict, flooding, lower purchasing power, and atypical staple prices during the lean season. As a result, Stressed (IPC Phase 2) outcomes are expected through September across much of the country.

In October, many areas of the country are expected to improve to Minimal (IPC Phase 1) as households start accessing own foods from the main harvest. Similarly, market-dependent households will engage in agricultural labor and earn income to purchase food, increasing food access. Although, households who remain displaced and are able to earn some income from labor activities will continue to face Stressed (IPC Phase 2).

Households in the Northwest, worst-affected by kidnapping, banditry, and herder/farmer conflict, particularly in Sokoto, Zamfara, and Katsina States, will remain displaced and are expected to have difficulty engaging in normal livelihood activities. Moreover, these households are unable to engage in normal crop cultivation as they remain displaced and are mainly dependent on limited community support and market to access food. Similarly, they have limited income-earning opportunities during the lean season when staple prices are atypically elevated. As a result, these households worst affected by the conflict in Sokoto, Zamfara, and Katsina states will continue to face food consumption gaps and will be in Crisis (IPC Phase 3) outcomes through January 2022. Some households who remain displaced for a prolonged period and unable to
engage in even a small level of cultivation during the 2020 season and have limited or no food stocks and are entirely reliant on market and community support are expected to face large food consumption gaps indicative of Emergency (IPC Phase 4) or Catastrophe (IPC Phase 5). Although, in areas less impacted by conflict across Sokoto, Zamfara, and Katsina, where households are able to engage in some crop cultivation activities and have access to market and income-earning opportunities, Stressed (IPC Phase 2) outcomes are expected through at least January 2022.

In the Northeast, conflict related to Boko Haram is expected to continue to escalate and significantly disrupting normal livelihood activities for most households. Multiple population displacement will likely persist, and income-earning opportunities will remain restricted. Most displaced households remain highly dependent on humanitarian assistance to meet their basic food needs, particularly IDPs who remain in camps. These populations are expected to continue facing Stressed (IPC Phase 2) outcomes through at least September. However, as these households engaged in limited cultivation activities and mainly depend on assistance to access limited food and income, Crisis (IPC Phase 3) outcomes are expected to emerge around October.

Households outside of the IDP settlements within the Northeast and who remain outside urban centers will continue to receive limited or no humanitarian assistance, remaining dependent on market purchase. The atypically high staple prices are expected to further constrain food access as the lean season peaks. Similarly, income-earning opportunities are expected to remain constrained. As a result, many of these areas are expected to sustain Crisis (IPC Phase 3) outcomes through at least January 2022; however, some marginal improvement is expected as the harvest becomes available in areas less affected by conflict.

Households in hard-to-reach areas worst affected by conflict, inability to engage in normal livelihood activities, and limited market access will continue to face larger food consumption gaps and are expected to remain in Emergency (IPC Phase 4) through September. These households will engage in atypical livelihoods strategies such as wild food consumption, migrating, and bartering to access food. During the growing season, households will have increased access to wild food consumption, particularly towards the main harvest when these wild foods are readily available; however, this is not expected to improve food consumption significantly. The main harvest will start in October, and households who engaged in the season will start access the harvest; however, this will not cover their food needs, and Crisis (IPC Phase 3) outcomes are expected through at least January 2022. In hard-to-reach areas, where the harvest is limited, households are only expected to meet some of their food needs for a short period of time. These areas are expected to remain in Emergency (IPC Phase 4) through at least January 2022. A risk of Famine (IPC Phase 5) persists, where in a worst-case scenario, Famine (IPC Phase 5) could occur if conflict significantly reduces household movement to access food and income and humanitarian access.

The prevalence of acute malnutrition is expected to remain elevated across northern areas of the country due to limited food consumption, higher rates of measles and malaria, especially in the Northeast. The February Acute Malnutrition IPC Analysis covering through August 2021 projected a deterioration in the rate of acute malnutrition for most LGAs in Borno and Yobe States through August, corresponding to the lean season. A decline in the prevalence of acute malnutrition is expected to start the main season harvest in September/October 2021 through January 2021 across most parts of the country.
Events that Might Change the Outlook

Possible events over the next eight months that could change the most-likely scenario.

<table>
<thead>
<tr>
<th>Area</th>
<th>Event</th>
<th>Impact on food security outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>National</td>
<td>Below-average rainfall for the 2021 season</td>
<td>• Below-average crop production and reduced food access. Limited pastoral resources and intense competition, and earlier than usual depletion of pastoral resources and loss of income, milk, and meat.</td>
</tr>
<tr>
<td>National</td>
<td>Widespread flooding</td>
<td>• Below average main harvest, constraining food and income access.</td>
</tr>
<tr>
<td>Northeast</td>
<td>Prolonged deterioration of Boko Haram conflict in the Northeast.</td>
<td>• Increased population displacement, limiting food and income access.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Increased assistance needs, increasing competition for assistance, and constraining income and food access.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Population cutoff and have limited or no assistance leading to Famine (IPC Phase 5)</td>
</tr>
</tbody>
</table>

AREAS OF CONCERN

**Partially accessible LGAs in Eastern Borno state, Dikwa and Marte (Livelihood Zone 9)**

**Current situation**

Dikwa and Marte have witnessed an increased level of attacks compared to last year; these attacks, in addition to military operations within the area, resulted in substantial population displacement. According to IOM, following an attack in Dikwa on June 8, around 1,600 persons moved from Dikwa were displaced to Jere and Maiduguri. Since the beginning of March, over 20,000 persons have been displaced, and over 7,000 returnees reported from Maiduguri to Dikwa. Dikwa have seen multiple attacks resulting in multiple displacements of the affected households who relocated to safer areas, including Maiduguri and Monguno. Similarly, IDPs who were displaced from Marte towards Dikwa in multitudes were as well displaced multiple times. The spate of multiple attacks within this axis resulted in reduced humanitarian assistance provision to these affected populations.

Main season food production, particularly staple food, is substantially below average compared to last year and the pre-conflict period following increased levels of conflict, restrictions on tall-growing crops, limited access to farmland, and the increase in the price of agricultural inputs. Income-generating opportunities in the region remain significantly below normal. Although access to agricultural labor, including land clearing, planting, weeding, and harvest, has increased slightly following the commencement of the ongoing season. However, daily wages remain substantially below average given the increase in labor supply and low demand. Other opportunities include sales of firewood, petty trading, wild foods, and construction and labor migration, all of which income generated by poorer households remains low.

Prices of staple foods remain atypically high and above the five-year average as poor macroeconomic conditions. Furthermore, markets in Dikwa and Marte rely on Maiduguri for supplies, and transportation between Dikwa and Marte requires military escort following a deteriorating level of insecurity with a substantial effect on the cost of transportation, particularly to Marte town, further increasing food prices. Similarly, as the lean season progresses, household and market stocks are depleted, increasing reliance and market demand and contributing to the rising food prices. Poorer households with low access to cash income continue to face difficulty accessing staple food throughout the outlook period.

Humanitarian assistance was delivered to nearly 12,000 households in Dikwa and Marte LGAs. Although humanitarian assistance is ongoing, this is significantly lower following the persisting attacks on humanitarian facilities and personnel by the insurgents. The levels are lower than what was ongoing earlier in 2021 and late 2020. Due to the attacks, humanitarian activities in Dikwa and Damasak were suspended by the UN agencies.

Worst conflict-affected households have seen multiple displacements in Dikwa and Marte LGAs and have little access to humanitarian assistance, constrained income opportunities, and limited market access. Most poor households primarily rely on wild food consumption and are experiencing Emergency (IPC Phase 4).
Assumptions

- Market functioning and staple food supply are expected to remain significantly below average as markets in Dikwa and Marte continue to rely on Maiduguri for supplies with military escorts.

- Agricultural labor remains the primary source of income for poor households and is expected to remain limited and significantly below average through January 2022. Poorer households are likely to continue to rely on remittances, increased begging, and labor migration for some income.

- Humanitarian assistance would remain constrained by the level of insecurity and is expected to be below levels seen over the last five years.

Most Likely Food Security Outcomes

Poor households in Dikwa and Marte LGAs with limited access to income opportunities and largely dependent on market purchase for food will likely face Emergency (IPC Phase 4) outcomes through January 2022. Beginning in October, the households who engaged in the agricultural season are expected to harvest some crops for consumption. These households are also likely to share some of their stocks with relatives and community members. However, as households have limited harvest, households are still expected to face consumption deficits. As a result, Crisis (IPC Phase 3) outcomes are expected for a short time in October and November. As households become market reliant in late November and December, consumption gaps are likely to increase and Emergency (IPC Phase 4). Extreme levels of acute food insecurity, Famine (IPC Phase 5) is possible in a worst-case scenario where a shift in conflict would significantly restrict humanitarian access and household access to typical food and income sources.

Malnutrition is expected to remain elevated following the measles outbreak, increases in malaria cases, and poor food consumption. Access to these areas by humanitarian actors remains limited following increased attacks on health facilities and INGOs facilities and temporary suspension of UN operations in Dikwa. The acute malnutrition situation is projected to deteriorate to 'Critical' (Global acute malnutrition rate by weight for height z-score between 15 to 29.9 percent) in Dikwa.

Households affected by armed banditry, kidnapping, and cattle rustling in Anka and Maru LGAs, Zamfara state (Livelihood zone 11)

Current Situation

The security situation remains fluid in Anka and Maru LGAs of Zamfara State and the Northwest, with sporadic attacks and abductions still ongoing in parts of the two LGAs. These attacks have led to the displacement of people and the disruption of agricultural activities. Since last year, increasing levels of conflict have led to the displacement of about 2,500 households from some communities such as Kanoma, Dan Gulbi, Maiyanti, Dansadau, Daraji, and Kaduari in Maru LGAs.

Markets in affected areas are functioning at below-average levels. In Anka LGA, the Central market in Bagega was closed down entirely in January 2020. Although this was re-opened in late March, it is still functioning below an average level. In Maru LGA, markets in Dansadau, Dan Kurmi, and Magami districts are still functioning at low capacities because of the activities of bandits, cattle rustlers, and kidnappers. In an effort to restore peace and order to crisis-affected communities, the Zamfara State government in late May ordered the immediate closure of four markets in the state. These are essential markets within Birnin Magaji and Maru LGAs as well as in Zamfara state. Hence this would continue to impact trade within the region.

Food production and farming activities have suffered setbacks in most communities in Maru LGA following a lack of access to farmland ahead of the 2021 cropping season due to bandits and fear of attack. Restricted access to land, particularly for large-scale farmers, results in below-average availability of agricultural labor. For areas that can engage in crop production, households only cultivate limited areas due to constrained land access, below-average income, and the high cost of agricultural inputs. Consequently, the level of crop cultivation for the current season is below average.

Most pastoralists have fled these areas due to cattle rustling and kidnapping activities. Substantial pastoralists families have relocated to neighboring states to avoid the persisting conflict. Some pastoralists have disposed of their stocks to purchase
food and pay ransom to kidnappers. Others reduced the stock level for ease of movement and evade bandit’s attack. Thus, the herd sizes are below average in the area.

Staple food prices in the region have remained above average following low food production, market disruptions, and the increasing number of IDPs who primarily rely on the market for food, resulting in an above-average demand.

Income-generating opportunities remain constrained following a significant reduction in farming activities and labor in general. Daily wages as well reduced following the increase in labor supply and low demand. Some affected households resorted to labor migration to earn income outside the area; others are engaged in petty trading, water hawking, and crafts to earn little income.

The conflict-affected households in the area are atypically dependent on the market, community support, and intense labor work for income and food. Labor wages and purchasing power of most households are below average. As a result, Crisis (IPC Phase 3) outcomes are ongoing. Some worst-affected households by the conflict that remain displaced for a prolonged period and unable to engage in crop cultivation during the previous season can only mitigate food consumption gaps by liquidating livelihood assets and are expected to be Emergency (IPC Phase 4) or Catastrophe (IPC Phase 5).

Assumptions

In addition to the national assumptions above, the most likely scenario for the June 2021 to January 2022 period for this area is based on the following assumptions:

- Market functioning is expected to remain disrupted following persisting activities of bandits in the region. Market food supplies will be constrained as the conflict persists and traders evade affected areas due to fear of attacks. Towards the impending lean season, most households will resort to markets to access food leading to increased market demand and staple food prices.
- Humanitarian actors are less active in the Northwest, with limited assistance, and the situation will persist through January 2022. The State and Federal governments will remain most active in aiding the most vulnerable and conflict-affected households in the area.

Most Likely Food Security Outcomes

Households that remain displaced due to conflict with little or no harvest from primary season production are expected to remain primarily dependent on the market, with atypically high staple food prices. This will most likely result in these populations having difficulty meeting their food needs and will likely face Crisis (IPC Phase 3) outcomes through January 2022. Households displaced for a prolonged period with little or no access to income-earning activities are expected to rely on wild foods and limited food purchases to access food. These households are expected to face large food consumption gaps or engage in livelihood coping strategies that include sales of assets. As a result, some households are expected to face Emergency (IPC Phase 4) in these areas.
MOST LIKELY FOOD SECURITY OUTCOMES AND AREAS RECEIVING SIGNIFICANT LEVELS OF HUMANITARIAN ASSISTANCE*

Each of these maps adheres to IPC v3.0 humanitarian assistance mapping protocols and flags where significant levels of humanitarian assistance are being/are expected to be provided. ☼ indicates that at least 25 percent of households receive on average 25–50 percent of caloric needs from humanitarian food assistance (HFA). ☀ indicates that at least 25 percent of households receive on average over 50 percent of caloric needs through HFA. This mapping protocol differs from the (!) protocol used in the maps at the top of the report. The use of (!) indicates areas that would likely be at least one phase worse in the absence of current or programmed humanitarian assistance.

FEWS NET classification is IPC-compatible. IPC-compatible analysis follows key IPC protocols but does not necessarily reflect the consensus of national food security partners.

ABOUT SCENARIO DEVELOPMENT
To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming eight months. Learn more here.