

NIGERIA Food Security Outlook

October 2010 to March 2011

- The month of October signals the peak of main harvest across the country. Key determinants of food access such as market food prices, household food replenishment and agricultural-based labor opportunities improved significantly across the country except in few areas of Jigawa, Sokoto and Kebbi in the North.
- A recent joint CILSS/FAO/WFP/FEWS NET post harvest assessment and field reports from FEWS NET enumerators revealed that household food insecurity is mainly concentrated in the lowland areas, near major rivers in Jigawa, Sokoto and Kebbi where excessive flooding in September has culminated, in October, in reduced household own- production and limited poor-household food and cash sources, posing a threat to their food security during the October-March period.
- Recovery of pastoral households in localized areas of the northern parts of Yobe and Borno, from the difficult 2010 lean season in July-early September will be slow, due poor animal body conditions and livestock losses incurred. Improvements in livestock-to-cereal terms of trade are modest.

Figure 1. Map of current estimated food security outcomes, October 2010

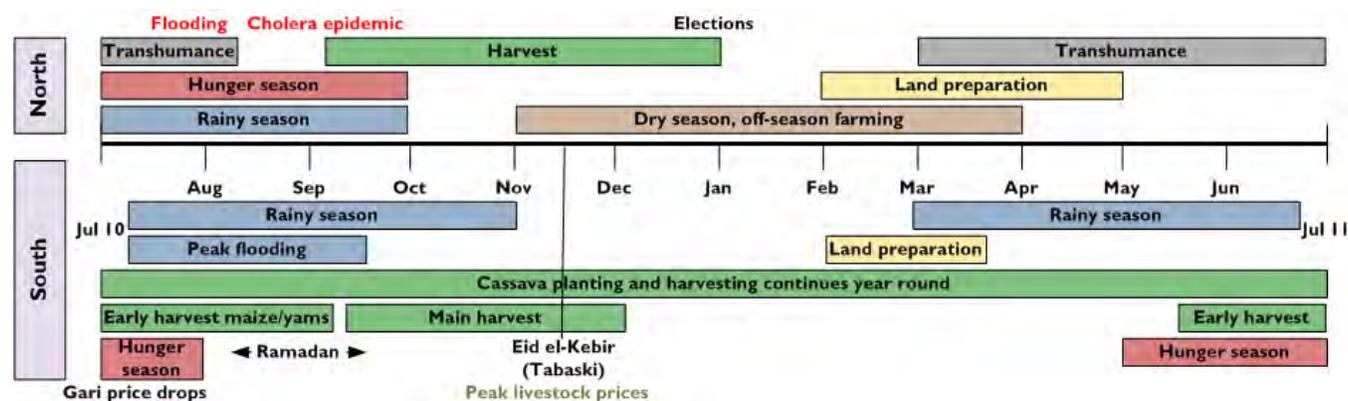


For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

Source: FEWS NET

- The outlook for the South points to mixed tubers and cereal production prospects, in October. The combination of yam, maize and cassava shortages and rising civil insecurity, due to the onset of pre-election campaign, in localized areas of the coastal areas of the South and localized areas of the Southeast and the Southwest, will expose most poor households to moderate food insecurity, during the October-March period.

Seasonal calendar and critical events



Source: FEWS NET

Most likely food security scenario (October 2010 -March 2011)

The joint CILSS/FAO/WFP/FEWS NET post-harvest assessment, conducted in mid October in nine states in the North and the South, revealed mixed production prospects. In most parts of the Extreme North and the North Central, an above-average harvest is anticipated, as rainfall conditions have remained favorable throughout season. Rains in these areas are extending to mid and late October, which is favorable for late-sown and lowland crops. Other key food security determinants, such as market food prices, household stocks, and agricultural-based labor opportunities are also favorable in October.

Traders’ speculative behavior between November and January and abnormally high demand for livestock, vegetables and condiments, due to high consumption before and during Eid al-Kebir (Tabaski) during the first two weeks of November, will lead to 30 to 35 percent increase in sheep, meat and vegetable prices compared to September price levels. Industrial demand will peak, with poultry farms purchasing large volumes of maize while breweries will buy sorghum and food processing companies, sorghum, millet and cash crops extensively to replenish their stocks. Fuel prices are expected to rise abnormally by up to 20 percent, given high fuel demand by political stakeholders, who will need to travel extensively, in anticipation of the presidential, state, and local elections, scheduled for the first quarter of 2011. Most households will travel, in November and December, to join their families for the holidays, increasing further household fuel demand

As of October, imports from Niger are limited to cowpea and livestock, which is normal for this period of the year. Nigerian traders are still waiting for lower prices expected in November/December in Nigerian markets before buying sorghum and maize for export to Niger, since millet production is reportedly high in Niger.

The most-likely scenarios for the October 2010-March 2011 Outlooks are based on the following assumptions regarding future events likely to have a significant impact on food security among the poor at a regional and national scale:

- Tabaski (Eid El Kebir) and Christmas will take place in November and December. These events correlate with high meat demand (and therefore high livestock prices), as well as high cereal supply, people sell cereals to get cash to meet holiday food and non-food needs. Livestock prices are likely to peak in November. Livestock-to-cereal terms of trade will be above-normal for the October-December period and highly favorable to households selling animals.
- Campaigns for the presidential, state and local elections, which are scheduled for the first quarter of 2011, will be ongoing between November-March. Gifts of cereals and transportation are common during election campaigns. Increased demand could increase prices of these goods and exert pressure on household expenses for those poor households who must travel or purchase food on markets, particularly in urban areas. Most civil servants during

Figure 3. Map of most-likely food security outcomes, October-December 2010



Source: FEWS NET

Figure 4. Map of most-likely food security outcomes, January-March 2011



Source: FEWS NET

the election campaigns will divert their time and energy to political activities. This may delay the implementation of food security programs needed in January, February, and March. Resources initially allocated for food insecurity mitigation could also be diverted to campaign activities. Such a use of time, energy and resources, will lead to a poor implementation of food assistance programs, weakening household coping capacity and leading to prolonged household recovery from the impact of the floods.

- The value of the Naira fell for the first time in 2010 from its peak of CFA 3.5 in August to CFA 3.2 in September in The value of the Naira compared to the FCFA is expected to remain stable (within five percent of September levels) during the period of the outlook, and will therefore not significantly influence trade flows.
- The flood-affected areas of the North and Extreme North account for less than 20 percent of the total cereal production in these regions in a normal year. Overall harvests in the region will be near normal in spite of flood-related crop losses.
- During the October March period, high numbers of migrants from Niger are not likely to enter Nigeria in search of labor opportunities as they did last year, as food security situation is expected be generally favorable in Niger. Abnormally early and high livestock transhumance from Niger to Nigeria similar to that of January-March 2010 is not likely in 2011 due to expected favorable pasture and water conditions in Niger's rangelands. Less pressure will be exerted on the labor market in Nigeria, allowing poor households better access to employment and improving household revenue. Lower livestock concentrations are expected in the rangelands of northern Nigeria, making access to pasture and water easier for Nigerian livestock.

Flood-affected areas of the North

The impacts of severe flooding in July and September are the most important determinants of food insecurity in Nigeria in 2010/11. In the basins of major rivers of the North and Extreme North, such as Sokoto Rima in Sokoto state and Hadejia River in Jigawa and Kebbi, excessive rains and sudden dam openings in September affected more than 390,000 people, destroying infrastructure and houses, household food stocks (normally low in September), and productive assets (particularly livestock). Approximately half of those affected will remain in shelters while others will live with relatives in October and November.

The assumptions about future conditions in these areas with the most impact on household food security are:

- Poor households who lost their equipment during the floods will not be able to engage in normal dry-season cultivation. Some will lose their land due to excessive soil erosion. Those who still have access to land will borrow money from rich and medium households to buy fertilizer and engage in dry-season cultivation.
- Road conditions, which are usually bad in October-November, will be worse than normal, leading to high transportation cost and delaying the arrival of cereal and cash crops, from farm gate to local and urban markets.
- The prevalence of cholera in 2010 is the greatest in almost 20 years. Incidence of waterborne diseases such as cholera and malaria will continue unseasonably in Jigawa, Sokoto and Kebbi beyond October and November.

Estimated production losses compared to normal in these areas are: 60 percent loss for rice, 40 percent for millet and sorghum production. The most-affected areas are those in which rice, millet and sorghum cultivation is most important; though cowpea losses were also recorded, they are less significant. Impacts on vegetable and maize production are minimal as the bulk of the vegetables and maize were harvested in August, before the floods occurred. Given that the flood affected areas, in Jigawa, Sokoto and Kebbi are high millet-, sorghum-, and rice-producing areas, which usually supply major markets, such as Dawanu in Kano, the delay in the arrival of these crops until late November and December instead of late October in a normal year, will keep millet and rice supplies abnormally low in October and November and market sorghum availability low in December, in urban and rural areas of Jigawa, Sokoto, Kebbi and surrounding states such as Katsina and Zamfara. Prices for coarse grains on the Kaura retail market in this area normally increase slightly (0-10 percent) between Late September/October and December. However, this year prices are expected to decrease less than normal between September-November and increase faster than normal during this period. Poor households will spend more than normal on food when they will start resorting to markets in March/April due to above-normal prices and an early exhaustion of their food reserve.

The flooding has destroyed about 50 percent of household productive assets in the affected area, including farm equipment and even land lost to erosion or shifting waterways. Therefore, though water availability is good, prospects for dry season

cropping in November and December are poor. The demand for local labor in riverine zones is also significantly below normal. In order to make up for these lost livelihood opportunities, able-bodied members of poor households will migrate to key cereal-producing areas nearby after leaving shelters in November. Some will become rural landless households, entirely dependent on labor for income and markets for food. The decreased demand for labor due to lost crops and increased supply of local labor from landed households will make it difficult for these households to earn enough money to eat from this strategy. Instead, they will sell firewood and charcoal or they will migrate to nearby cities in search of employment. These households will be abnormally vulnerable to small changes in market prices for millet, a major crop in the flood-affected area as early as November. They will be moderately food insecure during the November-March period.

FEWS NET expects the incidence of waterborne diseases, particularly cholera and malaria, to continue to increase significantly between September and October in the flood-affected areas of in Jigawa, Kebbi and Sokoto. As a result of these disease outbreaks, agricultural labor supply will drop by about 20 to 30 percent in cholera-affected areas of Bauchi, Gombe and Borno and in heavily flooded, malaria-endemic areas of Jigawa, Sokoto and Kebbi, as many able-bodied men become sick. The downward pressure on wages from the flood-induced reduction in agricultural activities and the upward pressure on wages as some households forego wage labor to care for sick children will lead to a near-normal equilibrium in the labor market. Households will face unexpected expenditures for health care, and those who stay at home to take care of their children will face losses in income usually derived from agricultural labor in October and November.

The government is responding to the needs of identified flood victims by providing basic hygiene supplies, potable water, blankets and food, covering a portion of their immediate needs for two or three months. However, food and non-food assistance to flood victims will cover only one-third of the estimated annual household food gap among the poor this year. No plan for full recovery of the flood victims' livelihood is expected; as such, households able to return to farming are unlikely to return to normal consumption patterns until the harvest in October 2011.

Poor households in riverine areas of Sokoto and Kebbi will be food secure from October to March period, as the combined impact of own production food assistance and coping mechanisms will cover their food needs. In Jigawa, however, where the magnitude of flooding and the geographical extent are higher and where poor households have limited resilience and weaker coping mechanisms, poor households will become moderately food insecure beginning in January due to an earlier-than-normal dependence on markets and above-normal food prices.

The 2010 lean season was more severe than normal **among pastoral households in the North**, and recovery has been slowed in localized areas of northern Yobe and Borno by poor fodder production, due to extended dry spells in August and an early cessation of rains in early September. The abnormally slow improvement in pastoral household food and cash sources and livestock-to-cereal terms of trade in October is slowing recovery as goat and sheep prices, which usually increase up to 30 percent from September to October, have increased only by 10 to 15 percent to reach between NGN 3,000 to NGN 3,800 in the areas most affected by the impacts of the dry spell and the early cessation of rains such as Geidam, in northern Yobe.

In most parts of the rangelands of north, most pastoral households will stay near homestead, during the October-March period, which is consistent with seasonal trend. Fodder and water resources will be favorable during October-March in the pastoral rangelands of the North, leading to 50-percent increase in milk availability in October, November and December, when compared to August and September. Milk contributes significantly to both income and food sources for the majority of poor pastoral households between August and December. In few areas of northern Yobe and Borno, where the season ceased abruptly and fodder production is below normal, milk yields will begin drop in December instead of January as is normal. Pastoral households will move southward in search of better pastures in January and February, instead of April, as in a normal year. The absence of livestock at homestead will lead to a 60 percent reduction in milk intake between February and April among women, children and elderly who stay behind. The early transhumance to the South will also result in a 30 to 40 percent reduction in milk supply compared to normal in urban areas of the extreme north, leading to a rise in the price of milk, which will compensate slightly for consumption losses through improved purchasing power.

In localized areas of the millet, cowpea and sorghum livelihood zone, stretching horizontally from northern Borno to Northern Yobe, an abnormally long dry spell in August, followed by an early cessation of rains in early September, will lead to a drop in millet, sorghum, and cowpea production by 10 to 15 percent when compared to an average year. Household food stocks will be 15 percent lower than normal in 2010/11. Given the limited geographical extent and magnitude of these

shocks, most poor households will be able to meet their basic food needs without external assistance through the intensification of agricultural-based labor and remittances and the favorable market conditions in most of the North during the outlook period.

In the South, the month of October is normally one of high yam, maize, and cassava supply at market and household level. However, as a result of excessive rains in localized areas in the coastal states of Bayelsa, Rivers, Cross Rivers, and Lagos in July and September, the following assumptions govern the October 2010-March 2011 most-likely scenario.

- Heavy losses of the second October/November maize and yam harvest among poor households are expected.
- High humidity in September and October due to incessant rains will delay maize drying for 3 to 4 weeks and spoil some of the cassava harvest.
- Water levels are high in local rivers, reducing fish availability in these water points and making access to fish unusually difficult for this period of the year.

Slow drying and spoilage due to slow drying will lead to reductions in cassava and maize supplies in markets and at household levels during the November-March period. As a result, prices for maize and *gari*, which normally increase 15-20 percent between October and March (on Bodija/Ibadan market), will likely increase more steeply than normal. Maize crop losses will lead to exhaustion of household food reserves in February, two months before the normal onset of the normal lean season in the South.

Excessive flooding destroyed fish ponds and caused water levels in most rivers to rise, in September, reducing the quantity of fish available in local water points, in October and November, and constraining household access to their main source of protein. Fish prices will rise by 20 to 30 percent, in October and November, when prices usually drop. In some livelihood zones, where fishing is a major source of income for the poor, such as the southern parts of Rivers, Akwa Ibom and Delta, poor households will sell these limited quantities of fish at high prices, offsetting the reduction in fish availability. Most poor households will cope through substitution of yam and maize with *gari*, for which prices are 50 to 60 percent lower than their five-year average in October. Access to *gari* and cocoyam will limit food insecurity until January when supplies decline due to normal consumption and industrial purchases and prices climb, pushing these households into the moderately food insecurity category.

The excessive flooding in Jigawa, Sokoto and Kebbi led to a significant deterioration of roads. The normal sorghum and cowpea inflow from these areas to southern markets, which usually peaks in October and November, will be hampered this year by high transportation costs. This will prompt sorghum and cowpea (another important source of protein for the poor) supply in the south to drop and prices to rise by 15 to 20 percent, making access to their sources of food and protein difficult to the poor.

Civil insecurity, which is currently a major concern in the South East, will worsen slightly beginning in November and peaking between January and March, the end of the presidential and state election period. Bayelsa, Rivers, Delta, Akwa Ibom, Edo, and Cross River states will be most affected. A sharp rise in civil insecurity in the form of armed robbery, kidnapping, and political assassination is expected to will slightly disturb market activities, harvest in November and December, land preparation in January and February and plating in late March. Oil pipelines will be vandalized, causing significant oil leakage in rivers and ponds and limiting fishing for consumption and sale during the October March period.

Table I. Less likely events over the next six months that could change the above scenarios.

Area	Event	Impact on food security outcomes
National	The naira appreciates significantly vis-a-vis the CFA	Cross border trade with Cameroun and Chad in the East, Benin in the South, and Niger in the North will strengthen, as soon as October, improving food availability and food access for the poor more than expected.
Extreme North	Nigerian traders will search for millet supply in the Niger Republic, where production was better and prices may be lower	Imports of millet, from Niger will increase millet supplies, in flood affected areas of Kebbi, Jigawa and Sokoto, during the January February period, preventing millet abnormal increases in millet prices.
South	Steps are taken to curb violence in the South in anticipation of the 2011 elections, including successful negotiations with the Niger Delta militants (full implementation of the Niger Delta amnesty agreement).	Violence is averted during the November March period, allowing households to engage in commercial and agricultural activities aimed at mitigating food insecurity. Households' coping mechanisms are strengthened, allowing them to meet most of their needs without external assistance. Markets could react positively to a perception of free-and-fair presidential elections during the first quarter of 2010 , exhibiting low food and non food prices.