West Africa

Nigeria

This country is monitored by local FEWS NET staff

Food Security Outlook

Crisis food insecurity in the northeast

January 2014 to June 2014

Key Messages:
The country’s main harvest has concluded, increasing food availability and access. In general, the harvest was favorable due to a lack of major shocks (e.g. flooding, pest infestation, and drought) and increased access to inputs. Consequently, most of the population will be in Minimal food insecurity (IPC Phase 1) between January and June.

The Boko Haram conflict in the northeast persists. Substantial populations have been displaced in Borno, Yobe, and Adamawa states, limiting farming, market access, and income-generating activities. Crop production was also below average in these areas. Households in Borno and
Yobe states are worst affected and projected to remain in Crisis (IPC Phase 3) acute food insecurity during the January to June period.

Households in localized areas of the north-central and southwestern parts of the country were affected by flooding and dry spells, which resulted in a below average harvest. By April, poor households will be reliant on market purchases and face high prices to access food. Households in Niger state are most affected and are expected to face Stressed (IPC Phase 2) acute food insecurity between April and June.

**National Overview**

**CURRENT SITUATION**

The main harvest concluded in January across the country for millet and long cycle crops, including sorghum, rice and groundnut. This has improved food availability, diversity and access at the household level, and increased food supply on both rural and urban markets, with prices for the above commodities near their seasonal low.

Spatial and temporal rainfall distribution was relatively normal for the 2013 growing season in most areas, with minimal flooding and localized dry spells occurring. The atypical, localized, intermittent dry spells occurred most prominently in the north-central and southwest of the country, which resulted in crop damage, impacting cereal and legume production in the affected zones (Niger, Kwara, and Kogi states in the north-central, Zamfara and Sokoto states in the northwest, and Oyo and Osun states in the southwest). Similarly, typical levels of seasonal flooding occurred in parts of Kano, Katsina, Zamfara, Kebbi, Kogi, Sokoto, Bauchi and Gombe States in the north and in Delta, Cross River, Anambra, Ebonyi and Imo states in the south. The level of flood damage across the country is less than last year (a particularly bad year of flooding), with limited impact on both crop and livestock performances.

Households in the northeast of the country saw their production capacity reduced again this year not only due to poorly distributed precipitation during the rainy season, but also due to continued disruption of their agricultural activities by the persistent Boko Haram conflict. At the national level, overall countrywide crop production levels for the recent harvest is higher than last year, but lower than the five-year average.

The federal government launched in January dry season farming support for 2014 activities. There was an increase funding from NGN9 billion for the 2012 season to NGN14 billion for current 2014 dry season activities. Assistance is mainly focused on rice, groundnut, millet, sorghum and wheat production along the major river floodplains across the country. Irrigation and fishing activities which began normally in December will continue along major floodplains.
The price of major cereals, including maize, millet and sorghum, did not vary significantly on most markets in December relative to November. Prices of cereals are higher, however, than the five-year average price on most markets, impacting poor households currently dependent on market purchase, particularly those affected by flooding, dry spells and conflicts across the country. On Dawanau market, a major cereal market in West Africa, millet and sorghum prices have increased by seven and nine percent respectively in December, relative to November, likely indicating strong domestic and inter-regional demand. Maize prices, however, remained stable over the same period. Similar market behaviours are seen on most markets in surplus cereal production areas. As the harvest of cassava intensifies, gari prices declined in December by nine percent relative to November and 17 percent relative to the same time last year on Bodija market in Oyo state, though prices remain about four percent above average.

Industrial and institutional purchases, which normally occur between January and February, have so far been below-normal and have had a minimal impact on food prices in surplus-producing areas. Industrial demand for maize and sorghum has been low due to below-average demand from the poultry and malting industries.

In most parts of the country, average rainfall this growing season lead to normal pasture and water availability and has contributed to normal livestock body conditions. This is married, however, with seasonally low levels of livestock demand due to limited funds among livestock traders and low demand from most households across the country. The effects of conflict in the northeast and cattle rustling in the northwest are limiting livestock supply on most markets. Current livestock prices continue to be measurably higher than the five-year average on most markets.

Most households across the country are engaged in their normal livelihood activities and earning average incomes. Exceptions are households affected by conflicts, atypical dry spells or flooding and have below average harvest and limited income sources from the main harvest.

ASSUMPTIONS

The most likely scenario for the January to June 2014 period is based on the following national-level assumptions:

- **Household food stocks and access**: In areas not affected by flooding, dry spell or conflict, food stock levels will be average following the favorable cropping season and average harvest.
- **Dry season activities**: Dry season activities will be average to above average in most areas across the country, except in areas affected by flooding, atypical dryness, and conflict.
- **Green harvests in the south**: The early green harvest of yams and maize in the south will begin in May/June as normal, slightly tempering lean season food shortages.
- **Land preparation/sowing**: Land preparation activities will begin normally in February and will continue through May. Sowing will begin in the south starting in
March and by May/June will have started in the north, depending on the area. Both of these activities will increase labor opportunities and income levels at seasonably typical levels for households in most areas.

- **Income levels**: Most households will engage in their normal livelihood activities such as local and migrant labor, and the sale of cash crops, livestock and crafts.
- **Fuel prices**: High unofficial fuel prices are expected to persist throughout the scenario period, contributing to elevated transportation costs.
- **Industrial/institutional food demand**: Poultry farmer demand for maize will increase especially through June as Ramadan approaches. The federal government of Nigeria through the strategic grains reserve is replenishing the security stocks, though with limited expected impacts on food prices.
- **Household food demand**: Food demand will increase between late June and July in preparation for Ramadan, increasing food prices, particularly for millet.
- **Food prices**: Throughout the scenario period, but particularly between April and June, an atypically large share of the population will be dependent on market purchases, causing food prices to increase at a faster rate than normal. Prices will exceed both last year’s and five-year average prices for most staple commodities.
- **Transhumance movements**: Livestock movements southward will begin earlier than normal in January/February as against March normally and will continue through June. Early transhumance is due to low pasture availability across the northern areas (dry spell impact), cattle rustling in the northwest and farmer/pastoralists conflict in the central states.
- **Livestock sales**: Sales will be average during January to March period when body conditions are good and prices are favorable for pastoralists. Between April and June, prices will decline at typical rates as pastoral resources deplete and livestock conditions decline, and pastoralists sell more to meet their food and non-food needs.
- **Civil insecurity**: Civil insecurity related to the Boko Haram conflict will continue to restrict market, trade and livelihoods activities, especially in northern areas.
- **Cross border trade**: Trade with neighboring Niger, Chad and Cameroon through northeastern borders will continue to be limited due border closures and security concerns from the Boko Haram conflict. Aside from the northeast, though, cross border trade flows are expected to be average to above average.

**MOST LIKELY FOOD SECURITY OUTCOMES**

During the January to March 2014 period an increase in dry season activities across the country will increase income earning opportunities, purchasing power, and food access. Coupled with the harvest of late maturing crops of millet, sorghum, cowpea and groundnut, even in western areas perviously affected by dry spells, most households in the country will have a typical access to food and income and will experience Minimal acute food insecurity (IPC Phase 1) between January and March 2014. Households in the northeast, however, will experience food insecurity related to civil conflict, as is discussed further below.

Minimal (IPC Phase 1) acute food insecurity levels will persist for most households across the country between April and June. Even though they resort more to market purchase to meet their consumption needs, most households will experience typical revenues through
income-generating activities. For households in central and southwest areas of the country affected by atypical dryness during the rainy season and those households in the northeast affected by conflict, negative acute food security outcomes are expected.

Areas of Concern

NE Millet and Cowpeas Livelihood Zone in Borno and Yobe states

The major livelihood activities of most households in this zone is subsistence farming of mainly millet and sorghum. They also cultivate cowpeas during the main season as cash crops, and during the dry season they cultivate other cereals (rice, wheat, sorghum) as well as vegetables (tomatoes, onions, pepper). Animal husbandry of small ruminants, such as goat and sheep, is also a common practice. In a normal year, own harvest will last until June before households resort to markets to access food regularly.

CURRENT SITUATION

The Boko Haram related conflict in the northeast of the country has been ongoing since 2009. In November the government renewed the state of emergency, which began in May 2013. Population displacements to neighboring states within Nigeria, as well as to neighboring countries, also continue with the conflict. 2013 saw an increase in the rate of violence, as indicated by number of deaths reported (Nigeria Security Tracker). Although the population internally displaced is unknown, estimates from UNHCR indicate there are nearly 40,000 refugees (including Nigerien returnees) from the conflict in Niger, while about 4,000 Nigerian refugees are in Cameroon (also including returnees). The borders with Chad, Cameroon and part of Niger remained officially closed, limiting trade, though some informal trade activities continue.

In early December, the Borno state government put aside NGN100 million for victims of the Boko Haram conflict in the state. Assistance is also coming in from the National Emergency Management Agency (NEMA), Project for Sustainable Agriculture, Dangote Foundation and the I-Care foundation for Borno, Yobe and Adamawa states. Among other things, the humanitarian assistance aims to increase food access for victims of the conflict in the area. These levels of public and private assistance are significantly higher than last year.

While household stocks are generally increasing with the harvest, stocks of both staples and cash crops are still limited following a below-average growing season due in part to a slightly poor distribution of rainfall during the rainy season, but mostly because of disruption to cropping activities due to the conflict. Trade activities in the zone are below average with food flows limited due to roadblocks, security measures, border closures, and traders evading insecurity. The recent return of cellphone service in Borno state is expected to aid,
though in increasing trade activities. Compared to last year, prices for sorghum are up five percent, up more than 10 percent for maize and up nearly 30 percent for millet. Though cash crop production of cowpeas is well below average, cowpea prices are significantly above last year’s prices.

Income earning opportunities from the sale of livestock, petty trade, and wage labor are below average as the conflict persists in the area. Wage labor is below average with decreased demand due to security concerns in major urban areas in the zone. Transhumance across the border and to other parts of the country are at above-average levels due to the conflict, leading to decreased livestock and livestock products, reducing access to meat and milk at the homestead. This has also reduced income and purchasing power for households that rely on animal and animal product sales.

Cumulative rainfall totals, however, were satisfactory for pasture growth in the area and water availability in local rivers are good, pointing to favorable animal body conditions for animals that remain in the area. Even though demand for livestock in the area is below average, livestock prices are average to above average due to limited supply, from both within the region and due to decreased imports from Chad and Niger.

ASSUMPTIONS

Due to the difficulty of collecting information and data from this conflict area, the most likely food security outcomes for January to June 2014 period as outlined below are based on sometimes limited information from government and FEWS NET field sources. The assumptions used in this scenario are the following:

- **Conflict/displacement**: Population displacements will continue, both within the zone as well as to neighboring zones within Nigeria and neighboring countries (Niger, Chad, and Cameroon). The border closure with Chad, Niger and Cameroun are expected to remain.
- **Household stocks**: Household cereal supply will remain below average throughout the scenario period, though it will increase slightly during the dry season harvest in April, particularly for sorghum, rice and wheat. Market supply will be below normal due to below-average harvests and restricted trade activities in the area.
- **Off-season activities**: Dry season activities, which began normally in December and include cropping (tomatoe, onion, peper, rice) and fishing, will be average in most areas, including the Komadugu-Yobe floodplains of Yobe state. In Borno state, however, dry season activities will be below average due to intensifying conflict in the area.
- **Trade flows**: Due to the effects of civil insecurity and the state of emergency, road blocks and traders’ fears about security, continued below-average trade flows for both cereals and livestock are expected. Domestic and cross border trade flow from neighboring countries (Niger, Chad, Cameroon) will continue to be below average as well.
- **Food prices**: Food prices between January and March will be below pre-harvest levels due to the increase in supply from the recent harvest, though prices remain above average. Prices will increase significantly between April to June, further limiting
food access.

- **Pasture and water availability**: Pasture and water conditions will remain stable during the first several months of the dry season through March/April as is normal for this zone.
- **Livestock Prices**: Reduced livestock numbers will contribute to increased animal and animal product prices compared to average.
- **Agricultural income**: Income from livestock and cash crop sales are expected to be below average despite above average prices due to low household stocks.
- **2013/14 Harvest Preparation**: Land preparation activities will begin in March. Incomes earned from these activities are expected to be below average, however, due to a decrease in land cultivated and increase in labor competition.

**MOST LIKELY FOOD SECURITY OUTCOMES**

Due to the persisting conflict in the area, many poor households have not been able to engage typically in their normal livelihood activities for the past several years. Production from this past cropping season has been significantly below average, and consequently household food stocks will be depleted earlier than usual. This is further exacerbated by limited income earning opportunities in the area and high market prices, limiting food availability and access. Households will marginally be able to meet minimum food needs only with accelerated depletion of livelihood assets, meaning households in this area will face Crisis (IPC Phase 3) acute food insecurity during January to March period. From April to June, households will intensify market food purchases on credit, and use atypical sale of livestock and productive assets to meet basic food needs. Other households will skip meals and divert non-food resources to access food. This however, will not completely offset their difficulty in meeting their food needs, with households continuing to face Crisis (IPC Phase 3) acute food insecurity through June.

**NC Niger River Floodplain Rice and Sorghum Livelihood Zone in Niger state**

Most households in this area practice mainly subsistence farming and cultivate rice, sorghum and millet as staple crops, as well as yam, cassava, cowpea, groundnut, melon, and sesame as cash crops. Goats and sheep are also part of their assets. In a normal year, own harvests will last until about June before they will resort to markets for food purchases either by cash or credit. Debts are usually repaid after the subsequent harvest either in cash or in-kind.

**CURRENT SITUATION**

In this zone the rainy season began normally in April but was affected by intermittent dry spells between May and early August. This lead to below average main harvests of rice, maize, melon, millet, sorghum and groundnut, reducing substantially the production prospect in the area. The main harvest of most crops in the area was also below average for the previous year due to flooding, meaning farming households in the area are facing below average harvests for the second consecutive year. This year household access to food by way of own production is further limited by the necessity to repay loans from the previous consumption year during this harvest. Agricultural labor demand and wages are below
average during October to December period, decreasing household access to income, and thereby market purchase. Many households resorted to intense labor work, the atypical sale of livestock and crafts to meet their basic food needs from October to December and experienced Stressed (IPC Phase 2) acute food insecurity.

The late harvest this year for the long cycle crops, including sorghum, late millet, rice, and groundnut, concluded in January, aiding to increase food availability, diversity and access for households. The late harvest also came in below average, however, and 2013/2014 cropping season production stocks are only expected to last until early April, as opposed to June/July in a typical year.

Markets are currently functioning normally. New late harvest stock supply is contributing to a decline in food prices, though prices are still above last year and five-year average levels for most food stuffs in the area, somewhat attributable to below-average harvest supplies. Millet and maize prices are up by about 20 percent compared to last year, while sorghum prices are up by more than a third compared to prices at the same time last year, with prices for millet an maize above five-year average prices as well. Though market prices remain above average, most households are currently benefiting from the recently completed late harvests and have not yet needed to resort to market purchase for their consumption needs.

With cash crop production below average in the area, cash crop prices are also above last years levels. Groundnut prices are up 10 – 20% and soybean prices are up by about 20%, likely due in part to increased industrial demand, where melon prices are up by almost half. Only cowpea prices are below last year’s prices, in part due to high trader carryover stocks from last year. Prices for all cash crops remain generally higher than the five-year average. Households and traders who can are expected to hold their cowpea stocks until later in the year when they expected higher returns.

Pasture growth and watering point levels are below average and last year’s levels due to the impacts of the dry spells in the area. Current livestock body conditions are, however, good for this time of the year as the pasture levels have not yet deteriorated. While goat prices are relatively stable compared to last year, sheep prices are up slightly relative to last year, and prices for both are similar to five-year average.

Income from crop sales and agricultural labor from the main and late harvests was below average due to the below-average productivity. Poor households have resorted to more casual labor, though labor wages are decreasing with the increase in labor supply. With the dry season activities beginning in December, though, labor opportunities have increased.

ASSUMPTIONS

The most likely scenario for the January to June 2014 period is based on the following assumptions:

- **Household stocks**: Stocks will deplete in April, two to three months earlier than normal, due to dry spell impacts which lead to below average crop production in the
Industrial demand: Demand will be average, with the seasonal increase in demand beginning in February/March. Traders will replenish their stocks for both cereals and cash crops.

Off-season activities: Fishing and cropping are underway and continue through March/April when harvests begin and water levels recede. Crop harvests will likely be average, despite slightly below-average water levels, due to increased government support.

Livestock: Water and pasture availability in the area will be below-average, leading to early depletion of pasture in April, as opposed to May typically. Livestock body conditions will depreciate earlier than normal and prices will decline more than normal between March and June. The limited pasture and water availability will also likely lead to an early start to transhumance, in February as opposed to March.

Livestock sales: Poor households will intensify their sale of goats and sheep between April and June to access to have more income available to purchase staples at market.

Land preparation: Activities for the upcoming season will begin normally in February/March, increasing income earning opportunities. Slightly less land will likely be cleared due to limited income to engage labor. Planting of crops will likely begin normally in April and weeding activities will occur during May/June period, increasing labor opportunities and income in a typical fashion.

Agriculture labor: Household agricultural labor income will be near average despite increased participation due to below average wages.

Labor migration: Cash transfers from labor migration will be near average, with typical levels of labor demand in urban centers.

MOST LIKELY FOOD SECURITY OUTCOMES

Between January and March poor households in this area have increased income and food stocks compared to previous months as the main harvest concludes in January. Between February and March, land preparation activities for the upcoming season will begin, increasing income earning opportunities. Food prices will be near their lowest for the year and households will be able to meet their food and non-food needs without recourse to atypical coping strategies. As such, most households in the area will experience Minimal acute food insecurity (IPC Phase 1) between January and March.

Due to the below average main harvest, poor households will resort to market purchase by two to three months earlier than normal, beginning in April. Market food supply will also decline and prices will increase during this period, limiting food access. Poor households will resort to the sale of additional livestock and more intense labor opportunities for additional income, but will not still not be able to meet all their non-food needs as they face Stressed (IPC Phase 2) acute food insecurity between April and June.

Events that Can Change the Outlook
Table 1: Possible events over the next six months that could change the most-likely scenario.

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<thead>
<tr>
<th>Area</th>
<th>Event</th>
<th>Impact on food security outcomes</th>
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<tbody>
<tr>
<td>National</td>
<td>Increased imports through the southwestern borders</td>
<td>Increased food availability, and a reduction of atypically high food prices on local markets, increasing food access</td>
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|                                        | Late onset of the 2014 rainy season    | • Reduced agricultural related labor opportunities and incomes, limiting food access during the lean season;  
                                        |                                        | • Increased trader speculations and higher food prices, limiting food access      |
| NC Niger River floodplain rice and sorghum | Increase in humanitarian assistance    | • Improved food availability and access;  
                                        |                                        | • Reduction in prevalence of food related malnutrition                           |
| NE millet and cowpeas livelihood zone   | Escalation of conflict                | • Further restriction to market access;  
                                        |                                        | • Limited income opportunities;  
                                        |                                        | • Increased gaps in food consumption                                              |
|                                        |                                       | And although we assume that conflict will maintain status quo levels, it is possible that there will be an escalation, in which case there will be more displacements, more impediment to markets, bad start of season for labor in May/June, etc. |

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 six months. Learn more here.
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