NIGERIA Food Security Outlook Update September 2010

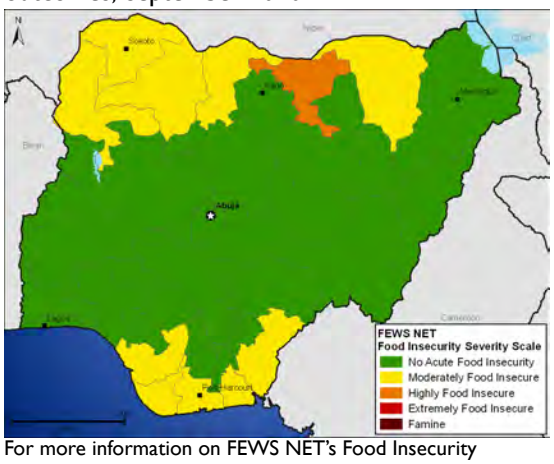
Food security among the poor begins recovery in the extreme North

- Prospects for the 2010 growing season are generally favorable and the country will likely experience another normal to above-normal cereal and tuber harvest in October and November.

- In localized areas of the Northeast and the Northwest, abnormally low rainfall and a potential cessation of rains two dekads before the normal conclusion of the season may reduce millet and sorghum harvests, limiting 2010/11 household food stocks.

- Recent weather forecasts indicate a high probability of excessive rains, leading to more flooding in September than normal in the southern parts of Delta, Ondo, Ogun and Lagos. This will compound the impact of previous flooding, exacerbating dependence on food assistance and shelters and maintaining moderate food insecurity until November, when the waters recede. Gari, maize and yam prices will rise in the affected areas, due to limited market supplies, as flooding hampers access to markets.

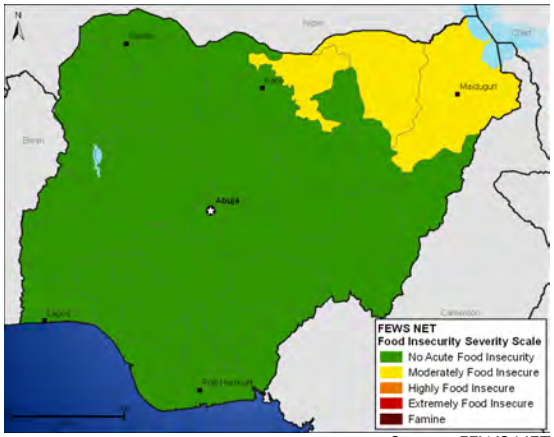
Figure 1. Map of most likely s food security outcomes, September 2010



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

Source: *FEWS NET*

Figure 2. Map of most likely food security outcomes, October-December 2010



Source: *FEWS NET*

Updated Outlook through December 2010

Three weeks before the conclusion of the 2010 growing season, significant variations in rainfall totals and distribution, led to mixed soil moisture and crop growth throughout the country, as shown by the Water Requirements Satisfaction Index Anomaly (Figure 3). Reports from the Nigerian Meteorological Agency, NIMET and FEWS NET field enumerators indicated significantly below-normal rainfall (5 – 15 mm) during the second and the beginning of the third decade of September in the northern areas of Yobe and Borno in the extreme Northeast; Sokoto in the extreme Northwest; and Gombe, Adamawa, and Taraba, in the North Central. Most of the same areas experienced reduced soil moisture due to 10 to 14 dry days in August, leading to delays in crop development. According to ground reports from FEWS NET enumerators, about 70 percent of millet is in booting and heading stages instead of grain filling in a normal year at this time, and about 80 percent of maize is in grain filling stage, instead of maturity, in Northern Borno and Yobe, during the second dekad of September. Therefore, it is important that rains continue through mid-October, therefore, for crops to mature fully. Unfortunately, such unusually low rainfall volumes are consistent with recent updates of NIMET predictions of a potential early end of the season in these areas.

If rains behave as forecast and do not continue through mid-October, long-cycle millet, sorghum, and cowpea harvests will be further reduced. Poor households will have both below-normal cereal stocks and below-normal income from sales of

This report provides an update to the July 2010 FEWS NET Food Security Outlook report which estimated food security conditions in July through December 2010. The next Outlook report will be released in October and will cover the October 2010 to March 2011 period.

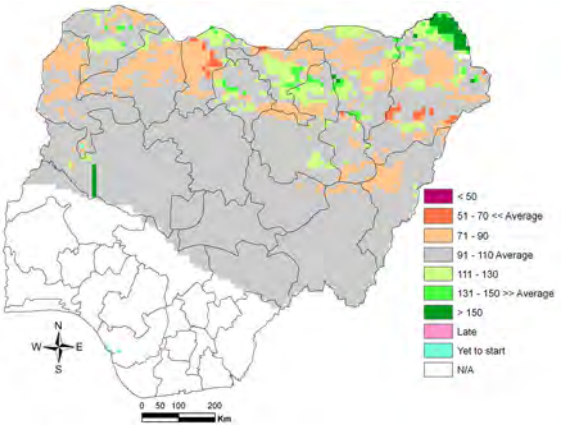
FEWS NET Nigeria
Abuja
Tel: (234) 9 461 4921
nigeria@fews.net

FEWS NET Washington
1717 H St NW
Washington DC 20006
info@fews.net

FEWS NET is a USAID-funded activity. The authors' views expressed in this publication do not necessarily reflect the view of the United States Agency for International Development or the United States Government.

cereals and cash crops. They will face food deficits, ranging from 20 to 30 percent of their annual food needs that they will need to purchase on the markets as of March instead of May or June, in a normal year. These expectations of above-normal expenditures will force them to find alternative options to earn cash, such as borrowing from medium and rich households and spending more time and energy than normal in September working on farms, during dry season farming during the November-March period.

Figure 3: Satellite-derived GeoWRSI estimate of Water Requirements Satisfaction Index Anomaly 2nd dekad, September 2010



Source: *NOAA/USGS/FEWS NET*

Additional areas of concern are localized areas in Jigawa, Zamfara, Kaduna, Nassarawa, Sokoto and Gombe, where flooding induced by excessive rains and/or opening of dams was reported during the last dekad of August and the first dekad of September. In Jigawa state, in the North East, flooding has destroyed more than one third of millet, sorghum and cowpea crops and displaced over a million and a half people, which is 38 percent of the total population of the state. The normal reduction in rains observed in these areas during the second dekad of September is a welcome break. Soil moisture is likely to drop to normal levels, during the last dekad of September and the first dekad of October, allowing some flood-resistant crops, such as millet, to recover from excessive moisture. It will, however, have little impact on lost and severely damaged crops (estimated at one third of the millet planted in northern Katsina in the extreme Northwest), resulting in reductions in areas planted decrease and cereal quantities harvested. Demand for agricultural labor will drop by 30 percent of its normal levels, in late September, October and November, leading to a reduction of household income, derived from agricultural labor by about 25 percent.

The recent FEWS NET mission in the North revealed that food security among the poor improved in late August and early September when compared to previous months. A farm laborer in Yobe, can access 14 kg of millet daily in September, as compared to 12.5 kg of millet daily in August. Most poor households will increase income generation options by selling some harvest to meet cash needs for debts repayment and non-food needs. They are now consuming the green harvest, supplemented by wild food. For most poor households, these benefits will not be sufficient to cover the 2010 lean season food deficit, which was larger than normal due to the effects of poorly-distributed rainfall on 2009/10 agricultural production.

In pastoral rangelands in the North, recent rains have improved the water volume in streams and wells, improving pastoral household food security conditions and suggesting the start of the recovery period. Distress migration to conflict-prone areas, such as areas in Plateau and Bauchi, acute water shortages, very low milk yield, and long trekking distances, which prevailed in July and August in the rangelands of the extreme North, has now eased off. Livestock markets, which have been depressed since June due to abnormally high supply and poor livestock body conditions, showed the first signs of improvement in September. Millet-to-goat terms of trade were 53 kg/goat in August, as compared to 90 kg/goat in September, implying increased purchasing power and access to food from livestock sales.

However, these improvements in conditions will not translate to enhanced food security outcomes until at least November. Given the very poor livestock body conditions in June, July, and August, milk production (a major source of food and income in September and October) will not reach normal levels until November. Recovery will also be difficult as most pastoral households sold more livestock than normal in July and August and may not be able to sell as many as normal in 2010/11. Because poor pastoralist households have limited livelihood options, complete restoration of livelihoods will take at least one year, provided that pasture and water conditions will be favorable during the next growing season.

Three weeks before the onset of main harvest, the bulk of the newly-harvested crops have reached local and urban markets, increasing cash-crop and cereal supplies and pushing prices down faster in the North-Central than the extreme North. The trend in high supplies and decreasing cereal prices will continue in October and November, as the main harvest peaks. Rich and middle-income farmers and commercial traders will sell a large portion of their stocks in October to earn money for the Muslim Pilgrimage to Saudi Arabia in November, contributing to high market supplies.

The value of the Naira dropped from 1 NGN/3.7 XOF in July to 1 NGN/3.5 XOF in late August and early September. The recent depreciation of the naira vis a vis the CFA is not yet reflected in high food demand from traders in neighboring countries such as Niger and Chad, who are waiting for the full harvest in October to purchase when supply is highest and prices are lowest. Domestic traders and industries will also take advantage of favorable market conditions to buy maize, millet, and cowpea extensively in October, November and December.

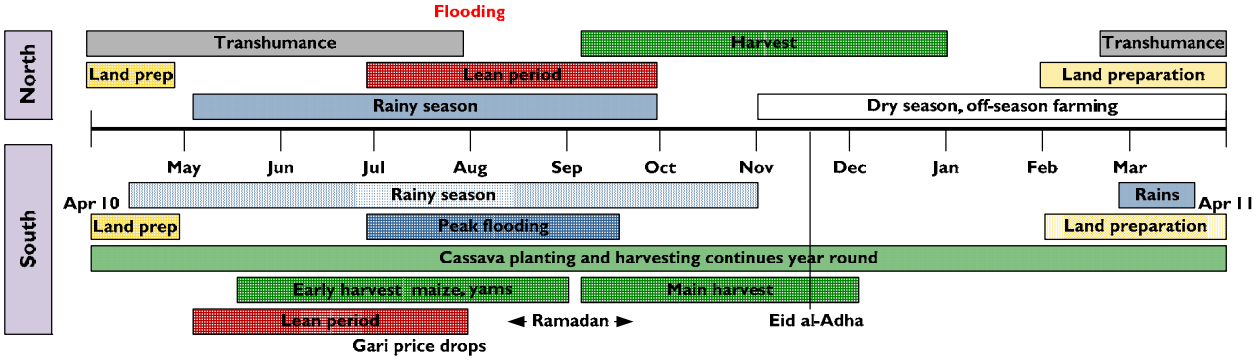
The area most affected by extended dry spells, flooding, and an early potential cessation of rains is a narrow belt, largely dependent on rain-fed agriculture for food needs, representing less than 10 percent of the country's total population. Despite the relatively small geographical areas, theses zones are key millet, sorghum, and cowpea-producing areas, implying that the impacts on millet, sorghum, and cowpea trade could be significant. The current delay in crop growth is likely to delay harvest by 2 to 3 weeks. This will delay, in turn, the arrival of the full harvest to major northern markets, keeping supplies unusually low and prices abnormally high during the first two dekads of October.

The combined effects of poor water quality, poor sanitation, and a lack of preventive care has led to the worst cholera epidemic in Nigeria in 19 years. In September the epidemic spans 11 states in the Northeast, the Northwest and the Southeast. About 6,500 cases, including 350 deaths, were recorded by mid-September. In the local governments of Bauchi, Gombe, and Borno, where the highest prevalence was recorded (1,725, 1,188 and 1090 cases, respectively), the epidemic is likely to contribute to a deterioration of children's health, especially in the extreme North where background levels of malnutrition are high. Given that many young people will be either sick or have to take care of their sick parents, agricultural labor availability is likely to drop, affecting cereal crops, disturbing harvest, and contributing to localized production shortages.

In the South, all the maize and 80 percent of the yam for the first season have been harvested as of the first dekad of September. Farmers lost up to one fourth of their maize and yam crops following a two-week dry spell in Oyo, Osun, and Ogun, in the Southwest and excessive flooding in Delta, Bayelsa, southern Ondo, and Lagos. Most southern poor households have the capacity to address these shortfalls through food purchases. Access to a variety of crops, vegetable and legumes is now easy throughout the South, as crops from early green harvest and main harvest are now reaching local markets, increasing supplies at market and household levels and leading to significant reductions in maize, yam, cassava, and cocoyam prices. The most recent weather forecast from NIMET and major meteorological agencies indicated a high probability of excessive rains in the southern parts of Delta, Ondo, Ogun, and Lagos. This is unusual for late September, as rains normally ease off after the peak of flooding in August. New flooding in September will compound the impact of previous floods on household food security by making more poor households dependent on food assistance and shelter, maintaining them in moderate food insecurity until November, when the waters recede.

Gari prices in the Southwest (in Bodija market, in Oyo state) dropped by seven percent between August and September for the second month in a row after two years of high prices (since March 2008). Prices are 47 percent lower than last year at this time, though still seven percent higher than their five-year average. The trend in decreasing gari, yam, and cassava prices will continue until December, dropping about 20 percent and facilitating poor household access to the three major foodstuffs in the South. As of mid December, however, normal consumption and very high demand for Christmas will push supplies down, driving prices up again to current levels.

Seasonal calendar and critical events



Source: *FEWS NET*