



GIEWS Country Brief Nigeria

Reference Date: 14-August-2024

FOOD SECURITY SNAPSHOT

- About 31.8 million people estimated to be acutely food insecure during the 2024 lean season
- Overall favourable production prospects for 2024 main season maize crop
- Below-average cereal production in 2023
- Prices of cereals at exceptionally high levels

About 31.8 million people estimated to be acutely food insecure during the 2024 lean season

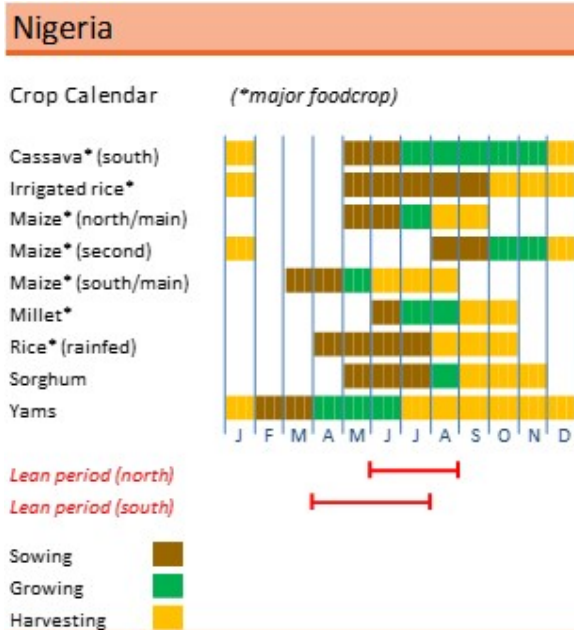
According to the March 2024 *Cadre Harmonisé* (CH) analysis, nearly 31.8 million people are estimated to face acute food insecurity (CH Phase 3 [Crisis] and above) during the June to August 2024 lean season period, including over 999 000 people in CH Phase 4 (Emergency). This is well above the approximately 24.9 million people estimated to be in need of humanitarian assistance during the same period in 2023. The severe deterioration of the food security situation is due to a multidimensional crisis driven by worsening conflict, the persistent macroeconomic crisis and high food prices.

Conflict continues to drive acute food insecurity in the country's North-East, North-West and North-Central zones, with the first half of 2024 witnessing a significant increase in the number of violent events and fatalities compared to the same period in 2023. Insecurity has severely disrupted markets and livelihoods and has caused large population displacements. In June 2024, about 3.4 million people were estimated to be internally displaced. Humanitarian access constraints remain very high, in particular in Borno, Adamawa and Yobe states, where about 45 percent of the people estimated to be in CH Phase 4 is located and several localities remain inaccessible.

The persistent macroeconomic crisis has resulted in a high inflation rate that reached 34.2 percent in June 2024, the highest level in 28 years, with consequent negative impact on access to food for vulnerable households across the country.

Overall favourable production prospects for 2024 main season maize crop

In southern bimodal rainfall areas, harvesting of the main season maize crop is ongoing and is expected to conclude in August.



Nigeria

Cereal Production

	2018-2022	2022	2023	change
	average		estimate	2023/2022
	000 tonnes			percent
Maize	12 691	12 949	11 053	-14.6
Rice (paddy)	8 387	8 584	8 902	3.7
Sorghum	6 702	6 806	6 402	-5.9
Others	2 077	2 135	1 754	-17.9
Total	29 857	30 475	28 111	-7.8

Note: Percentage change calculated from unrounded data.

Overall production prospects are favourable, reflecting generally good weather conditions. However, in some areas, in particular in Adamawa State, precipitation amounts have been below average since the start of the season, hindering plantings and leading to crop wilting and stunting. According to FAO's Agricultural Stress Index (ASI), as of end-July 2024, between 40 to 85 percent of cropland in these areas was affected by drought conditions (red, orange and yellow areas on the ASI map).

In northern unimodal rainfall areas, sowing finalized last July. Cumulative rainfall amounts were near average between April and July, supporting planting operations and the early development of crops. However, in localized areas, torrential rains triggered floods, which disrupted sowing activities. Compared to the previous year, a decline in the area planted has been reported in several conflict-affected areas in northern regions, primarily due to farmers' limited access to land.

Across the country, high input prices and low household purchasing power are constraining agricultural activities, with a likely negative impact on yields.

According to the latest weather forecast by the Forum on Seasonal Forecasts of Agro-hydro-climatic Characteristics of the Rainy Season for Sudanian and Sahelian Zones of West Africa (PRESASS), average to above-average rainfall amounts are expected in northern areas in August and September, likely benefitting crops. However, the expected abundant rainfall amounts may result in flash floods and river overflows, with ensuing localized crop losses. By contrast, average to below-average precipitation amounts are expected in southern areas.

Below-average cereal production in 2023

The 2023 aggregate cereal production is estimated at 28.1 million tonnes, about 5 percent below the five-year average and about 8 percent below the previous year's level. Dry spells, limited access to fields due to insecurity and high costs of agricultural inputs, which led to a decrease in planted area, resulted in a reduced cereal outturn.

Prices of cereals at exceptionally high levels

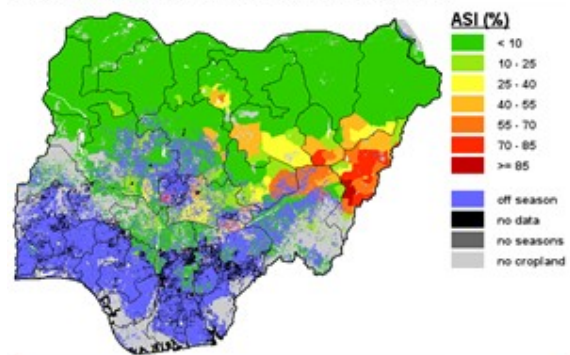
Wholesale prices of locally produced rice and sorghum rose by 30-75 percent between December 2023 and May 2024, while prices of maize and millet increased between 45 and 60 percent during the same period. Prices of local cereals were at record levels in most markets in May 2024, more than double their year-earlier values.

Wholesale prices of imported rice decreased in most markets in April and May 2024, after a period of sustained increases since July 2023. However, prices in May 2024 were still very high, about double the year-earlier levels, partially due to the elevated international prices of rice following the adoption of an export ban of non-basmati white rice in India in July 2023.

The high domestic prices of cereals reflect the weakness of the national currency (Naira), high transport costs and conflict-related market disruptions. Furthermore, strong local demand, combined with the strategy to hold stocks by traders and farmers due to unfavourable production prospects given the poor rainfall in some areas at the start of the 2024 rainy season, contributed to the high prices.

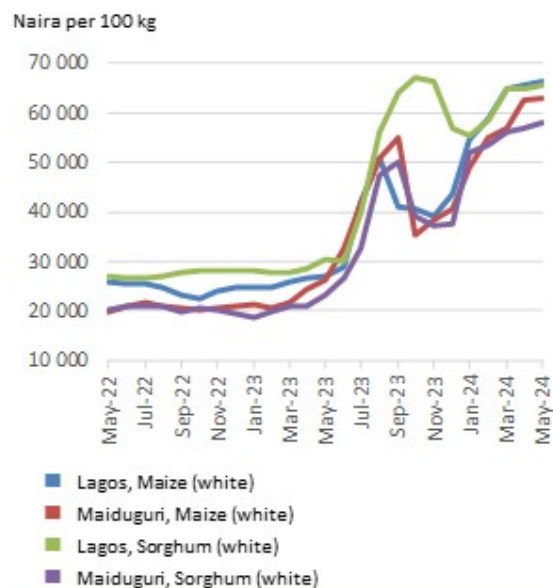
Nigeria - Agricultural Stress Index (ASI)

from start of season 1 to dekad 3, July 2024



Nigeria

Wholesale prices of maize and sorghum



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This brief was prepared using the following data/tools:

FAO/GIEWS Country Cereal Balance Sheet (CCBS) <https://www.fao.org/giews/data-tools/en/>.

FAO/GIEWS Food Price Monitoring and Analysis (FPMA) Tool <https://fpma.fao.org/>.

FAO/GIEWS Earth Observation for Crop Monitoring <https://www.fao.org/giews/earthobservation/>.

Integrated Food Security Phase Classification (IPC) <https://www.ipcinfo.org/>.



GIEWS Country Brief The Federal Republic of Nigeria

Reference Date: 13-June-2023

FOOD SECURITY SNAPSHOT

- **Over 24.8 million people projected acutely food insecure in 2023**
- **Mixed performance of 2023 seasonal rains**
- **Cereal production in 2022 estimated at near-average level**
- **Prices of cereals higher year-on-year**

Over 24.8 million people projected acutely food insecure in 2023

According to the March 2023 “Cadre Harmonisé” (CH) analysis, over 24.8 million people are projected to face acute food insecurity (CH Phase 3 [Crisis] and above) between June and August 2023, including about 1.1 million people in CH Phase 4 (Emergency). In areas analysed in both 2022 and 2023, the prevalence of acutely food insecure people is expected to increase from 12-14 percent.

Since over a decade, the country has been facing multiple security challenges, which is affecting food access. In the northeast, fighting between non-state armed groups and military forces escalated in the first quarter of 2023, while in northwest and northcentral states, banditry, kidnapping and cattle rustling increased and expanded to new areas between March and May. Poor security conditions have severely disrupted markets and livelihoods, while persistent macroeconomic challenges have compounded food security conditions of vulnerable households.

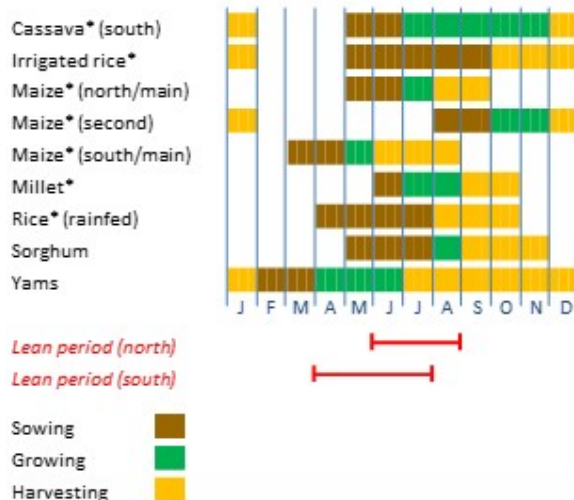
Insecurity also continued to cause large population displacements. In April 2023, nearly 3.6 million people were estimated to be internally displaced, an increase of about 15 percent compared to the same period in 2022.

Humanitarian access constraints remain very high, in particular in Borno, Yobe and Adamawa, where a major part of the people, expected to be in CH Phase 4 (Emergency), is located and several local government areas are totally or partially inaccessible.

Nigeria

Crop Calendar

(*major foodcrop)



Nigeria

Cereal Production

	2017-2021 average	2021	2022 estimate	change 2022/2021
	000 tonnes			percent
Maize	12 502	12 744	12 735	-0.1
Rice (paddy)	8 238	8 342	8 502	1.9
Sorghum	6 627	6 726	6 742	0.2
Others	2 034	2 101	2 225	5.9
Total	29 401	29 913	30 203	1.0

Note: Percentage change calculated from unrounded data.

Mixed performance of 2023 seasonal rains

The performance of the 2023 rainy season was mixed between March and May. In southern bimodal rainfall areas, seasonal rains had a timely onset and, in most parts, near-average accumulated rainfall amounts favoured crop development. Harvesting of maize in southern areas is ongoing and is expected to conclude by August. In central areas, rains also started on time, but rainfall amounts received in May were below average in many parts. In northern areas, seasonal rains are expected to start in the weeks ahead. Despite constraints due to insecurity, which hampers farmers' access to their fields, as well as limited financial access to agricultural inputs, land preparation and planting activities are underway.

Weather forecasts for the June to September period point to average to above-average rainfall amounts in northern and northeastern areas. Western parts are likely to experience riverine flooding due to the high probability of above-average rains in the Niger basin. Conversely, central and southern areas are at risk of below-average rainfall.

Cereal production in 2022 estimated at near-average level

The aggregate cereal production in 2022 is estimated at 30.2 million tonnes, near the previous year's average level. Widespread floods in 2022 disrupted agricultural livelihoods across the country and caused significant crop losses. Assessments indicate that in 15 of the most flood-affected states, about 768 000 hectares of farmland were destroyed. Furthermore, insecurity hampered agricultural activities and caused localized production shortfalls.

Prices of cereals higher year-on-year

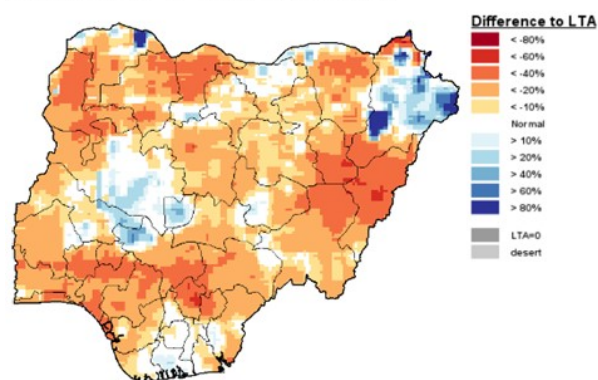
Wholesale prices of locally produced millet and maize rose seasonally in March and April 2023 (latest available data), with the most pronounced increases recorded in markets located in the conflict-affected areas, including the towns of Giwa and Maiduguri. Across the country, prices of millet in April were 5-10 percent above their year-earlier levels, while prices of maize were between 5 and 20 percent higher year-on-year. Wholesale prices of local sorghum showed mixed trends in recent months and were near their elevated year-earlier levels in April.

Wholesale prices of locally produced rice generally increased in April. Despite the slightly above-average domestic rice output in 2022, prices were 20-35 percent higher year-on-year. By contrast, prices of imported rice decreased slightly in April, but they remained 30-40 percent above their year-earlier levels.

Food inflation increased steadily since early 2022 and reached an annual rate of 24.6 percent in April 2023. The high inflation level reflects market disruptions due to insecurity as well as elevated production and transport costs. High food prices were also supported by persistent shortages of cash and depreciation of the national currency (naira), in particular on the parallel

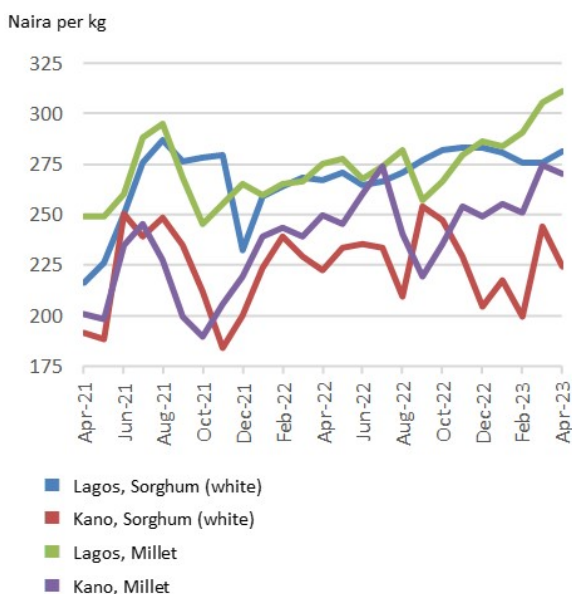
Nigeria - Precipitation anomaly

Relative difference to LTA, May 2023



Nigeria

Wholesale prices of selected cereals



market. In May, USD 1 was traded for NGN 745, compared to NGN 461 on the official market.

If the fuel subsidy would be removed, prices of food and other essential goods are expected to further increase due to higher costs of production and transport. The government's announcement of its intention to remove the fuel subsidy has already driven panic-buying and spikes in fuel prices.

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GIEWS Country Brief Nigeria

Reference Date: 28-September-2022

FOOD SECURITY SNAPSHOT

- Cereal production in 2022 affected by flooding, high production costs and conflicts
- Cereal import requirements forecast near average in 2022 marketing year
- Prices of coarse grains near or above year-earlier levels
- Unprecedented 19.5 million people estimated to face acute food insecurity

Cereal production in 2022 affected by flooding, high production costs and conflicts

Harvesting of the 2022 main season crops, mostly maize, was completed in August in the south. In the rest of the country, harvesting of rice, millet and sorghum crops is underway and it is expected to conclude in January 2023.

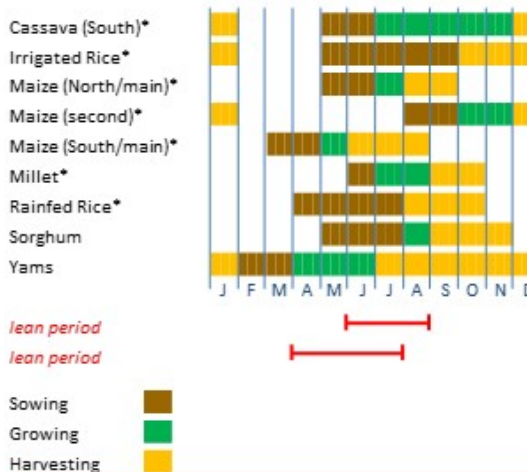
The 2022 rainy season had a timely start, with the onset of the rains in March in southern states and in June in northwestern, and northcentral states, which supported planting activities and crop establishment. In the northeast, however, below-average rains in June caused delays to plantings. Subsequently, average to above-average rainfall amounts between July and September supported crop development across most of the country. Although the abundant rainfall was beneficial to crops, flooding occurred between June and September in riverine areas in central and northeastern states, causing disruptions to livelihoods and losses of productive assets. According to a recent assessment by the World Food Programme, about 640 000 hectares of crops were affected by the floods as of mid-September.

In northwestern and northcentral states, rising insecurity restricted farmers' access to fields and hampered agricultural activities, limiting the extent of planted area with cereal crops and yields expectations. In the northeast, a decrease in the number of violent incidents led to an increase in the number of farmers cultivating land. However, remote sensing data indicates below-average vegetation conditions, mostly due to the erratic distribution of rains and a reduced use of agricultural inputs. Amid higher prices of fuel and fertilizers, farmers' ability to purchase inputs has been limited in 2022 as their financial resources have been significantly diminished by years of insecurity that reduced their incoming-earning opportunities.

Nigeria

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Nigeria

Cereal Production

	2017-2021 average	2021	2022 forecast	change 2022/2021
	000 tonnes			percent
Maize	12 463	12 445	12 000	-3.6
Rice (paddy)	8 238	8 342	8 000	-4.1
Sorghum	6 723	6 620	6 500	-1.8
Others	2 037	2 085	2 000	-4.1
Total	29 461	29 492	28 500	-3.4

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Reflecting the expected production shortfalls driven by the floods, low application of agricultural inputs and conflict-related disruptions, national cereal production, mostly maize, rice and sorghum, is preliminarily anticipated to be slightly below the average level of 28.5 million tonnes.

Cereal import requirements forecast near average in 2022 marketing year

The country relies significantly on imports of cereals, mostly of wheat and rice, to cover its domestic requirements. In the 2022 marketing year (January/December), cereal import requirements are forecast at a near-average level of 8.1 million tonnes. This includes 5.5 million tonnes of wheat, a near-average level but 15 percent below the previous year's high level, when growth of the bakery sector, driven by strong local demand for bread, pushed up wheat imports. Imports of rice are forecast at 2.5 million tonnes, slightly above the previous year's level and the five-year average.

Prices of coarse grains near or above year-earlier levels

Prices of coarse grains strengthened between November 2021 and February 2022. Between March and July 2022, the upward pressure eased and prices of maize and sorghum generally held steady or decreased, underpinned by the harvest of maize crops in southern areas and the commercialization of stocks. Prices of millet increased during the same period, ahead of the harvest due to start in September. Prices of coarse grains were near their year-earlier levels in southern markets, while they were up to 15 percent higher year on year in northeastern and northcentral states, supported by poor security conditions, strong demand and high transportation costs.

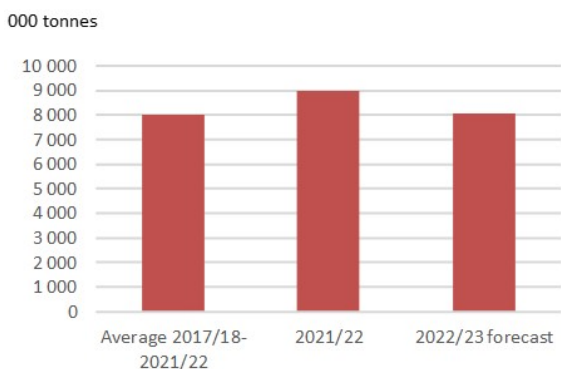
Food inflation increased steadily in 2022 and reached an annual rate of 23 percent in August 2022. The high inflation level reflects market disruptions, mostly related to insecurity in the north, increased production costs and high prices of fuel, and imported food products, supported by increasing trends in international markets and a significant currency depreciation. In August 2022, the naira was equivalent to NGN 422/USD 1 on the official market, compared to NGN 410/USD 1 one year before, while it depreciated by nearly 70 percent on the parallel market, falling to about NGN 700 /USD 1.

Unprecedented 19.5 million people estimated to face acute food insecurity

According to the latest available "Cadre Harmonisé" analysis carried out in March 2022, the number of people facing acute food insecurity (CH Phase 3 [Crisis] and above) was estimated at about 19.5 million between June and August 2022, including 1.2 million in CH Phase 4 (Emergency). This is the highest number on record and well above the 12.8 million people estimated to be food insecure during the same period in 2021. The sharp increase in food insecurity levels reflects both an expansion of the geographical coverage of the CH analysis and a deterioration of conditions in northwestern, northcentral and southeastern states, underpinned by insecurity and conflicts, below-average market supplies and high food prices. A significant number of people in CH Phase 4 (Emergency) in the northeastern states of Adamawa, Borno and Yobe are located in

Nigeria

Cereals Imports

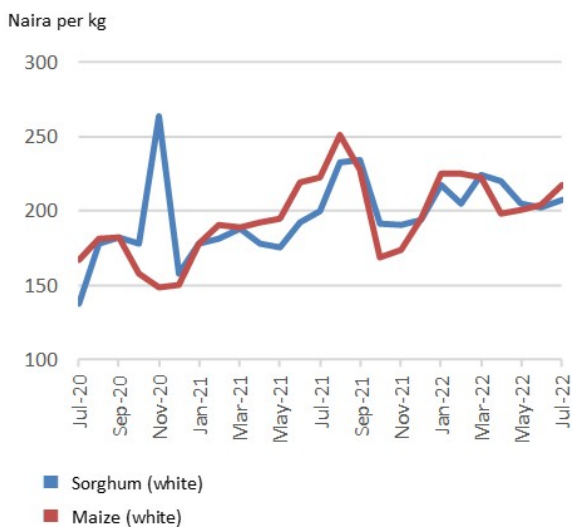


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Nigeria

Selected wholesale cereal prices in Maiduguri



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

areas inaccessible or hard to reach by humanitarian assistance.

The poor insecurity conditions in northwestern and northcentral states, and insurgent violence in northeastern states, have continued to disrupt agricultural livelihoods and markets in 2022, causing large-scale displacements. As of July 2022, the number of estimated internally displaced persons in northeastern states was 2.5 million and in northwest and northcentral states was 1 million.

However, the actual number of food insecure people is likely to be higher than the current estimates, which were produced prior to the start of the war in Ukraine. Food availability and access are estimated to be worse than previously foreseen due to the unfolding effects of the war on international trade and commodity prices, which are compounded by national macroeconomic challenges. These include, currency depreciation, low foreign exchange reserves and a widening fiscal deficit, mostly underpinned by a higher bill for fuel subsidies and reduced domestic production of crude oil. High inflation, monetary tightening and disruptions of power supply, are expected to slow down economic growth in 2022, reducing income-generating opportunities for the most vulnerable. In addition, according to the United Nations Office for the Coordination of Humanitarian Affairs (OCHA), flash floods have affected, as of September 2022, about 190 000 people in the areas already affected by high levels of food insecurity, malnutrition and violence in northeastern states. New CH estimates of the number of people facing acute food insecurity in the last quarter of 2022, are expected to be released next November by the Permanent Interstate Committee for Drought Control in the Sahel (CILSS).

In order to boost food consumption and income-generating opportunities, FAO is supporting farmers in northeastern states for the cultivation of groundnut and cowpea crops.

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GLEWS Country Brief Nigeria

Reference Date: 04-January-2021

FOOD SECURITY SNAPSHOT

- Slightly above-average cereal production gathered in 2020
- Cereal import requirements estimated slightly above average in 2020/21 marketing year
- Prices ease with new supplies from recent harvest, but remain at high levels
- Weak economic growth projected, food price inflation increasing
- About 9.8 million people estimated severely food insecure in 2020 post-harvest period

Slightly above-average cereal production gathered in 2020

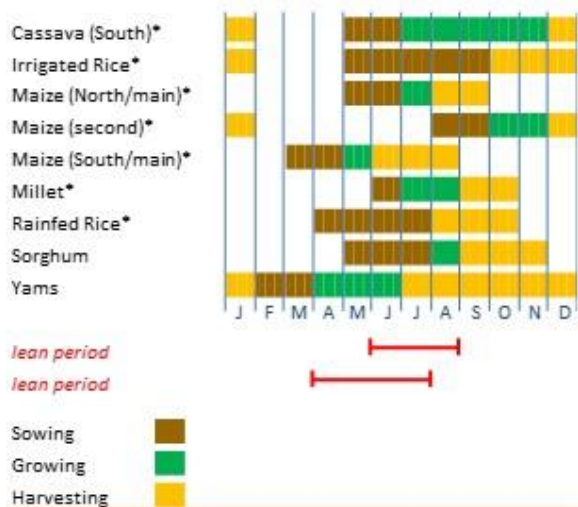
Harvesting activities of millet, sorghum, rainfed rice and main season maize crops have almost finalized, while harvesting of irrigated rice and second season maize crops is still ongoing and will be completed by end-January. Despite the conflict in the northern areas and the impacts of the COVID-19 pandemic, favourable rains in 2020 benefitted crop development in most parts of the country. The country's aggregate cereal output in 2020 is estimated at 28 million tonnes, slightly above the last five-year average, but below the 2019 production record.

Early and extended rainfall favoured abundant quality pasture and water resources for livestock in the main grazing areas of the country. Crop residues from the main harvest are also increasing fodder availability in most parts of the country. The national forage production in dry matter content is estimated at about 6.3 million tonnes, 7 percent above the last five-year average. The animal health situation is generally favourable, with only seasonal disease outbreaks recorded in some areas, including Contagious Bovine Pleuroneumonia (CBPP), Peste des petits ruminants (PPR), African Swine Fever (ASF), Gumboro (Infectious Bursal Disease - IBD), New Castle Disease (NCD) and Helminthiasis. However, the persisting conflict in northern areas and clashes between farmers and pastoralist in northcentral and northwestern areas continue to limit the access to grazing resources and herds started earlier than usual to move southwards in January. In addition, pastoralist transhumance from Niger, Chad and Cameroon is expected to remain significantly limited due to border closures, persistent conflict and cattle rustling incidences, theft and banditry along the borders.

Nigeria

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Nigeria

Cereal Production

	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	11 136	12 700	12 000	-5.5
Rice (paddy)	8 060	8 435	8 172	-3.1
Sorghum	6 362	6 665	6 362	-4.5
Others	1 786	2 072	1 778	-14.2
Total	27 344	29 872	28 312	-5.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Cereal import requirements estimated slightly above average in 2020/21 marketing year

In addition to the trade restrictions introduced in 2015 to increase local production, the Government decided to close the borders since August 2019 in order to stop illegal inflows of rice and maize from neighboring countries, with the aim to accelerate domestic crop production. However, the country continues to rely significantly on imports of crops, including rice and wheat, to cover its domestic requirements. The aggregate import requirement of cereals in the 2020/21 marketing year (November/October) is estimated at 7.25 million tonnes, slightly above the five-year average and similar to the previous year's level.

Prices ease with new supplies from recent harvest, but remain at high levels

Prices of coarse grains started their seasonal decline in October due to the arrival on the markets of new supplies from the 2020 harvest. However, prices remained at high levels and were higher than their year-earlier values, mainly due to the effects of the measures to contain the COVID-19 pandemic on the supply chain and the unfavourable macro-economic conditions, including the high inflation rate and the continued depreciation of the local currency. The situation is compounded by localized production deficits, coupled with the strong domestic demand to supply local factories for beverages and animal feed production. In addition, the situation is exacerbated by the persisting conflict in the northeast part of the country, where prices were up to twice their year-earlier values.

Weak economic growth projected, food price inflation increasing

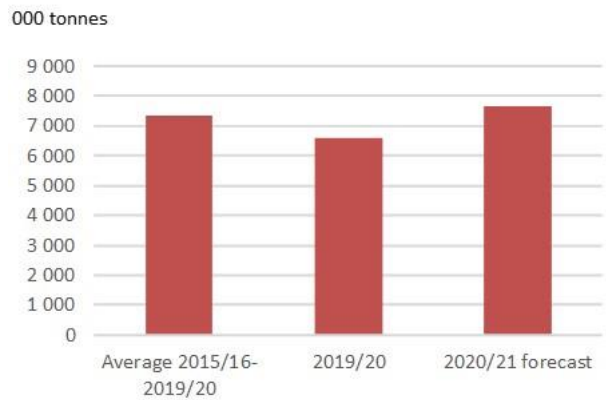
The economic recession continues in the country, characterized by a negative growth rate of 6.10 percent in the second quarter and 3.62 percent in the third quarter of 2020. Current macro-economic conditions are mainly driven by the low global crude oil prices on the international market and the impacts of the COVID-19 pandemic. In addition, according to the National Bureau of Statistics, the food inflation rate has progressively increased since late 2019, reaching 18.3 percent in November 2020, the highest level in about three years. Moreover, the Naira continued to depreciate from NGN 461/US dollar in October 2020 to NGN 482/US dollar in November 2020. The situation is also exacerbated by recent social protests, further limiting economic activities.

About 9.8 million people estimated severely food insecure in 2020 post-harvest period

According to the October 2020 "Cadre Harmonisé" analysis, about 9.8 million people are estimated to be in need of external food assistance from October to December 2020, a significant increase from the estimated 4 million people in same months in 2019. The situation is expected to deteriorate at the peak of the next lean season, between June and August 2021, when close to 14 million people are expected to require assistance, if no mitigation actions are taken. The higher prevalence of food insecurity mainly reflects the adverse effects of the measures to contain the COVID-19 pandemic on the supply chain, the escalation of armed and community conflicts, some localized

Nigeria

Cereals Imports

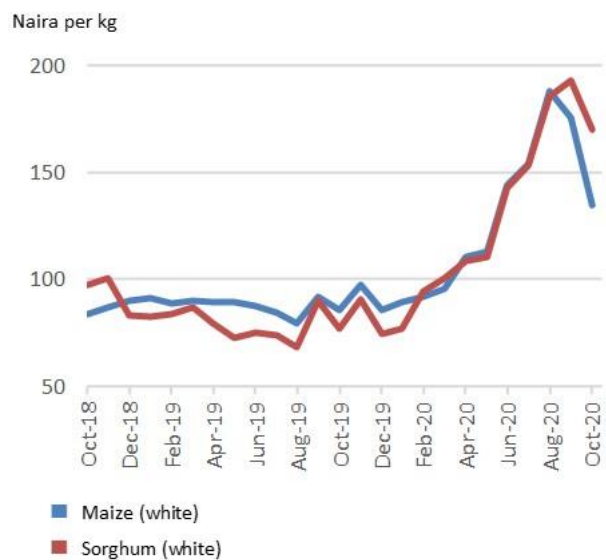


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Nigeria

Selected wholesale cereal prices in Kano



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

cereal production shortfalls in 2020, the unfavourable macro-economic conditions and high food prices. The areas most affected by food insecurity are Adamawa, Borno and Yobe states.

In particular, the food security situation has worsened in recent months mainly due to the upsurge of violence between armed groups and communal conflicts, driving new population displacements, especially in the Northeast, Northwest and Northcentral regions. Most of the affected households are unable to carry out their livelihood activities, including petty trade and unskilled labour restricting their purchasing power. In addition, the well above-average staple food prices are limiting market food access. As a result, many affected households continue to experience high levels of food insecurity, especially in the most inaccessible areas. According to the latest FAO-WFP Early Warning Analysis of Acute Food Insecurity Hotspots, famine is likely to occur in the northeast in the event of continued heightening levels of insecurity which could heavily constrain humanitarian access. As of August 2020, the International Organization for Migration (IOM) identified over 2.7 million people that have been displaced due to the insurgency in the northeastern states of Adamawa, Borno and Yobe, to communal clashes in Northwest/Northcentral and flooding across northwestern and northcentral parts of the country.

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GIEWS Country Brief Nigeria

Reference Date: 08-October-2020

FOOD SECURITY SNAPSHOT

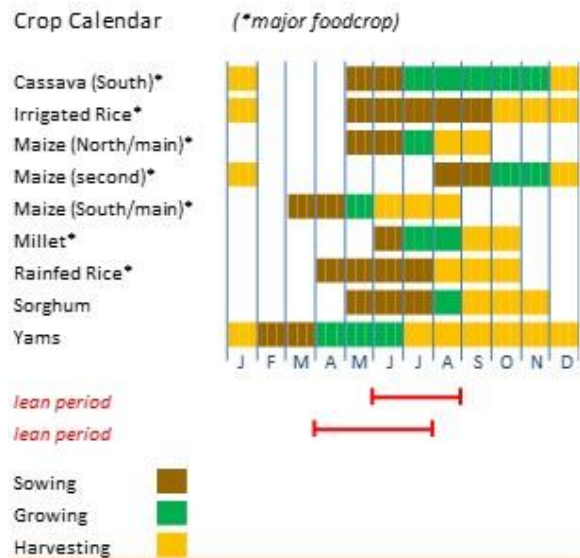
- Extremely elevated price levels recorded in July
- Cereal import requirements forecast at below-average level
- Extremely high food prices registered in July in most markets
- Increased external assistance needs in 2020

Cereal production in 2020 estimated at slightly above-average level

Harvesting of the 2020 main season maize crop was completed in August in the south, while it is still ongoing in the rest of the country for rice, millet and sorghum crops. Following a timely onset of seasonal rains, planting activities started in February/March in the south and in May/June in the north. The cumulative precipitation amounts were above average in most areas since the beginning of the season, favouring crop germination, establishment and development as well as improved vegetation conditions (see ASI image). However, in September, below-average rainfall and moisture deficits are impacting main season cereals in northwestern parts of the country. Moreover, flooding across northwestern and northcentral parts of the country due to heavy rains in July and August, coupled with the widespread high levels of conflict in the northern areas and the effects of restriction measures due to the COVID-19 pandemic, had a negative impact on yields, curbing production prospects. In addition, localized Fall Army Worm (FAW) attacks were reported, with high presence in Adamawa State. Overall, the 2020 cereal crop production is estimated at slightly above the last five-year average.

The abundant rainfall in July and August boosted natural pasture conditions and contributed to replenish surface water, improving livestock body conditions and enhancing their market values. The animal health situation is generally stable, with only small seasonal outbreaks of epizootic diseases, including Trypanosomiasis in northern parts of the country. However, in the northern parts of the country, pastoralist production systems are still affected by armed and community conflicts, theft and banditry. As a result, a higher concentration of animals is expected in the areas less affected by insecurity, with a consequent rapid degradation of fodder and water resources.

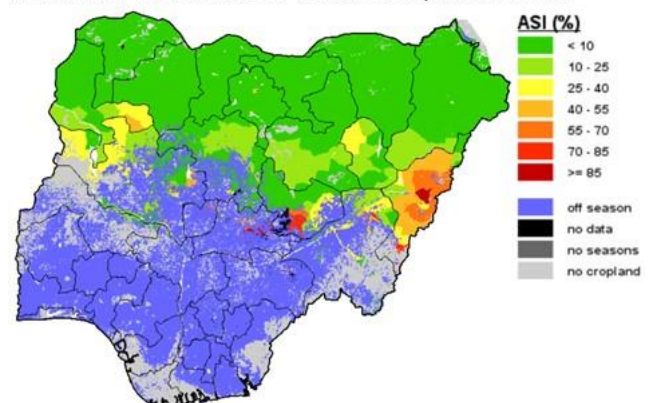
Nigeria



Source: FAO/GIEWS, FEWSNET.

Nigeria - Agricultural Stress Index (ASI)

from start of season 1 to dekad 2, September 2020



Source: FAO/GIEWS Earth Observation System.

Favourable rainfall and the adequate supply of inputs by the Government and several NGOs in 2019 benefitted crop production in most parts of the country. Despite some pockets of drought and some FAW outbreaks, the 2019 national cereal production is estimated at about 30 million tonnes, 16 percent above the previous five-year average.

Below-average import requirements forecast

Despite the trade restrictions introduced since 2015 by the Government, the country relies on imports of crops, including rice and wheat, to cover its domestic requirements. Following the above-average 2019 production, cereal import requirements for the 2019/20 (November/October) marketing year are forecast at a below-average level of 7.1 million tonnes.

Extremely elevated food prices registered in July in most markets

Prices of coarse grains continued to increase significantly in most markets in the past few months, supported by the effects of the restrictive measures implemented to contain the COVID-19 pandemic and strong domestic demand. The situation is exacerbated by the closure of the borders with neighbouring countries, implemented since August 2019 to curb the smuggling of imported rice and maize. In addition, the continued depreciation of the local currency, the decline in foreign reserves and the high general inflation rate, coupled with high transportation costs due to the 20 percent increase in petrol prices in July, have contributed to the atypical price spikes. As of July, prices of all cereal products were at least 50 percent higher than their year-earlier values, with peaks in the conflict-affected areas of the northeast due to the impact of persistent insecurity.

Increased external assistance need in 2020

According to the March 2020 "Cadre Harmonisé" analysis, without considering the effects of the COVID-19 pandemic, about 7 million people were estimated to be severely food insecure during the lean season between June and August 2020, well above the about 5 million food insecure people estimated in the same period in 2019. The main drivers for the significant increase in the number of people in need of assistance are some localized cereal production shortfalls in 2019, the escalation of armed and community conflicts and high inflation rates. The areas most affected by food insecurity are Borno and Yobe states, where over 2 million people are food insecure. However, the current situation is worse than expected as the COVID-19 containment measures adversely affected households' livelihood activities and incomes, especially in urban areas.

Recent attacks by Boko Haram insurgents and military operations across the northeast continue to hinder the agro-pastoral and seasonal livelihood activities, including access to fields. This is resulting in increased displacement, humanitarian needs and food insecurity. Heavy rainfall in July and August resulted in localized flooding in Kaduna, Katsina, Zamfara, Sokoto, Kebbi and Niger states, affecting thousands of people and causing human casualties, loss of livelihoods and damage to crops, livestock and infrastructures. As of August 2020, the International Organization for Migration (IOM) identified over 2.7 million people that have been displaced due to the insurgency in the northeastern states of Adamawa, Borno and Yobe, due to communal clashes in North-West/North-Central and to natural

Nigeria

Cereal Production

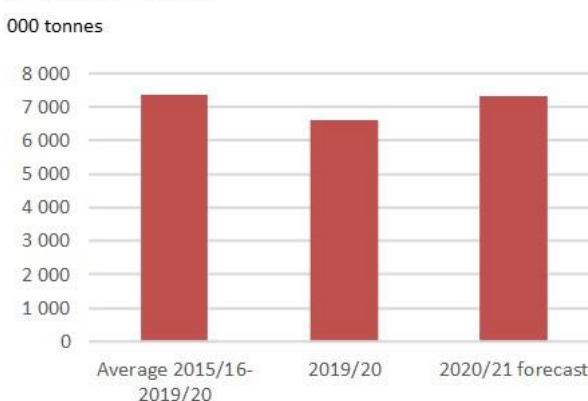
	2015-2019 average	2019	2020 forecast	change 2020/2019
	000 tonnes			percent
Maize	11 136	12 700	12 000	-5.5
Rice (paddy)	8 060	8 435	8 520	1.0
Sorghum	6 362	6 665	6 362	-4.5
Others	1 786	2 072	1 778	-14.2
Total	27 344	29 872	28 660	-4.1

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Nigeria

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

disasters. Most displaced households have limited income and mostly rely on humanitarian assistance to cover their basic needs.

Nigeria

Selected wholesale cereal prices in Kano

Naira per kg



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Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Nigeria

Reference Date: 14-April-2020

FOOD SECURITY SNAPSHOT

- Planting ongoing in south under normal conditions
- Above-average cereal production estimated in 2019
- Cereal import requirements forecast at below-average level
- Higher food prices in northeast due to persisting conflict
- Increased external assistance needs in 2020

Start of 2020 cropping season in south follows timely onset of rains

Following the timely onset of seasonal rains in the south, planting of maize and yams started in early March 2020. The harvest of maize is expected to start in June, while harvesting operations for yams will start in July. Planting of rice, to be harvested from October, is underway. The cumulative rainfall amounts since early March were average to above average in most planted areas and supported the development of the maize crop, which is at sprouting and seedling stages. In the north, seasonal dry weather conditions are still prevailing and planting operations for millet and sorghum, to be harvested from September, are expected to begin in May-June with the onset of the rains. Persisting insecurity conditions and large scale population displacements continue to severely affect agricultural activities and hinder access to fields and agricultural inputs in the conflict-affected areas of the North-East, North-Central and North-West. In these areas, it is likely that most farming households will not be able to cultivate in 2020.

In April, despite the ongoing pastoral lean season, forage availability was overall satisfactory in the main grazing areas of the country. The domestic livestock seasonal return movement from the south to the north started in early March due to the normal onset of the rains in the south. The animal health situation is generally stable. FAO-Nigeria is supporting the Government to contain the prevalence of seasonal livestock disease outbreaks, including Trypanosomiasis in northern parts of the country (Plateau and Bauchi States).

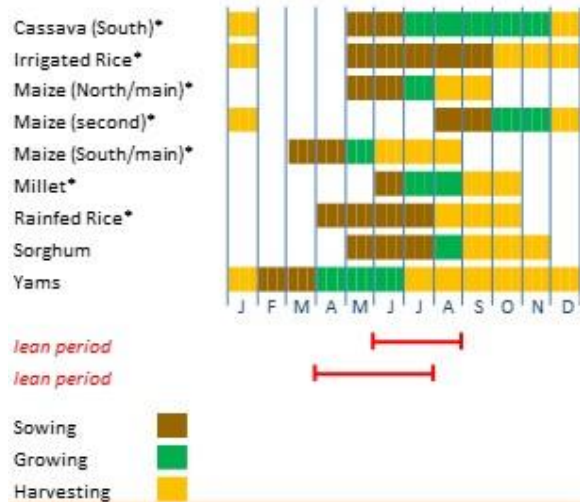
Above-average cereal production harvested in 2019

Harvesting activities for the 2019 rainfed and irrigated crops was completed by end-January. Favourable rainfall across the country and the adequate supply of inputs by the Government and

Nigeria

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Nigeria

Cereal Production

	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Maize	10 777	12 760	12 700	-0.5
Rice (paddy)	7 805	8 899	9 550	7.3
Sorghum	6 297	6 721	6 665	-0.8
Others	1 727	2 023	2 072	2.4
Total	26 606	30 404	30 986	1.9

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

several NGOs benefited the 2019 national cereal production, estimated at 30.9 million tonnes, about 16 percent above the five-year average. The 2019 harvest included 12.7 million tonnes of maize (18 percent above average) and 9.6 million tonnes of paddy (22 percent above average). However, despite the above-average aggregate production, several localities experienced production shortfalls due to pockets of drought during June-July, flooding in September as well as Fall Armyworm infestations on maize crops.

Below-average import requirements forecast

Despite trade restrictions introduced since 2015 by the Government, the country remains the largest importer of rice in Africa. Rice import quantities fluctuated substantially in recent years, reaching 1.8 million tonnes, while wheat imports reached 5.4 million tonnes in 2019. Following the above-average 2019 production, cereal import requirements for the 2019/20 (November/October) marketing year are forecast at a below-average level of 7.1 million tonnes.

Food prices at extremely high levels in northeast

Markets remain well supplied due to the commercialization of the recently harvested crops and substantial carryover stocks from the previous year. However, prices of locally produced cereals were generally higher in March 2020, supported by the increasing demand from the households in deficit areas as well as local processing factories as land borders remained officially closed. In particular, the extreme high levels of prices were reported in the northeast due to persisting insecurity and its impacts on trade activities and market availabilities. Prices of staple cereals are expected to decline in the coming months in most markets as a result of the decline in petrol prices from NGN 145 to NGN 125 per litre, which will probably lower transportation costs.

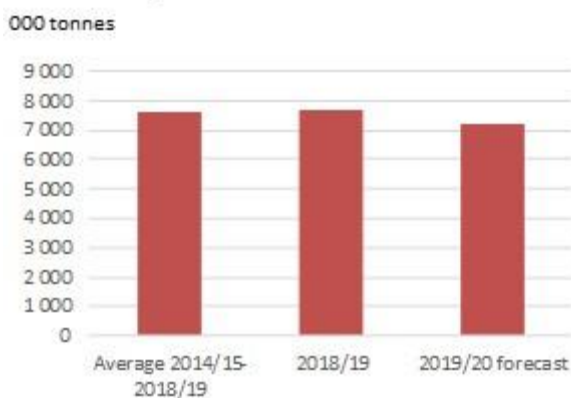
Over 5 million people remain food insecure

According to the March 2020 "Cadre Harmonisé" analysis, the aggregate number of severely food insecure people (CH Phase 3: "Crisis" and above) is estimated at about 5 million, up from the 2 million estimated in March 2019. If appropriate measures and responses are not implemented, this number is projected to increase to nearly 7 million people during the next lean season between June and August 2020, well above the about 5 million food insecure people that were estimated for the June-August 2019 period. Urgent food assistance is needed for 1.4 million people in Borno and 1 million people in Yobe states. The main drivers for the significant deterioration in the food security situation and the expected increase in the number of people in need of assistance are localized cereal production shortfalls and the escalation of armed and community conflicts.

In addition, the repeated attacks by armed groups in the northwest and central states have contributed to an increase in population displacements, with new arrivals mainly from the districts of Shiroro, Rafi, Munya and Wushishi. As of February 2020, the International Organization for Migration (IOM) identified over 2.5 million people that have been displaced, over 90 percent due to the insurgency in the northeastern states of Adamawa, Borno and Yobe, and the rest due to communal clashes in North-West/North-Central and to natural disaster. Most displaced households have limited income and rely on humanitarian assistance, but access is limited by the persisting insecurity.

Nigeria

Cereals Imports

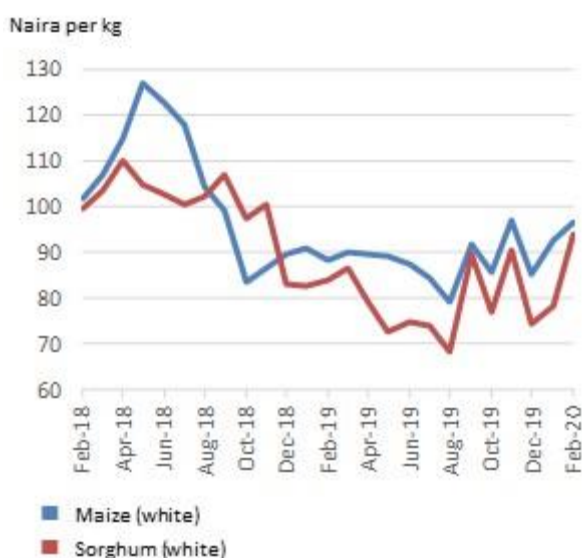


Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Nigeria

Selected wholesale cereal prices in Kano



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

COVID-19 and measures adopted by the Government

In view of the evolving COVID-19 pandemic, the Federal Government has decreed a total lockdown and a State-wide confinement up to 13 April 2020 in Lagos and Abuja, the states most affected by the virus outbreak. The Government has also taken some sanitary, social and economic measures and decided to close all land borders and all major markets across the country. Measures include the release of 70 000 tonnes of grains from the National Grain Reserve to be distributed to the vulnerable households. Official restrictions on population movements, combined with heightened levels of fear, have led many people to avoid leaving their homes. Although these measures have not affected their access to food, further restrictions on population movements could hamper their access to land and have a negative impact on 2020 agricultural production.

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GIEWS Country Brief Nigeria

Reference Date: 19-September-2019

FOOD SECURITY SNAPSHOT

- Favourable prospects for 2019 crops due to adequate cumulative rainfall amounts
- Slightly above-average import requirements forecast
- Higher food prices in northeast due to persisting conflict
- Assistance needs will remain high in 2019

Favourable prospects for 2019 crops due to adequate cumulative rainfall amounts

The rainy season was characterized by a timely onset in February/March in the south and in May/June in the north. Rains have been abundant across the season and cumulative precipitations were well above average in most areas, improving vegetation conditions and lifting crop prospects. The harvest of the main season maize crop was completed in August in the south, while the rice, millet and sorghum crops are at grain setting or maturity stages in the rest of the country. The aggregated crop production is expected at above-average levels, despite some production shortfalls in the northeast region. In the three northeastern states of Borno, Adamawa and Yobe, there are significant constraints to crop production, including restrictions on movement and effective use of dry blended fertilizers.

Pastures and water availability for livestock have improved by early September compared to the previous months, ending the pastoral lean season in the main grazing areas of the country. The animal health situation is overall stable. However, the conflict in the northeast and armed banditry, kidnapping and the farmer/herder conflict in northwest and north central parts of the country continue to limit the access to grazing land and veterinary services for pastoralists.

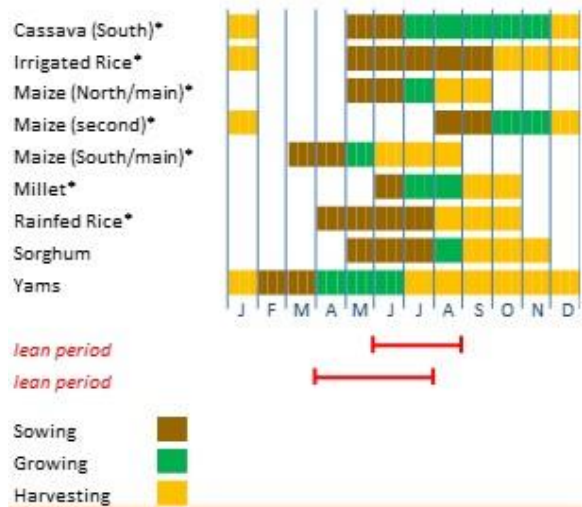
The aggregate cereal output in 2019 is forecast at 27.3 million tonnes, 3 percent lower than the 2018 record level, but still 4 percent higher than the previous five-year average. The overall favourable performance of the 2019 agricultural season mainly reflects adequate rainfall and continued support in terms of inputs by the Government and humanitarian actors across the country. This has also benefited from the improved security conditions and a re-engagement of agricultural investors lost to the 2015/16 economic recession.

Slightly above-average import requirements

Nigeria

Crop Calendar

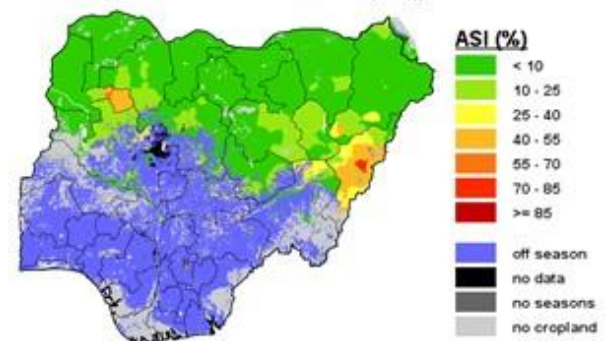
(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Nigeria - Agricultural Stress Index (ASI)

From start of season 1 to dekad 2, August 2019



Source: FAO/GIEWS Earth Observation System.

forecast

Domestic demand for imported rice remains strong despite trade restrictions introduced in 2015 by the Government of Nigeria. The country is the largest rice producer and importer in Africa, importing on average about 2.6 million tonnes per year. Wheat imports account for 5.4 million tonnes per year. Despite the above-average 2019 production, cereal import requirements for the 2018/19 (November/October) marketing year are forecast at above-average 8 million tonnes, as traders wish to replenish their stocks.

High levels of food prices in the northeast

Market supply has increased in September compared to previous months due to newly harvested maize, rice and tubers in the southern areas. Prices of coarse grains remained overall stable or declined slightly across most of the country in July as a result of well supplied markets. By contrast, in northeastern conflict-affected areas, disruptions to trade flows and marketing activities are resulting in high food prices.

Despite some improvements in security, over 2 million people remain food insecure

As of July 2019, the International Organization for Migration (IOM) identified over 1.9 million people that have been displaced, of which 92 percent by the insurgency in northeastern states of Adamawa, Borno and Yobe. In addition, flash floods beginning in the month of August 2019 and expected to continue towards the end of September, have affected close to 1 000 hectares of farmlands and resulted in livestock losses. As of 30 August 2019, an estimated 21 000 households have been displaced across the three states as a result of flooding. Heightened tensions in recent months have triggered further displacements, with new arrivals mainly in Askira-Uba, Bama, Gwoza, Ngala and Damboa in Borno State. Most of the displaced households are heavily dependent on humanitarian assistance.

According to the June 2019 "Cadre Harmonisé" analysis update, about 2.97 million people were estimated to be in need of food assistance from June to August 2019, with a significant decrease from the 3.70 million food insecure people in June-August 2018.

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Nigeria

Cereal Production

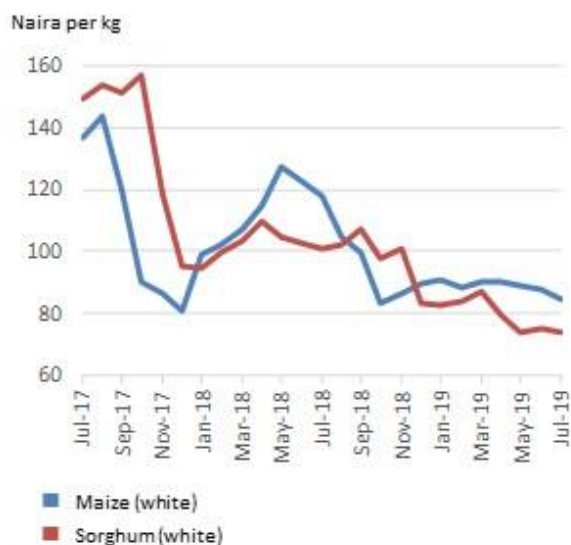
	2014-2018 average	2018	2019 forecast	change 2019/2018
	000 tonnes			percent
Maize	10 431	11 034	11 000	-0.3
Rice (paddy)	7 762	8 899	8 000	-10.1
Sorghum	6 158	6 026	6 300	4.6
Others	1 775	2 263	2 013	-11.1
Total	26 126	28 222	27 313	-3.2

Note: percentage change calculated from unrounded data.

Source: FAO/GIEWS Country Cereal Balance Sheet.

Nigeria

Selected wholesale cereal prices in Kano



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Nigeria

Reference Date: 27-May-2019

FOOD SECURITY SNAPSHOT

- Normal progress of 2019 cropping season due to favourable weather conditions
- Above-average cereal harvest gathered in 2018
- Slightly below-average import requirements forecast
- Higher food prices in northeast due to persisting conflict
- Moderate economic growth and increasing food price inflation
- Assistance needs will remain high in 2019

Normal progress of 2019 cropping season due to favourable weather conditions

Following the timely onset of seasonal rains, planting of maize and yams in the south started in February/March. The harvest of green maize in the south is expected to start in June, while harvesting operations for yams will start in July. Rice, to be harvested from October, was planted in March. Planting operations for millet and sorghum, to be harvested from September, are still ongoing. The cumulative rainfall amounts since February were average to above average in most areas and the most advanced growth stage is tillering, observed for maize crop. Weeding activities are normally progressing for crops already in place.

Pastures and availability of water for livestock have improved in May compared to previous months in the main grazing areas of the country. The animal health situation is overall stable. It is noteworthy, however, that there was an outbreak of Highly Pathogenic Avian Influenza (HPAI) in Plateau and Bauchi states between January and April 2019, which has been contained with the support of FAO-Nigeria. The conflict in the northeast and armed banditry in Zamfara and Katsina states continue to limit the access to normal grazing land for pastoralists.

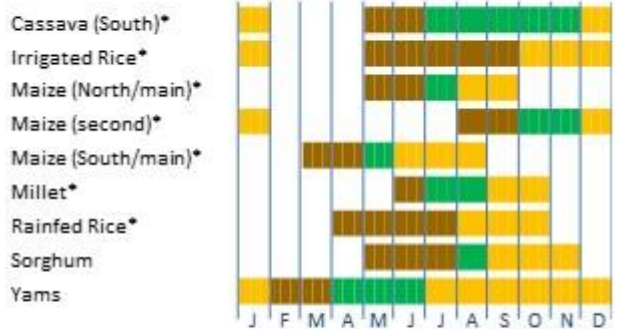
Above-average cereal harvest gathered in 2018

The 2018 agricultural season was characterized by favourable rainfall and support of inputs from the Government and NGOs across the country. Field reports also indicate an increase in farming activities in the northeast due to improved security conditions and some engagement of some investors back to farming in relation to the economic recession experienced between 2015 and 2016. Despite the incidence of pests (including Fall Armyworm), the country's aggregate cereal output in 2018 is estimated at about 28 million tonnes, about 12 percent above the five-year average. The 2018 harvest included 11 million tonnes of maize (7 percent above average), 8 million tonnes

Nigeria

Crop Calendar

(*major foodcrop)



lean period

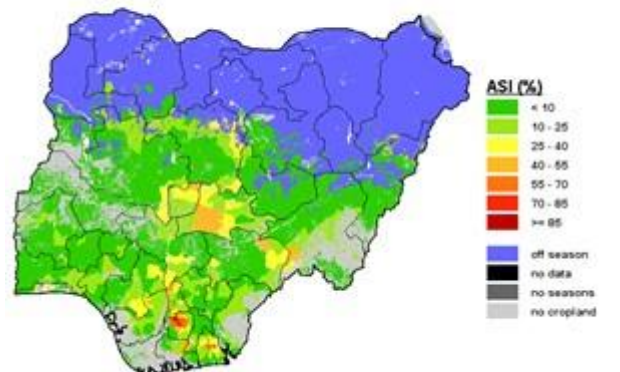
lean period

Sowing
Growing
Harvesting

Source: FAO/GIEWS, FEWSNET.

Nigeria - Agricultural Stress index (ASI)

Dekad 1, May 2019



Source: FAO/GIEWS Earth Observation System.

of rice (24 percent above average) and 6 million tonnes of sorghum (equivalent to the average).

Slightly below-average import requirements forecast

Domestic demand for imported rice remains strong despite trade restrictions introduced in 2015 by the Government. The country is the largest rice producer and importer in Africa, importing on average about 2.6 million tonnes per year. Wheat imports account for 5.4 million tonnes per year. Owing the above-average 2018 production, cereal import requirements for the 2018/19 (November/October) marketing year are set at 7.1 million tonnes, slightly below the average.

High levels of food prices in northeast

Market supplies and household food stocks are seasonally declining in most areas. Institutional purchases by the food industry and poultry farmers in major local markets as well as cross border purchases, mainly from Niger, are underway. Prices of coarse grains generally strengthened in April in line with seasonal trends. However, prices were well below the high levels of one and two years earlier reflecting the good level of market availabilities from the 2018 harvests. In the northeast of the country, food prices were relatively higher due to the negative impact of the Boko Haram conflict on market and livelihood activities.

Moderate economic growth projected, food price inflation increasing

According to the National Bureau of Statistics, the economy is forecast to grow by about 2 percent (year-on-year) in the first quarter of 2019, similar to the first quarter of 2018. Growth is supported by agriculture, transportation, storage, trade, construction of industrial investments and services, including communications. The year-on-year food inflation rate slightly increased to 13.70 percent in April 2019, higher than the 13.45 percent recorded in March of the same year as result of the increase in domestic food prices.

The Central Bank of Nigeria continues to provide direct intervention into the foreign exchange market in order to stabilize the Naira, the national currency. However, the Economist Intelligence Unit (EIU) forecasts the exchange rate to drop from NGN 306.5 per USD 1 in 2018 to NGN 319.5 per USD 1 in 2019 due to lower oil prices, looser monetary policy and high inflation.

Despite some improvements in security, over 2 million people remain food insecure

As of April 2019, the International Organization for Migration (IOM) identified over 1.9 million people that have been displaced, of which 92 percent by the insurgency in northeastern states of Adamawa, Borno and Yobe. Heightened tensions in recent months have triggered further displacements, with new arrivals mainly in northern and eastcentral Borno State, Geidam and Gujba (Yobe) as well as Madagali (Adamawa). Furthermore, the farmer/pastoralist conflict in the northcentral states continues to disrupt markets and main livelihood activities, causing population displacement in Kaduna, Nasarawa and Niger states. Most of the displaced households are heavily dependent on humanitarian assistance. Another dimension to the threat to food security is the armed banditry and cattle rustling ravaging northwestern states of Zamfara, Katsina, Kaduna and Sokoto. Rural farmers in these states are unable to cultivate their land essentially because of the threat of kidnapping and banditry attacks. Households have been displaced due to destruction of their houses and food stocks.

Nigeria

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Maize	10 301	11 083	11 034	-0.4
Rice (paddy)	7 146	7 835	8 899	13.6
Sorghum	6 098	6 298	6 026	-4.3
Others	1 615	1 654	2 263	36.8
Total	25 159	26 871	28 222	5.0

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Nigeria

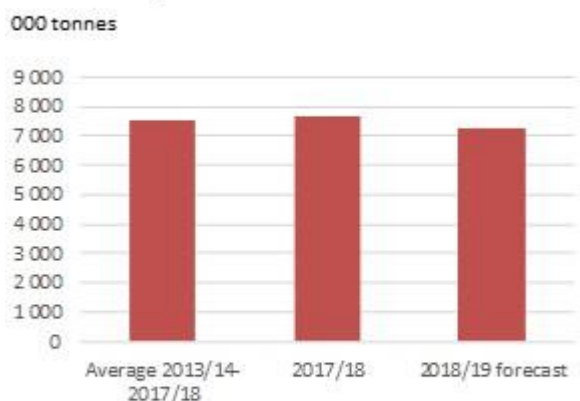
Selected wholesale cereal prices in Kano



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Nigeria

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

According to the March 2019 “Cadre Harmonisé” analysis, about 2.05 million people were estimated to be in need of food assistance from March to May 2019, with a significant decrease from the 3.71 million food insecure people in March-May 2018. The reduced caseload is largely due to the improved security conditions compared to last year. This number is expected to increase to 4.95 million people during the June to August 2019, if no mitigation actions are taken.

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GIEWS Country Brief Nigeria

Reference Date: 27-May-2019

FOOD SECURITY SNAPSHOT

- Normal progress of 2019 cropping season due to favourable weather conditions
- Above-average cereal harvest gathered in 2018
- Slightly below-average import requirements forecast
- Higher food prices in northeast due to persisting conflict
- Moderate economic growth and increasing food price inflation
- Assistance needs will remain high in 2019

Normal progress of 2019 cropping season due to favourable weather conditions

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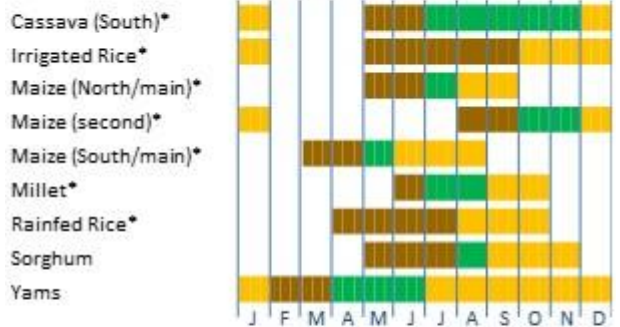
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Nigeria

Crop Calendar

(*major foodcrop)



lean period

lean period

Sowing

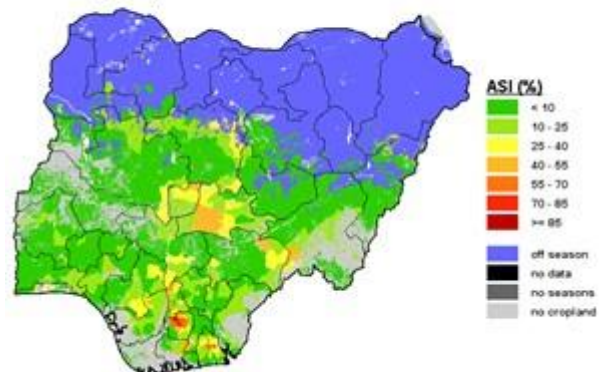
Growing

Harvesting

Source: FAO/GIEWS, FEWSNET.

Nigeria - Agricultural Stress index (ASI)

Dekad 1, May 2019



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Moderate economic growth projected, food price inflation increasing

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The Central Bank of Nigeria continues to provide direct intervention into the foreign exchange market in order to stabilize the Naira, the national currency. However, the Economist Intelligence Unit (EIU) forecasts the exchange rate to drop from NGN 306.5 per USD 1 in 2018 to NGN 319.5 per USD 1 in 2019 due to lower oil prices, looser monetary policy and high inflation.

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Nigeria

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Nigeria

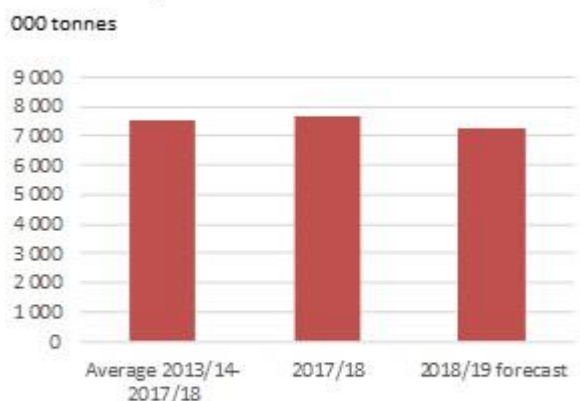
Selected wholesale cereal prices in Kano



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.

Nigeria

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

According to the March 2019 “Cadre Harmonisé” analysis, about 2.05 million people were estimated to be in need of food assistance from March to May 2019, with a significant decrease from the 3.71 million food insecure people in March-May 2018. The reduced caseload is largely due to the improved security conditions compared to last year. This number is expected to increase to 4.95 million people during the June to August 2019, if no mitigation actions are taken.

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GIEWS Country Brief Nigeria

Reference Date: 24-January-2019

FOOD SECURITY SNAPSHOT

- Above-average cereal production estimated in 2018
- Higher food prices in northeast due to persisting conflict
- Moderate economic growth and increasing food price inflation
- Assistance needs will remain high in 2019

Above-average cereal harvest gathered in 2018

Despite persisting conflict in the northeast zone and floods in some localized areas, generally adequate rainfall in 2018 benefitted crop development in most parts of the country. Harvesting activities for millet, sorghum, rainfed rice and main season maize crops have almost finalized, while harvesting of irrigated rice and second season maize crops is still ongoing and will be completed by end-January. The country's aggregate cereal output in 2018 is estimated at 28.7 million tonnes, about 5 percent higher than the output in 2017 and 18 percent above the five-year average.

In main grazing areas of the country, early and extended rainfall improved availability and quality of pastures as well as contributed to the replenishment of main water points including dams, ponds, streams, rivers and lakes. The animal health situation is generally stable, with no major disease outbreaks recorded. However, the conflict in the northeast and the clashes between farmers and pastoralists continue to limit access to grazing land for in the affected areas. These conflicts undermine the food security and stability in Nigeria.

Despite the above-average 2018 production, import requirements for the 2018/19 (November/October) marketing year are set at 7.8 million tonnes, slightly above average due to higher demand for human and industrial use.

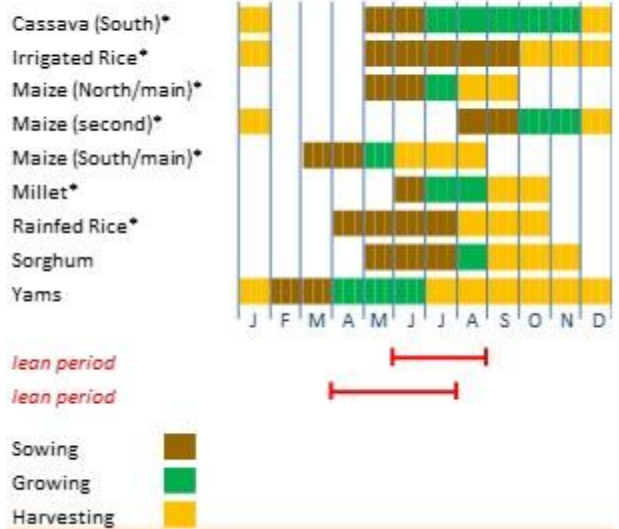
Prices of food remain high in the northeast

Market supplies have increased since October due to the new harvest of staples including maize, millet and tubers. Market demand for staple foods has gradually declined as households are increasingly relying on the consumption of their own production. Staple food prices for cereals, including maize, millet and sorghum, have remained relatively stable between October and November. However, prices remain at relatively high levels compared to the average due to the high inflation rate. In particular, staple food prices remain higher in the northeast compared to other neighbouring areas due to the persisting civil conflict.

Nigeria

Crop Calendar

(*major foodcrop)



Source: FAO/GIEWS, FEWSNET.

Nigeria

Cereal Production

	2013-2017 average	2017	2018 estimate	change 2018/2017
	000 tonnes			percent
Maize	10 485	12 005	12 760	6.3
Sorghum	6 124	6 431	6 721	4.5
Rice (paddy)	6 120	7 020	7 200	2.6
Others	1 670	1 928	2 023	5.0
Total	24 400	27 384	28 705	4.8

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheet.

Moderate economic growth projected, food price inflation increasing

According to the National Bureau of Statistics, the economy is forecast to grow by about 1.9 percent in 2019, down from the 2.1 percent recorded in 2018 due to the uncertainty related to the elections scheduled in February 2019 that may limit business, industrial investments and services. The year-on-year inflation rate in 2019 is forecast at about 13.9 percent, up from 12.2 percent in 2018 as a result of a weakening currency and high consumer prices.

According to the Nigerian Central Bank (CBN) and the parallel Bureau de Change, the Naira (NGN) has remained relatively stable in 2018 at an estimated average of NGN 305.5 per USD 1. However, the existing multiple exchange rate system is expected to persist in 2019, with a significant differential between the official (Government), the market-determined (investors and exporters) and black market rates. Reports from the field indicate that the CBN continues to supply USD 210 million into the foreign exchange market to avoid that the local currency deteriorates against other regional and international currencies.

Assistance needs remain high for food insecure households, especially in the northeast

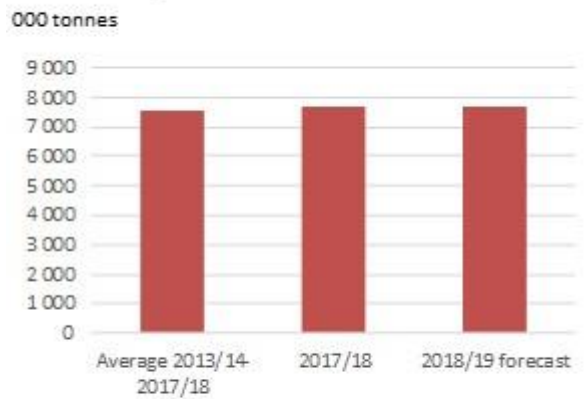
The civil conflict and cattle rustling activities in northwest states, the pastoralist/farmer conflict in the central states and localized communal conflict across the country continue to disrupt livelihoods and lead to increased population displacement. According to UNHCR, as of October 2018, over 2 million people were internally displaced, about 90 percent in the northeast. In addition, as of November 2018, over 32 600 Cameroonian refugees were in Cross River, Taraba, Benue and Akwa Ibom states. Most displaced households are heavily dependent on humanitarian assistance to satisfy their food needs.

According to the November 2018 "Cadre Harmonisé" analysis, about 2.5 million people were estimated to be in need of food assistance across the country between October and December 2018 compared to 3 million in October-December 2017. The caseload is projected to increase to 4.5 million during the June to August 2019 period, if mitigation measures are not taken. Almost 1.5 million people benefitted from food assistance in October 2018, across Borno, Yobe, and Adamawa states, significantly lower than the monthly average of 2.25 million in 2017 due to lower availability of food assistance.

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Nigeria

Cereals Imports



Note: Includes rice in milled terms. Split year refers to individual crop marketing years (for rice, calendar year of second year shown).

Source: FAO/GIEWS Country Cereal Balance Sheets.

Nigeria

Selected wholesale cereal prices in Kano



Source: FAO/GIEWS Food Price Monitoring and Analysis Tool.



GIEWS Country Brief Nigeria

Reference Date: 02-August-2018

FOOD SECURITY SNAPSHOT

- Planting of cereal crops ongoing under favourable weather conditions
- Cereal production in 2017 estimated at above-average level
- Prices of coarse grains remained at high levels due to weak local currency
- Despite continued assistance, acute food insecurity persists for over 3 million people, mostly in northeast

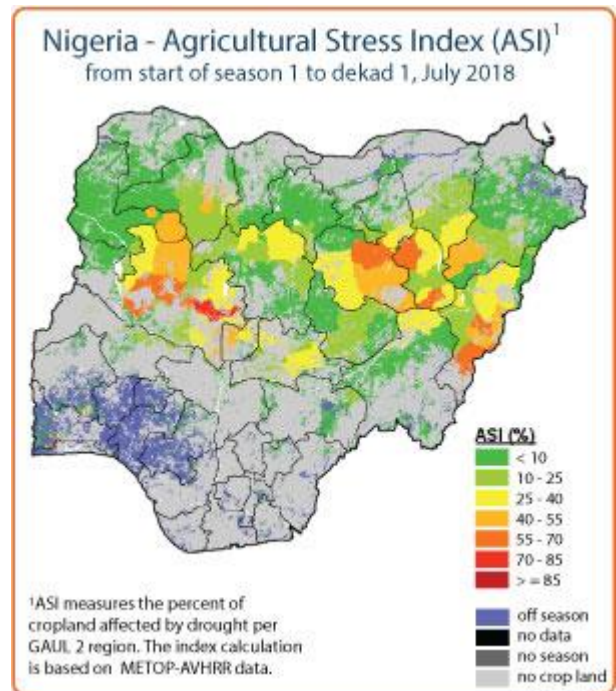
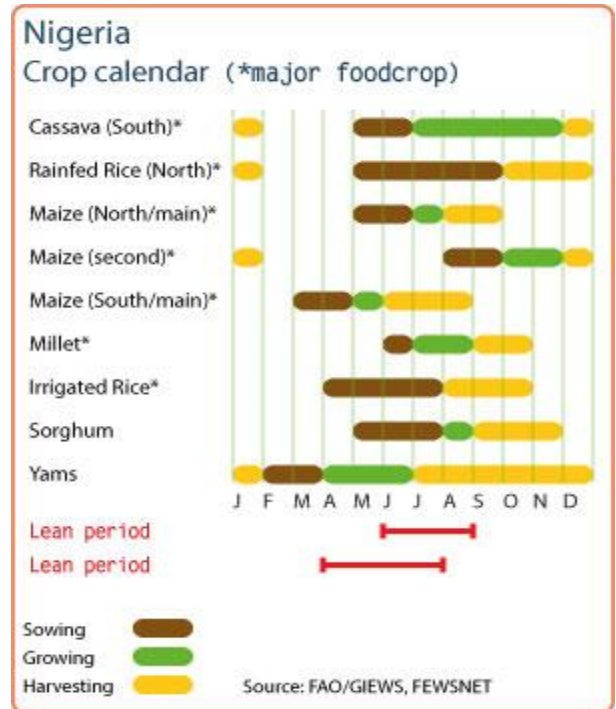
Favourable weather conditions allow normal progress of 2018 cropping season

Following the timely onset of seasonal rains, planting of maize and yams in the south started in February/March. Harvesting operations are expected to start in August for yams, while the newly-harvested green maize has reached some markets since June. Rice, to be harvested from October, was planted in March. Planting operations for millet and sorghum, to be harvested from September, were completed in July. Weeding activities are normally progressing in most cropped areas. Land preparation for the 2018 minor season maize crop is ongoing and planting activities are expected to be finalized in September 2018. The crop will be harvested between December 2018 and January 2019. The total rainfall amounts as at 10 July were average to above average in most areas and advanced tilling stages are already observed for cereals.

The cumulative rainfall amounts since February also generally improved pasture and water availability. However, the conflict in northeast Nigeria continues to limit the access to normal grazing land for the pastoralists in the affected areas.

Above-average cereal harvest gathered in 2017

The 2017 agricultural season was characterized by a timely onset of the rains and their good distribution and amounts in most states. Despite some localized floods, the early cessation of the rains in September 2017 and substantial outbreaks of pests (including Fall Armyworm), the country's aggregate cereal output in 2017 is estimated at about 26 million tonnes, about 2 percent higher than the last season's output and 12 percent above the five-year average. The 2017 harvest included 11.1 million tonnes of maize (15 percent above the average), 6.3 million tonnes of sorghum (equivalent to the average) and 7 million tonnes of rice (21 percent above the average).



Slightly above-average import requirements forecast

The country is still the largest rice importer in Africa, importing on average about 2.6 million tonnes per year. Despite the above-average 2017 production, import requirements for the 2017/18 (November/October) marketing year are set at 7.8 million tonnes, with an increase by about 7 percent compared to the previous year and about 6 percent above the average due to higher demand for human and industrial use. However, field reports indicate that the country's capacity to import cereals (mostly rice and wheat) will be limited due to insufficient foreign exchange availability.

Prices of food remain high in northeast

Wholesale prices of coarse grains increased seasonally between May and April. In Kaura market, prices of millet increased by 13 percent due to strong demand during Ramadan and prices of maize increased by 9 percent due to sustained demand from the poultry industry. Prices of rice and sorghum were relatively stable in May, with some declines of up to 8 percent for sorghum in Lagos. However, cereal prices in May 2018 remained generally lower than one year earlier, up to 25-30 percent lower in Lagos and Kano markets due to the good performance of the 2017 season. In the northeast, prices were more elevated than in the other markets of the country due to the persisting conflict. In some markets, including Marte, Abadam and Guzamala in Borno State, most trade activities remain interrupted.

Strong economic growth projected, food price inflation decreasing

According to the National Bureau of Statistics, the economy is forecast to grow by about 2 percent in 2018 due to the sustained growth in agriculture, industrial investments and services, including communications. The inflation rate, year-on-year, was estimated at about 12 percent in 2018, down from 16 percent in 2017 due to a slowdown in the prices of food, housing and utilities.

Although most macro-economic indicators continue to improve and foreign exchange reserves continue to grow as global crude oil prices increase, the depreciation of the Naira against the regional and international currencies continues to affect the trade flows with neighbouring countries. This situation is causing a reduction of imports from neighbouring countries, in particular for livestock and cash crops including cowpeas, sesame and nutmeg.

Despite some improvements in security conditions, about 3 million remain food insecure

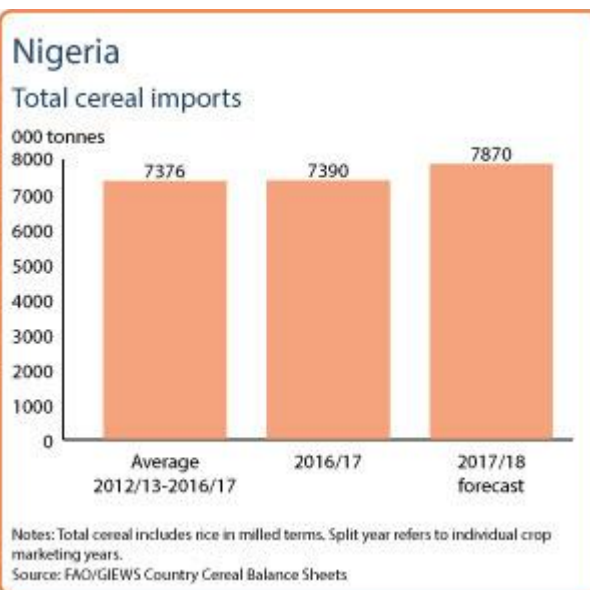
As of May 2018, the International Organization for Migration (IOM) identified over 1.8 million people that have been displaced by the ongoing conflict in the northeast, including Borno, Yobe, Adamawa, Bauchi, Gombe and Taraba states. The most displaced households are heavily dependent on humanitarian assistance, as market disruptions, restricted agricultural activities and above-average staple prices have severely limited their coping strategies.

According to the March 2018 "Cadre Harmonisé" analysis, about 2.3 million people were estimated to be in need of food assistance in Borno, Yobe and Adamawa states between March and May 2018 compared to the 3 million in October-December 2017. The reduced caseload is largely due to a sustained delivery of food assistance by humanitarian actors to a monthly average of 2.25 million people in Borno, Yobe and Adamawa states since March 2017 and increased

Nigeria
Cereal production

	2012-2016 average	2016	2017 estimate	change 2017/2016
	000 tonnes		percent	
Maize	9 631	10 414	11 083	6
Sorghum	6 393	6 939	6 298	-9
Rice (paddy)	5 803	6 500	7 020	8
Others	1 453	1 599	1 654	3
Total	23 279	25 452	26 056	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



livelihood activities in some liberated communities in the North East arising from FAO's agriculture livelihood support assistance to the returnees and IDPs. Nevertheless, the caseload is projected to return to 3 million during the June to August period if mitigation measures are not taken.

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GIEWS Country Brief Nigeria

Reference Date: 02-April-2018

FOOD SECURITY SNAPSHOT

- Above-average cereal harvest gathered in 2017
- Prices of coarse grains remained at high levels driven mostly by weak local currency
- Food security situation improved but over 3 million in need of assistance

Above-average cereal harvest gathered in 2017

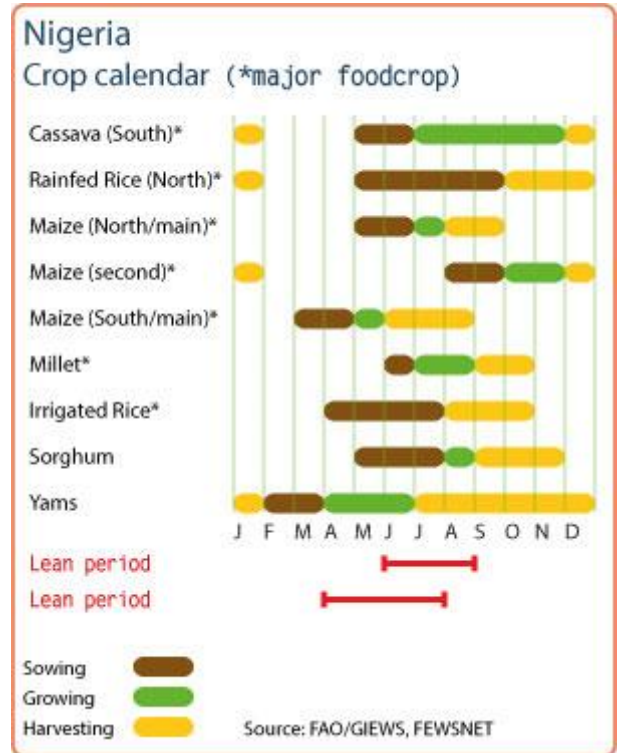
Harvesting of the 2017 cereal crops was completed in January 2018. The 2017 national production is estimated at above average levels owing to the timely onset and good distribution of the rains in most states. However, the rainy season ceased early in September 2017 in the northeast reducing local production prospects. In these areas, despite localized improvements in security, effects of the Boko Haram conflict and the threat of new attacks continue to affect agricultural activities and other livelihoods.

Despite some floods in September 2017, which affected 22 out of 36 states and substantial outbreaks of pests (including Fall Armyworm), the country's aggregate cereal output in 2017 is tentatively estimated at about 24.4 million tonnes, well above the last five-year average. The 2017 harvest included 11.1 million tonnes of maize (15 percent above average), 6.3 million tonnes of sorghum (equivalent to the average) and 5.4 million tonnes of rice (13 percent above average).

Near-average rainfall amounts also provided generally favourable conditions for pastoralists with sufficient pasture and water availability. However, limited access to pastures in conflict-affected areas resulted in early movements of pastoralists and consequent increased competition for pasture.

Slightly above average imports forecast

Despite the increases in local production, the country remains a net cereal importer and cereal imports (mostly rice and wheat for human consumption) are forecast to reach 7.8 million tonnes in 2017/18, about 6 percent above the five-year average. The country is still the largest rice importer in Africa, importing on average about 2.6 million tonnes per year. Reports indicate there might not be sufficient foreign exchange availability to meet demand for imported cereals.



Nigeria
Cereal production

	2012-2016 average	2016	2017 forecast	change 2017/2016
	000 tonnes			percent
Maize	9 631	10 414	11 083	6
Sorghum	6 393	6 939	6 298	-9
Rice (paddy)	4 737	4 950	5 350	8
Others	1 453	1 599	1 654	3
Total	22 213	23 902	24 386	2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

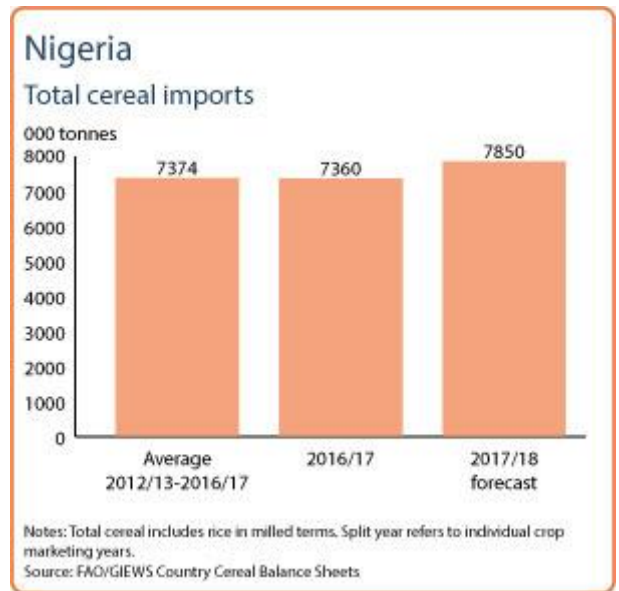
Prices of food remain high in the northeast

Wholesale prices of maize generally strengthened in January 2018, while those of millet and sorghum remained relatively stable or weakened in some markets. The price of white *gari* (made from cassava) and rice showed mixed trends. Prices were generally below their year-earlier values, but still relatively high, particularly in the northeastern parts of the country, where the ongoing conflict continues to hinder food production activities and disrupt the markets. The high level of food prices reflects the reduced value of the local currency against the US dollar throughout 2017, high transport costs and strong demand from traders and institutional bodies to replenish their stocks. The high prices of food are reflected in the annual food inflation, which remained high at 18.9 percent in January 2018.

Some improvements in food security but over 3 million still in need of food assistance

According to the latest “Cadre Harmonisé” (Harmonized Framework) analysis, the estimated number of people facing acute food insecurity and requiring urgent life-saving response and livelihood protection has declined from 8.9 million in June-August 2017 to about 3.2 million in October-December 2017 across the 16 states and Federal Capital Territory that were analysed. Moreover, approximately 1.7 million people have been internally displaced due to the insurgency in the northeastern region of the country as of February 2018, most of them entering being displaced for more than two years. Insecurity and damaged infrastructure, particularly in the Borno State, put additional strain on the delivery of humanitarian aid.

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GIEWS Country Brief Nigeria

Reference Date: 23-March-2017

FOOD SECURITY SNAPSHOT

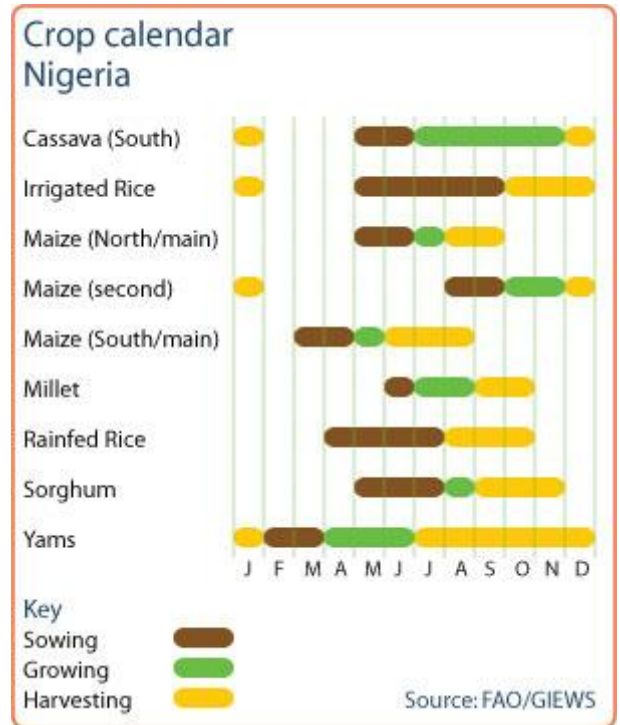
- Above-average cereal harvest gathered in 2016
- Coarse grain prices remained at high levels driven mostly by weak local currency
- Food security situation deteriorated significantly in Borno State, due to impact of civil conflict

Above-average cereal harvest gathered in 2016

Harvesting of the 2016 cereal crops was completed in January 2017. In spite of the late onset of the 2016 rainy season in the middle and northern parts of the country, above-average and well-distributed rainfall from mid-July benefited crop development in the major producing states of the country. Moreover, enhanced Government support to the agricultural sector and higher commodity prices supported area and yield increases in some regions. In the northeast, however, the Boko Haram conflict has had a huge impact on agriculture as a result of the large-scale population displacement and restrictions imposed on agriculture activities, leading to a sharp drop in planted areas in some states, notably in Borno State. Overall, the country's aggregate cereal output in 2016 was tentatively estimated at about 22.6 million tonnes, 5 percent higher than the 2015 above-average level.

Food and fuel prices remain high driven by weak currency and civil insecurity

Prices of domestically-produced coarse grains and tubers rose sharply in January after the good supplies from the recently-completed 2016 above-average harvest had put some downward pressure on prices late last year. The continuing steep depreciation of the local currency, civil insecurity and soaring transport costs were the main drivers behind the sharp regain in prices. The Nigerian Naira (NGN) has depreciated by more than 50 percent since early 2016, seriously affecting regional price trends and trade flows. Nigerian cereal exports to regional markets have increased, putting pressure on domestic food supplies. The weak currency has also suppressed Nigerian demand for imports from neighbouring countries, affecting household income and food security, particularly in the Sahel countries that usually export livestock and cash crops to Nigeria. Moreover, the currency weakness and the removal of subsidies have also increased fuel prices and consequently transport costs which are reportedly up to 200-300 percent above average, exacerbating the costlier and reduced imports.



**Nigeria
Cereal production**

	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	9 899	9 540	9 598	1
Sorghum	6 330	5 663	6 461	14
Rice (paddy)	4 660	4 750	4 950	4
Others	1 503	1 617	1 588	-2
Total	22 392	21 570	22 597	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

The Central Bank of Nigeria decided to allow the Nigerian Naira to float against the US dollar as of mid-June 2016. The change in policy was aimed at harmonizing the official and parallel exchange rates. The measure follows critical foreign currency shortages and a significant depreciation of the Nigerian Naira on the parallel market caused by the decline in international oil prices. According to the International Monetary Fund, international crude oil prices fell by 25 percent over 2015, leading to a 40 percent drop in Nigerian exports and doubling the Government deficit. Domestic fuel prices increased by about 67 percent. Prices of imported and local foods also rose significantly.

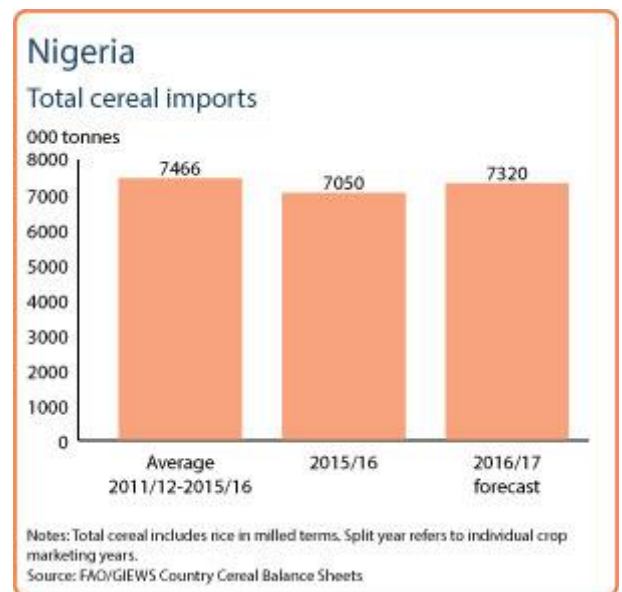
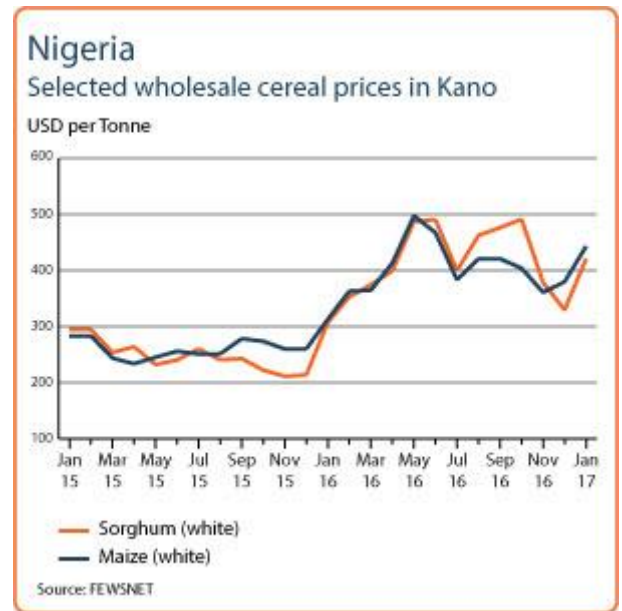
High import dependency persists

In August 2016, the Government of Nigeria launched its new Agriculture Promotion Policy (APP) for 2016-2020. The APP is expected to build on the achievements of the Agricultural Transformation Agenda (ATA) implemented by the previous Government to reduce the country's reliance on food imports. The ATA was implemented from 2012 to 2016 and focused on five key crops, including rice, sorghum and cassava. A number of import substitution measures were introduced to support domestic production, including the mandatory inclusion of 10 percent of cassava flour in bread. Input availability and access were also supported in the framework of the ATA, which aims to make Nigeria self-sufficient in rice. The Central Bank of Nigeria also banned importers from accessing foreign exchange markets in 41 categories of items, including rice. The ban was partially lifted in October 2015, when imports through the land borders were once again allowed after the payment of appropriate duties and charges. However, these measures amplified informal cross border imports from neighbouring coastal countries resulting in the Nigerian Customs Service to reintroduce the policy to restrict rice imports through land borders as of 25 March 2016.

Nigeria remains a food deficit country with cereal imports (mostly rice and wheat) forecast to exceed 7 million tonnes in 2017. The country is still the largest rice importer in Africa.

Food insecurity reaches extreme levels in pockets of Nigeria's Borno State

The continued conflict in the northern part of the country has resulted in widespread disruption in agricultural and marketing activities and has caused massive displacement. According to OCHA, about 1.8 million people have been internally-displaced in the North East Region as of March 2017, while over 200 000 are refugees in neighbouring Niger, Cameroon and Chad. The conflict has left a significant portion of the population without access to adequate food, water and health services. According to the last Cadre Harmonisé (CH) analysis conducted in March 2017 in 16 out of 36 states, 7.1 million people (about 7.5 percent of the population analysed) face acute food insecurity and require urgent life-saving response and livelihood protection. Around 5.6 million people (6 percent) are in CH Phase 3: Crisis, 1.4 million (1.5 percent) in CH Phase 4: Emergency and 44 000 people in CH Phase 5: Famine (i.e. IPC Catastrophe). The majority of the severely food insecure people are concentrated in Borno, Adamawa, and Yobe states of northeast Nigeria with a total of about 4.7 million people. The Borno State alone accounts for about 3.3 million severely food-insecure people. In addition, countrywide, a further 17.8 million people (19 percent) are classified in CH Phase 2: Stress, requiring resilience-building interventions.



Projections indicate that, in case of the lack of an adequate and timely humanitarian response, the situation is likely to deteriorate during the next lean period (June-August 2017), with 7.4 million people expected to be in Crisis, 1.5 million in Emergency and 50 000 in Famine conditions, bringing the total number of severely food-insecure people to 8.9 million. Although in recent months some territories in the most affected northeastern states have become accessible, trends show that food security and nutrition situation are worsening, especially in Borno State where the population in need of immediate humanitarian assistance (Phases 3 to 5) is expected to reach 3.6 million in August 2017, nearly 65 percent of the State population, including over 43 000 people expected to face Famine conditions (IPC Catastrophe).

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GIEWS Country Brief Nigeria

Reference Date: 15-February-2017

FOOD SECURITY SNAPSHOT

- Above-average cereal harvest was gathered in 2016
- Coarse grain prices remained at high levels driven mostly by weak local currency
- Food security situation deteriorated significantly in Borno State, due to impact of civil conflict

Above-average cereal harvest gathered in 2016

Harvesting of the 2016 cereal crops was completed in January 2017. In spite of the late onset of the 2016 rainy season in the middle and northern parts of the country, above-average and well-distributed rainfall from mid-July benefited crop development in the major producing states of the country. Moreover, enhanced Government support to the agricultural sector and higher commodity prices supported areas and yields increases in some regions. In the northeast, however, the Boko Haram conflict has had a huge impact on agriculture as a result of the large-scale population displacement and restrictions imposed on agriculture activities, leading to a sharp drop in planted areas in some states, notably in Borno. Overall, the country's aggregate cereal output in 2016 was tentatively estimated at about 22.6 million tonnes, 5 percent higher than the 2015 above-average level.

Food and fuel prices remain high driven by weak currency and civil insecurity

Good supplies from the new 2016 harvest contained the strong food prices upward trend of the previous months. However, the weak local currency and insecurity in some areas limited the decline and kept food prices well above their year-earlier levels, particularly those of sorghum. In northern Nigeria's largest city, Kano, coarse grains prices remained more than twice their year-earlier levels. The high food prices are driven mostly by the steep depreciation of the local currency. The Nigerian Naira (NGN) has depreciated by more than 50 percent since early 2016, seriously affecting regional price trends and trade flows. Nigerian cereal exports to regional markets have increased, putting pressure on domestic food supplies. The weak currency has also suppressed Nigerian demand for imports from neighbouring countries, affecting household income and food security particularly in the Sahel countries that usually export livestock and cash crops to Nigeria.

The Central Bank of Nigeria decided to allow the Naira to float against the US dollar as of mid-June 2016. The change in policy was aimed at harmonizing the official and parallel exchange

Nigeria

Cereal production

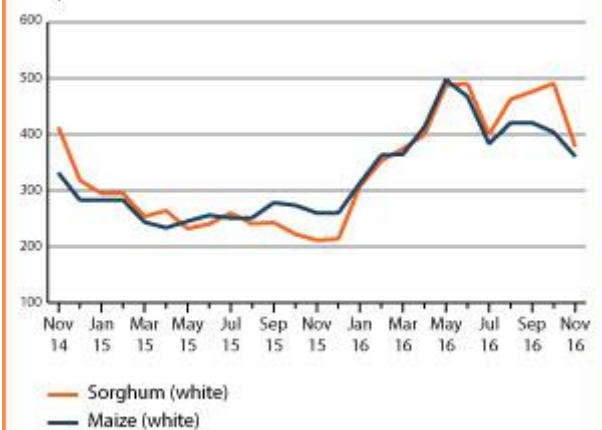
	2011-2015	2015	2016	change
	average		forecast	2016/2015
	000 tonnes			percent
Maize	9 899	9 540	9 598	1
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Others	1 503	1 617	1 588	-2
Total	22 392	21 570	22 597	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Nigeria

Selected wholesale cereal prices in Kano

USD per Tonne



Source: FEWSNET

rates. The measure follows critical foreign currency shortages and a significant depreciation of the Naira on the parallel market caused by the decline in international oil prices. According to the IMF, international crude oil prices fell by 25 percent over 2015, leading to a 40 percent drop in Nigerian exports and doubling the Government deficit. Domestic fuel prices increased by about 67 percent. Prices of imported and local foods also rose significantly.

High import dependency persists

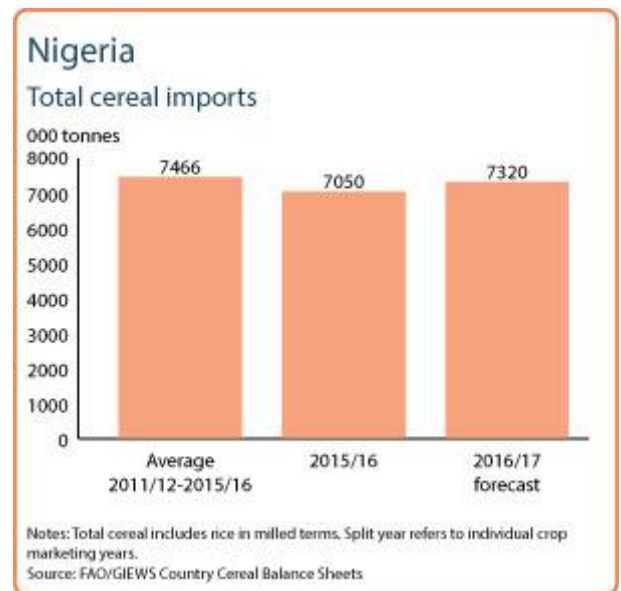
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Food insecurity reaches extreme level in pockets of Nigeria's Borno State

The continued conflict in the northern part of the country has resulted in widespread disruption in agricultural and marketing activities and has caused massive displacement. According to OCHA, about 1.8 million people have been internally-displaced in the North East Region as of January 2017, while over 200 000 are refugees in neighbouring Niger, Cameroon and Chad. The conflict has left a significant portion of the population without access to adequate food, water and health services. According to the last Cadre Harmonisé (CH) analysis conducted in October 2016 in 16 out of 36 States in Nigeria, 8.1 million people, - 9 percent of the population studied - were facing acute food insecurity and required urgent lifesaving response and livelihood protection. Around 6.2 million people (7 percent) were in CH Phase 3: Crisis, 1.8 million (2 percent) were in CH Phase 4: Emergency and 55 000 people were in CH Phase 5: Famine (i.e. IPC Catastrophe). A further 18.6 million people (22 percent) were in CH Phase 2: Stress, requiring resilience-building interventions.

Projections indicate that the situation is likely to deteriorate during the next lean period (June-August 2017): 8.7 million people are expected to be in Crisis, 2 million in Emergency and 121 000 in Famine conditions, bringing the total number of severely food-insecure people to 11 million in case of lack of adequate and timely response. The October 2016 Cadre Harmonisé



estimates that 4.7 million people are in need of urgent assistance (Phase 3 or higher) in Borno, Adamawa, and Yobe states of northeast Nigeria, 3.3 million of them in Borno State alone. Although some territories became accessible in these areas, trends show that food security and nutrition are worsening, especially in Borno. The population in need of immediate humanitarian assistance (those in Phases 3 to 5) increased from 2 million in August 2016 to 3.3 million in October-December 2016 and is expected to reach 3.6 million in August 2017, representing nearly 65 percent of the population of Borno. The state is projected to host 96 percent of the population (115 700 people) which is expected to face Famine conditions (IPC Catastrophe) during the next lean season, with the remaining located in Yobe (5 600 people).



GIEWS Country Brief Nigeria

Reference Date: 01-February-2017

FOOD SECURITY SNAPSHOT

- Above-average cereal harvest gathered in 2016
- Coarse grain prices remained at high levels driven mostly by weak local currency
- Food security situation deteriorated significantly in Borno State due to impact of civil conflict

Above-average cereal harvest gathered in 2016

Harvesting of the 2016 cereal crops was completed in January 2017. In spite of the late onset of the 2016 rainy season in the middle and northern parts of the country, above-average and well-distributed rainfall from mid-July benefited crop development in the major producing states of the country. Moreover, an enhanced Government support to the agricultural sector and higher commodity prices supported areas and yields increases in some regions. In the northeast, however, the Boko Haram conflict has had a huge impact on agriculture as a result of the large-scale population displacement and the restrictions imposed on agriculture activities, leading to a sharp drop in planted areas in some states, notably in Borno. Overall, the country's aggregate cereal output in 2016 was tentatively estimated at about 22.6 million tonnes, 5 percent higher than the 2015 above-average level.

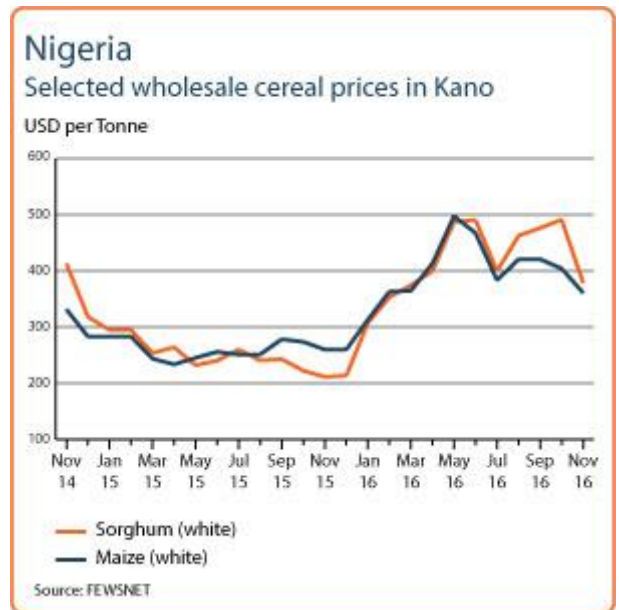
Food and fuel prices remain high driven by weak currency and civil insecurity

Good supplies from the new 2016 harvest contained the strong food prices upward trend of the previous months. However, the weak local currency and insecurity in some areas limited the decline and kept food prices well above their year-earlier levels, particularly those of sorghum. In northern Nigeria's largest city, Kano, coarse grains prices remained more than twice their year-earlier levels. The high food prices are driven mostly by the steep depreciation of the local currency. The Nigerian Naira (NGN) has depreciated by more than 50 percent since early 2016, seriously affecting regional price trends and trade flows. Nigerian cereal exports to regional markets have increased, putting pressure on domestic food supplies. The weak currency has also suppressed Nigerian demand for imports from neighbouring countries, affecting household income and food security particularly in the Sahel countries that usually export livestock and cash crops to Nigeria.

The Central Bank of Nigeria decided to allow the Naira to float against the US dollar as of mid-June 2016. The change in policy

Nigeria				
Cereal production				
	2011-2015 average	2015	2016 forecast	change 2016/2015
	000 tonnes			percent
Maize	9 899	9 540	9 598	1
Sorghum	6 330	5 663	6 461	14
Rice (paddy)	4 660	4 750	4 950	4
Others	1 503	1 617	1 588	-2
Total	22 392	21 570	22 597	5

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets



was aimed at harmonizing the official and parallel exchange rates. The measure follows the critical foreign currency shortages and a significant depreciation of the Naira on the parallel market caused by the decline in international oil prices. According to the International Monetary Fund, international crude oil prices fell by 25 percent over 2015, leading to a 40 percent drop in Nigerian exports and doubling the Government deficit. Domestic fuel prices increased by about 67 percent. Prices of imported and local foods also rose significantly.

High import dependency persists

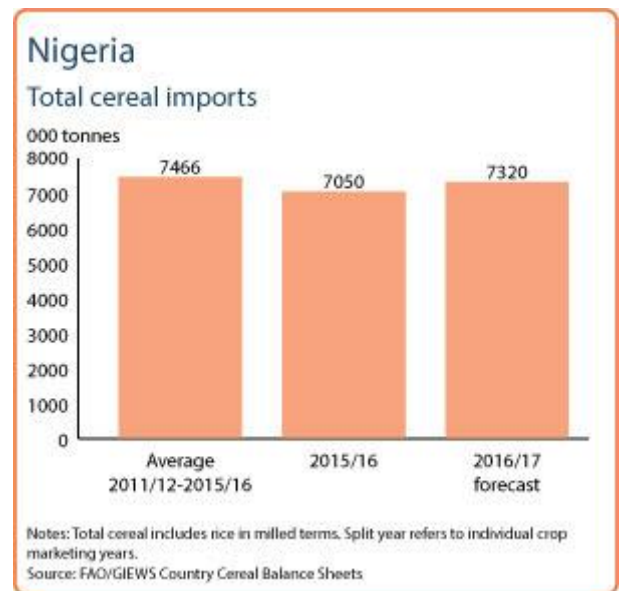
In August 2016, the Government launched its new Agriculture Promotion Policy (APP) for 2016-2020. The APP is expected to build on the achievements of the Agricultural Transformation Agenda (ATA) implemented by the previous Government to reduce the country's reliance on food imports. The ATA was implemented from 2012-2016 and focused on five key crops, including rice, sorghum and cassava. A number of import substitution measures were introduced to support domestic production, including the mandatory inclusion of 10 percent of cassava flour in bread. Input availability and access were also supported in the framework of the ATA, which aims to make Nigeria self-sufficient in rice. The Central Bank of Nigeria also banned importers from accessing foreign exchange markets in 41 categories of items, including rice. The ban was partially lifted in October 2015, when imports through the land borders were once again allowed after the payment of appropriate duties and charges. However, these measures amplified informal cross border imports from neighbouring coastal countries resulting in the Nigerian Customs Service to reintroduce the policy to restrict rice imports through land borders as of 25 March 2016.

Nigeria remains a food deficit country with cereal imports (mostly rice and wheat) forecast to exceed 7 million tonnes in 2017. The country is still the largest rice importer in Africa.

Food insecurity reaches extreme level in pockets of Nigeria's Borno State

The continued conflict in the northern part of the country has resulted in widespread disruption in agricultural and marketing activities and has caused massive displacement. According to OCHA, about 1.8 million people have been internally-displaced in the Northeast Region as of January 2017, while over 200 000 are refugees in neighbouring Niger, Cameroon and Chad. The conflict has left a significant portion of the population without access to adequate food, water and health services. According to the last Cadre Harmonisé (CH) analysis conducted in October 2016 in Nigeria, 8.1 million people – 9 percent of the population studied – were facing acute food insecurity and required urgent lifesaving response and livelihood protection. Around 6.2 million people (7 percent) were in CH Phase 3: Crisis, 1.8 million (2 percent) were in CH Phase 4: Emergency and 55 000 people were in CH Phase 5: Famine (i.e. IPC Catastrophe). A further 18.6 million people (22 percent) were in CH Phase 2: Stress, requiring resilience-building interventions.

Projections indicate that the situation is likely to deteriorate during the next lean period (June-August 2017): 8.7 million people are expected to be in Crisis, 2 million in Emergency and 121 000 in Famine conditions, bringing the total number of severely food-insecure people to 11 million. The October 2016 Cadre Harmonisé estimates that 4.7 million people are in need of urgent assistance (Phase 3 or higher) in Borno, Adamawa and Yobe states of northeast Nigeria, 3.3 million of them in Borno State



alone. Although the territories in these areas are being liberated, trends show that food security and nutrition are worsening, especially in Borno. The population in need of immediate humanitarian assistance (those in Phases 3 to 5) increased from 2 million in August 2016 to 3.3 million in October-December 2016 and are expected to reach 3.6 million in August 2017, representing nearly 65 percent of the population of Borno. The State is projected to be home to 96 percent of the population (115 700 people) expected to face Famine conditions (IPC Catastrophe), during the next lean season – with the remaining located in Yobe (5 600 people).



GIEWS Country Brief Nigeria

Reference Date: 20-July-2016

FOOD SECURITY SNAPSHOT

- Crop prospects uncertain due to persisting rainfall deficits in many parts of the country
- Coarse grain prices continued upward trend of previous months, driven mostly by depreciation of local currency
- Food security situation deteriorated significantly in Borno State, due to impact of civil conflict

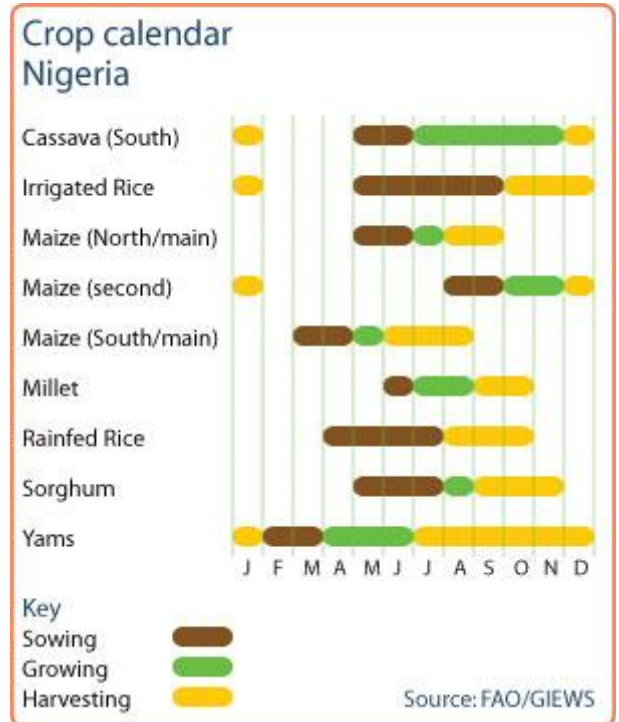
Crop prospects uncertain due to rainfall deficits in parts of the country

In the southern part of the country, planting of the 2016 main maize crop was completed in June. According to remote sensing analysis, the onset of the cropping season was delayed and characterized by irregular precipitation, resulting in rainfall deficits in several areas. Harvest prospects remain uncertain in spite of increased precipitation in recent weeks.

In the North, which has only one rainy season, planting of coarse grains is underway. The Boko Haram conflict has had a significant impact on the agricultural sector in the northeast due to livestock losses and reduced agricultural production, destruction of irrigation and farming facilities, and collapse of extension services, including veterinary health facilities. There is a need to provide livelihoods support for IDP populations, recent returnees and local populations in areas that have seen conflict over the past several years. In order to respond to the immediate needs of the affected people, the Government and partner organizations, including FAO, are providing targeted farmers with seeds and a wide range of agriculture based activities aimed to quickly generate food production.

Above-average harvest was gathered in 2015

In spite of the late onset of the 2015 rainy season in the middle and northern parts of the country, above-average and well-distributed rainfall from mid-July benefited crop development in the major producing states of the country. Although civil insecurity and population displacement continued to disrupt farming activities in Borno, Yobe and Adamawa states, official estimates indicated an above average 2015 cereal production. The country's cereal output in 2015 was estimated at about 24 million tonnes, close to the previous year's level and 6 percent above average.



Nigeria
Cereal production

	2010-2014 average	2014	2015 estimate	change 2015/2014
	000 tonnes			percent
Maize	9 711	10 990	10 800	-2
Sorghum	6 776	6 941	6 950	0
Rice (paddy)	4 618	4 900	4 750	-3
Others	1 471	1 592	1 540	-3
Total	22 576	24 423	24 040	-2

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Food and fuel prices soar due to depreciation of the Naira

The Central Bank of Nigeria decided to allow the Naira to float against the US dollar as of mid-June 2016. The change in policy is aimed at harmonizing the official and parallel exchange rates. The measure follows critical foreign currency shortages and a significant depreciation of the Naira on the parallel market caused by the decline in international oil prices. According to the IMF, international crude oil prices fell by 25 percent over 2015, leading to a 40 percent drop in Nigerian exports and doubling the Government deficit. Domestic fuel prices increased by about 67 percent. Prices of imported and local foods also rose significantly.

Coarse grain prices increased steeply from January to May in several markets, including the northern Kano market where millet prices were nearly 80 percent higher than a year earlier, while those of sorghum were more than double their values in May last year and at record highs. Prices of rice were also reportedly high. Increasing prices of both domestic and imported foods were mainly the result of the depreciation of the Naira. Increased fuel and transport costs provided additional support.

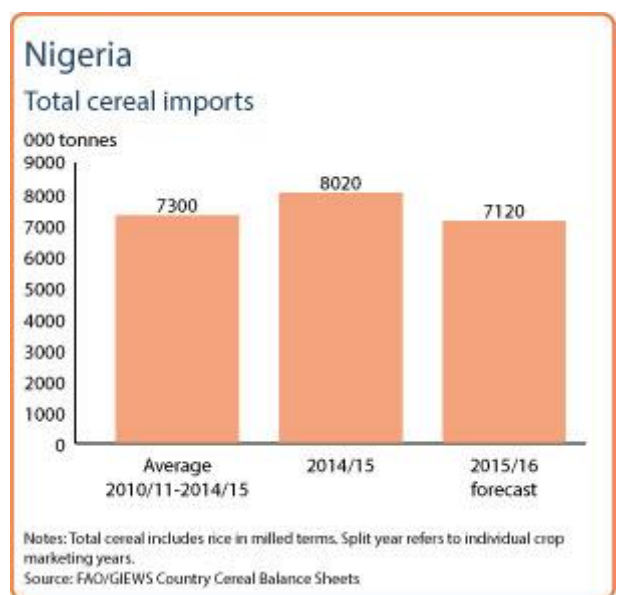
High import dependency persists

In 2012, the Government launched the Agriculture Transformation Agenda (ATA) to reduce the country's reliance on food imports by increasing production of the five key crops, including rice, sorghum and cassava. A number of import substitution measures were introduced to support domestic production, including the mandatory inclusion of 10 percent of cassava flour in bread. Input availability and access were also supported in the framework of the ATA, which aims to make Nigeria self-sufficient in rice. The Central Bank of Nigeria also banned importers from accessing foreign exchange markets in 41 categories of items, including rice. The ban was partially lifted in October 2015, when imports through the land borders were once again allowed after the payment of appropriate duties and charges. However, these measures amplified informal cross border imports from neighbouring coastal countries resulting in the Nigerian Customs Service to reintroduce the policy to restrict rice imports through land borders as of 25 March 2016.

Nigeria remains a food deficit country with cereal imports (mostly rice and wheat) forecast to exceed 7 million tonnes in 2016. The country is still the largest rice importer in Africa.

Food insecurity reaches extreme level in pockets of Nigeria's Borno State¹

The continued conflict in the northern part of the country has resulted in widespread disruption in agricultural and marketing activities and has caused massive displacement. According to OCHA, about 2.4 million people have been internally-displaced. In Borno, about 124 000 new Internally-Displaced Persons (IDPs) were discovered earlier this year in the following difficult to reach Local Government Areas (LGAs): Dikwa (52 000), Mongonu (35 000), Bama (25 000) and Damboa (9 500). In addition, as of May 2016, about 138 000 people are estimated to have left Nigeria for Niger, nearly 65 000 people have taken refuge in Cameroon and about 7 300 in Chad. The conflict has disrupted commodity movements leading to higher price levels and volatility in the northeast.



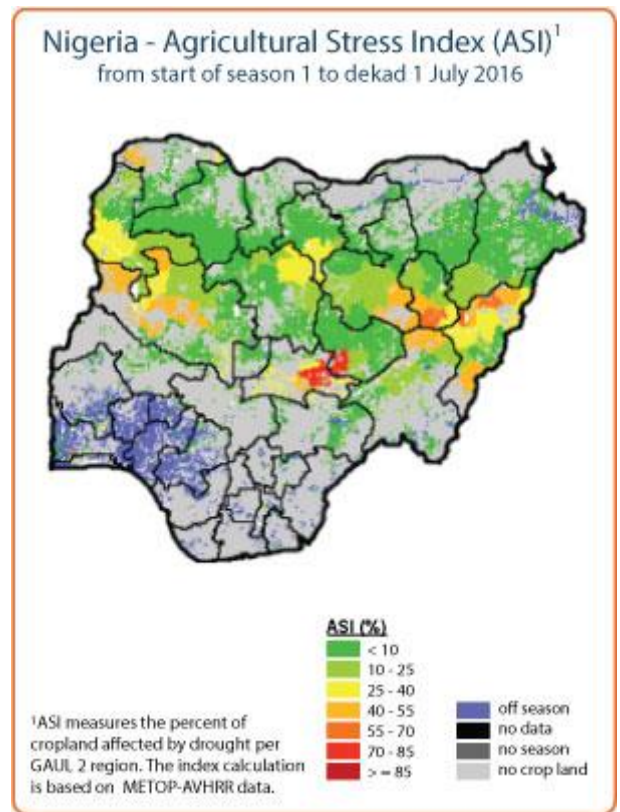
The conflict has left a significant portion of the population without access to adequate food, water and health services. The Nigerian Minister of Health has declared a “nutrition emergency” in Borno State. Acute food insecurity is widespread in northeast Nigeria, with the March 2016 Cadre Harmonisé estimating that more than 3 million people are in CH/IPC Phase 3 “Crisis” or worse and in need of urgent humanitarian assistance. Available information, though limited, suggests two areas of particular concern: Local Government Areas (LGAs) adjacent to the Sambisa Forest and LGAs in northern Borno. Areas of concern near the Sambisa Forest include: Bama, Damboa and Gwoza, and parts of Kaga and Konduga in eastern Borno State and Madagali LGA in northern Adamawa State. Between 15 and 21 June, five rapid assessment missions (Government of Nigeria, WFP, IOM, joint UN and MSF) visited the town of Bama, where approximately 25 000 displaced people have concentrated after being liberated from Boko Haram-controlled areas. The visits confirmed visible malnutrition among adults and children, an extreme scarcity of food and water, very limited health facilities and a lack of functioning markets.

In northern Borno State, Abadam, Gubio, Guzamala, Kukawa, Mobbar, Nganzai and parts of Dikwa, Marte, Mafa, Ngala and Kala/Balge, LGAs remain largely inaccessible to humanitarian agencies. The severity of the food insecurity is unknown, but could be at critical levels given the impact of movement restrictions and ongoing conflict.

Additional areas of concern include greater Maiduguri and southern Yobe State. In April 2016, a joint UN assessment estimated that over 500 000 people required immediate food assistance in and around Maiduguri. In Yobe, the Boko Haram conflict has limited access to parts of Gujba, Gulani and Geidam LGAs. Though these areas are somewhat more accessible than those in Borno, households in more remote areas are likely to be in urgent need of assistance.

Improved and sustained humanitarian access to IDP populations, as well as populations located in active conflict zones, is urgently needed. This improved access should be accompanied by a substantial increase in the provision of life-saving food, health, nutrition and WASH (Water, Sanitation and Hygiene) assistance already provided by national and state emergency management agencies, NGO partners and other stakeholders. Beyond the immediate needs, livelihoods support is needed for the affected populations both within areas of limited accessibility, as well as other zones in the northeast that have seen conflict over the past several years.

¹ This section draws heavily on a recent joint alert by FAO, FEWSNet, CILSS and WFP.



Reference Date: 25-April-2016

FOOD SECURITY SNAPSHOT

- Cropping season in 2016 started in South, while seasonably dry conditions still prevail in northern states
- Favourable rains in major producing regions led to increased crop production at national level in 2015
- Coarse grain prices increased steeply in January and February 2016
- Food security situation remains critical in northern parts, especially in Borno and Yobe, due to civil conflict

Cropping season in 2016 started in South

The onset of the 2016 rainy season in the south (March-October) was marked by above average rains. Land preparation and maize planting are underway in southern states, while dry conditions are still present in the north, with the rainy season expected to begin in May.

Last year, adequate rains in major producing areas contributed to increased cereal production

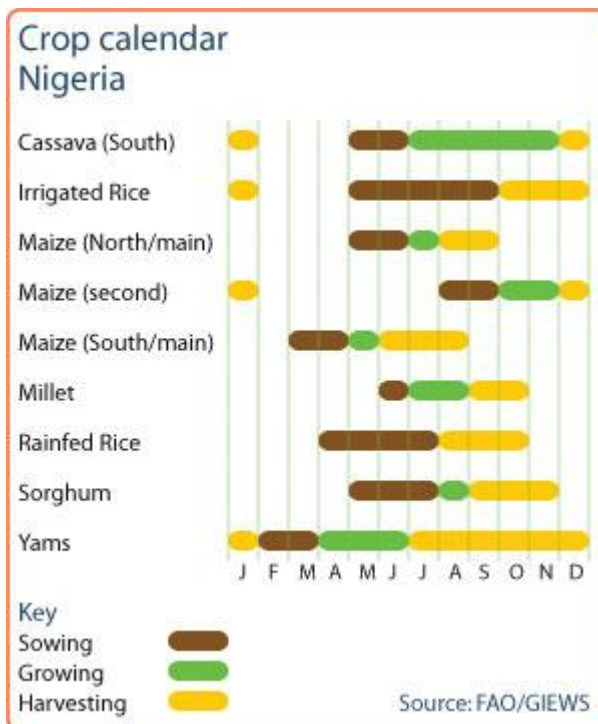
Harvesting of the 2015 cereal crops was completed in January 2016. In spite of the late onset of the 2015 rainy season in the middle and northern parts of the country, above-average and well-distributed rainfall from mid-July benefited crop development in the major producing states of the country. Although civil insecurity and population displacement continued to disrupt farming activities in Borno, Yobe and Adamawa states, official estimates indicated an above-average 2015 cereal production. FAO estimates the country's cereal output in 2015 at about 24 million tonnes, close to the previous year's level and 6 percent above average.

Coarse grain prices increased steeply after declining for several months

Coarse grain prices increased steeply in January and February in several markets, including the northern Kano market, after declining for several months. A recent sharp depreciation of the Naira on the parallel market, driven by reduced supplies of foreign exchange reserves, coupled with persisting civil conflict in northern Nigeria, contributed to the sharp food price increases.

High import dependency persists

In 2012, the Government launched the Agriculture Transformation Agenda (ATA) to reduce the country's reliance on food imports by increasing production of the five key crops, including rice, sorghum and cassava. A number of import substitution measures were introduced to support domestic production, including the mandatory inclusion of 10 percent of cassava flour in bread. Input availability and access were also supported in the framework of the ATA, which aims to make Nigeria self-sufficient in rice. The Central Bank of Nigeria recently banned importers from accessing foreign exchange markets in 41 categories of items, including rice. The ban was partially lifted in October 2015, when imports through the land borders were once again allowed after the payment of appropriate duties and charges. However, these measures amplified informal cross-border imports from neighbouring coastal



Nigeria Cereal production

	2010-2014 average	2014	2015 forecast	change 2015/2014
	000 tonnes		percent	
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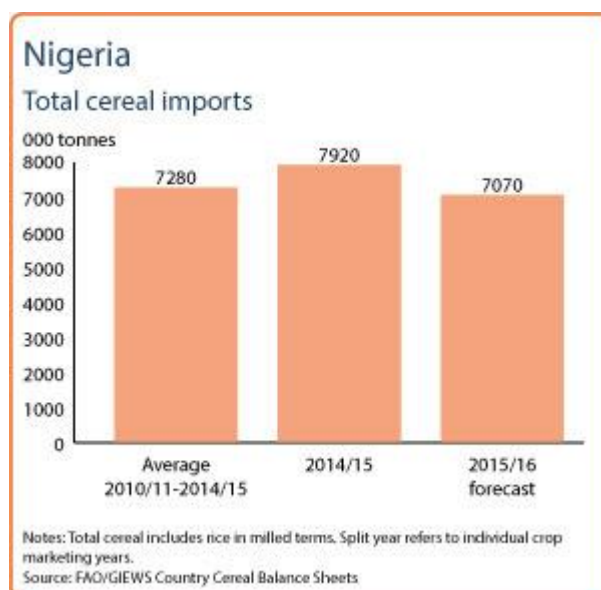
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Source: FAO/GIEWS Country Cereal Balance Sheets

countries resulting in the Nigerian Customs Service re-introducing the policy to restrict rice imports through land borders as of 25 March 2016.

Nigeria remains a food deficit country with cereal imports (mostly rice and wheat) forecast to exceed 7 million tonnes in 2016. The country is still the largest rice importer in Africa.

Continued assistance still needed for vulnerable people in Northeastern regions largely due to ongoing conflict and internal displacements

The continued conflict in the northern part of the country has resulted in widespread disruption in agricultural and marketing activities and has caused massive displacement. According to OCHA, about 2.2 million people have been internally displaced. In Borno, about 124 000 new Internally-Displaced Persons (IDPs) have been discovered recently in the four difficult-to-reach local Government areas of Borno: Dikwa (52 000), Mongonu (35 000), Bama (27 000) and Damboa (9 500). In addition, over 100 000 people are estimated to have left Nigeria for Niger, nearly 70 000 people have taken refuge in Cameroon and about 14 000 in Chad. The conflict has disrupted commodity movements leading to higher price levels and volatility in parts of the northeast. About 3.4 million people, located mostly in Borno and Yobe, are estimated to be in Phase 3: "Crisis" and above, according to the last Cadre Harmonisé analysis conducted in the country.



Reference Date: 09-March-2016

FOOD SECURITY SNAPSHOT

- Preliminary estimates for 2015 harvest point to above-average cereal production
- Coarse grain prices increased steeply in January 2016
- Civil conflict continues to affect food security in northern parts, especially in Borno and Yobe

Adequate rains in 2015 resulted in above-average cereal production

Harvesting of the 2015 cereal crops was completed in January 2016. In spite of the late onset of the 2015 rainy season in the middle and northern parts of the country, above-average and well-distributed rainfall from mid-July benefited crop development in the major producing states of the country. Although civil insecurity and population displacement continue to disrupt farming activities in Borno, Yobe and Adamawa states, preliminary estimates point to an above-average 2015 cereal production. FAO tentatively forecasts the country's cereal output in 2015 at about 24 million tonnes, close to the previous year's level and 6 percent above average.

Coarse grain prices increased steeply after declining for several months

Coarse grain prices increased steeply in January in several markets, including the northern Kano market, after declining for several months. A recent sharp depreciation of the Naira on the parallel market, driven by reduced supplies of foreign exchange reserves, coupled with persisting civil conflict in northern Nigeria, contributed to the sharp food price increases.

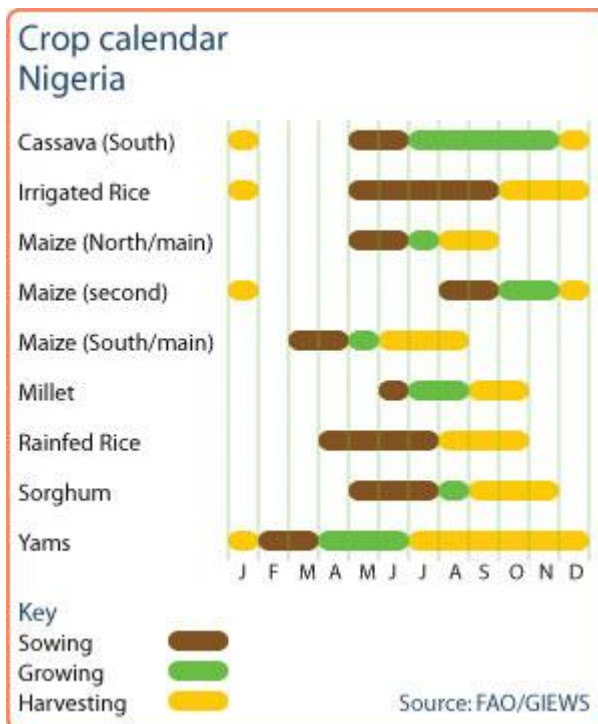
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In spite of these measures, Nigeria remains a food deficit country with cereal imports (mostly rice and wheat) forecast to exceed 7 million tonnes in 2016. The country is still the largest rice importer in Africa.

Continued assistance still needed for vulnerable people

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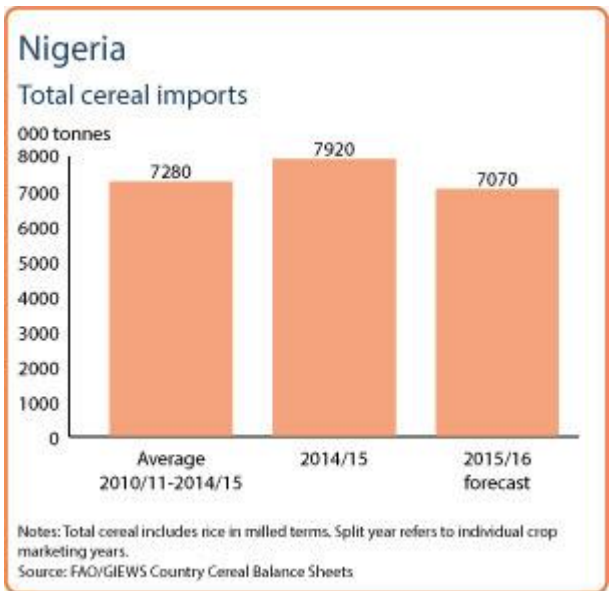


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70 000 people have taken refuge in Cameroon and about 14 000 in Chad. The conflict has disrupted commodity movements leading to higher price levels and volatility in parts of the northeast. About 4.4 million people, located mostly in Borno and Yobe, are estimated to be in Phase 3: “Crisis” and above, according to the last Cadre Harmonisé analysis conducted in the country.



Reference Date: 22-December-2015

FOOD SECURITY SNAPSHOT

- Preliminary estimates for 2015 harvest point to above-average cereal production
- Coarse grain prices are on the decline, reflecting adequate supplies
- Civil conflict continues to affect food security in northern parts, especially in Borno and Yobe

Adequate rains in 2015 resulted in above-average cereal production

Harvesting of the 2015 cereal crops will be completed in January 2016. In spite of the late onset of the 2015 rainy season in the middle and northern parts of the country, above-average and well-distributed rainfall from mid-July benefited crop development in the major producing states of the country. Although civil insecurity and population displacement continue to disrupt farming activities in Borno, Yobe and Adamawa states, preliminary estimates point to an above-average 2015 cereal production. FAO tentatively forecasts the country's cereal output in 2015 at about 24 million tonnes, close to the previous year's level and 6 percent above average.

Ample supplies keep cereal prices low

Reflecting ample supplies, markets are well supplied and coarse grains prices have remained at low levels throughout 2015. In the main northern Kano market, millet and sorghum dropped by 19 percent and 15 percent, respectively, between September and November.

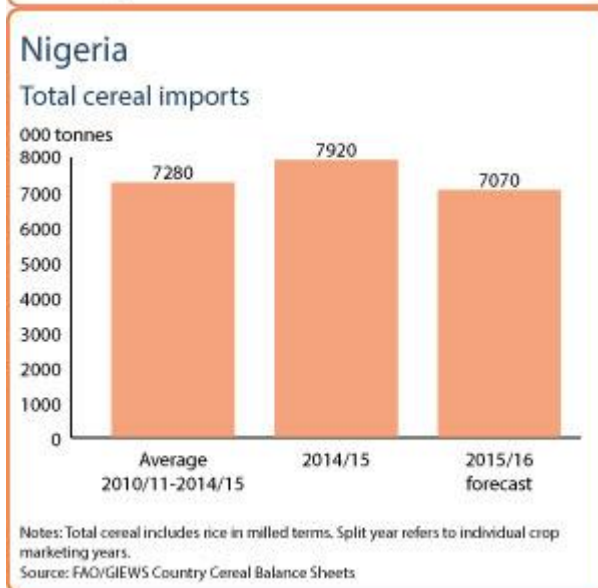
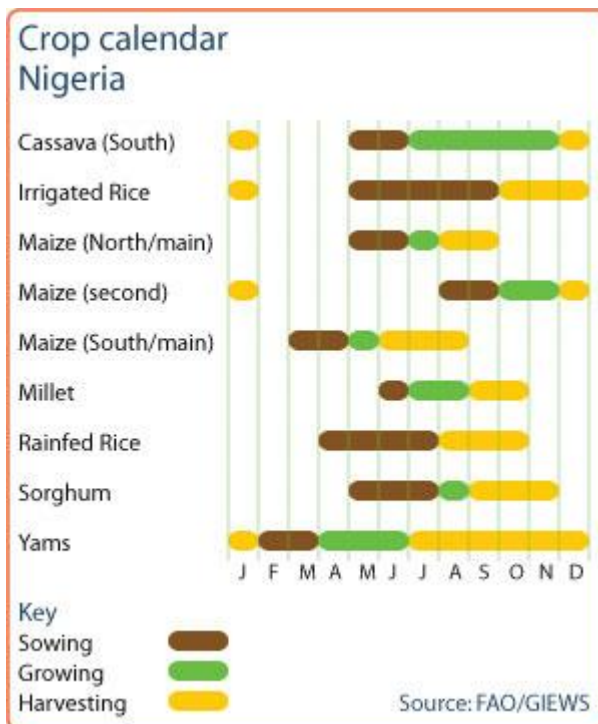
High import dependency persists

In 2012, the Government launched the Agriculture Transformation Agenda (ATA) to reduce the country's reliance on food imports by increasing production of the five key crops, including rice, sorghum and cassava. A number of import-substitution measures were introduced to support domestic production, including the mandatory inclusion of 10 percent of cassava flour in bread. Input availability and access were also supported in the framework of the ATA, which aims to make Nigeria self-sufficient in rice. The Central Bank of Nigeria recently banned importers from accessing foreign-exchange markets in 41 categories of items, including rice. These import-substitution measures have amplified informal cross-border imports from neighboring coastal countries.

In spite of these measures, Nigeria remains a food deficit country with cereal imports (mostly rice and wheat), forecast to exceed 7 million tonnes in 2016. The country is still the largest rice importer in Africa.

Deteriorating food security situation in northern Nigeria and neighbouring countries

The continued conflict in the northern part of the country has resulted in widespread disruption in agricultural and marketing activities and has caused massive displacement. According to OCHA, about 2.2 million people have been internally displaced as of October 2015. In addition, over 105 000 people are estimated to have left Nigeria for the Diffa



Region of Niger, while nearly 57 000 people have taken refuge in northern Cameroon. The conflict has disrupted commodity movements leading to higher price levels and volatility in parts of the northeast. About 4.4 million people, located mostly in Borno and Yobe, are estimated to be in Phase 3: "Crisis" and above, according to the last Cadre Harmonisé analysis conducted in the country.



Reference Date: 16-February-2015

FOOD SECURITY SNAPSHOT

- Preliminary estimates for 2014 harvest point to an above-average cereal production
- Cereal prices are on decline, reflecting adequate supplies
- Humanitarian situation continues to deteriorate in northern parts, as a result of continuing civil conflict

Adequate rains in 2014 resulted in good cereal production

Harvesting of the 2014 cereal crops was completed in January 2015. Favourable rains benefited crop development in the major producing states of the country. Although civil insecurity led to significant population displacement, disrupting farming activities in Borno, Yobe and part of Adamawa State, preliminary estimates point to an above-average 2014 cereal production. FAO tentatively forecasts the country's cereal output in 2014 at about 24.4 million tonnes, 12 percent above the previous five-year average.

An above average production was already gathered in 2013. The 2013 aggregate cereal production was estimated at some 23 million tonnes, an increase of 10 percent over the 2012 floods-affected output.

Good supplies from the new 2014 harvest have resulted in significant price declines for coarse grains. In the main northern Kano market, maize prices dropped by 20 percent between September and December 2014.

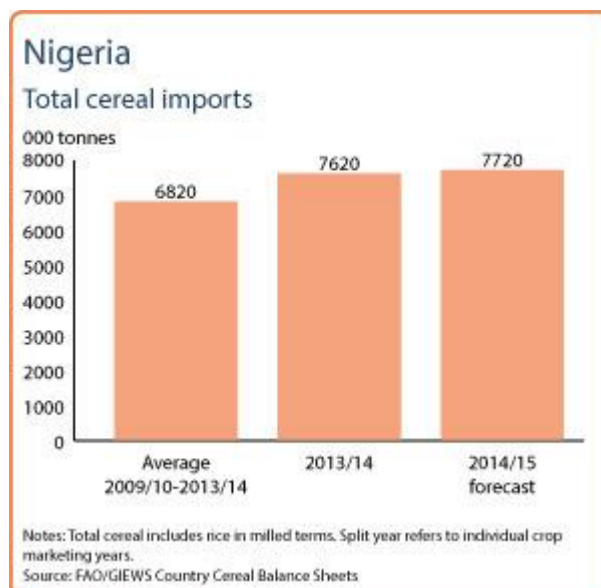
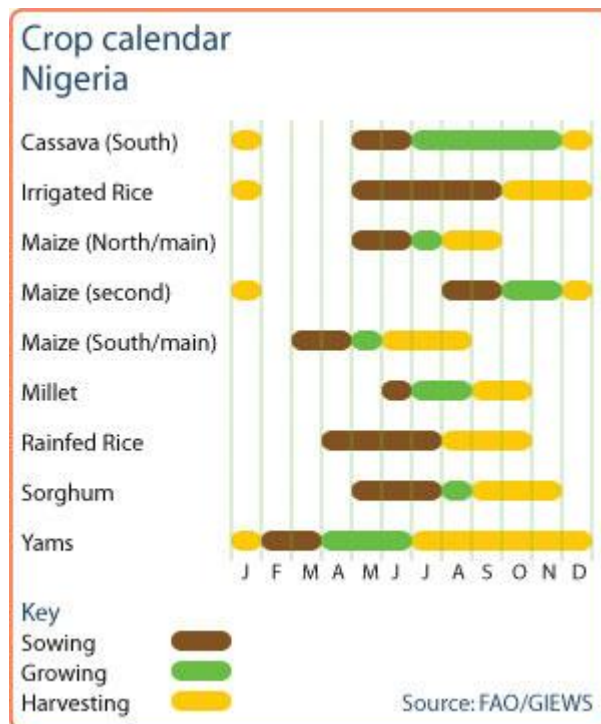
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In spite of these measures, Nigeria remains a food-deficit country with cereal imports (mostly rice and wheat), forecast to exceed 7.5 million tonnes in 2015. The country is still the largest rice importer in Africa.

Deteriorating food security situation in North and neighbouring countries

Following the escalating civil insecurity and conflict in northern Nigeria, the humanitarian situation continues to deteriorate resulting in an increasing number of refugees in neighbouring countries. There are over 1.5 million Internally Displaced Persons (IDPs) in the six states of the



Northeast, while several other thousands have sought refuge in neighbouring countries (Cameroon, Chad and Niger). Over 100 000 people are estimated to have left Nigeria for the Diffa region of Niger while about 80 000 people have taken refuge in northern Cameroun, as of early February. An additional 17 000 Nigerians fled to Chad over the past few weeks and the rate of population displacement is increasing according to OCHA. The escalating conflict has also disrupted commodity movements leading to higher price levels and volatility in parts. The crisis is also likely to affect crop production this year in several regions.



Reference Date: 23-May-2014

FOOD SECURITY SNAPSHOT

- Cereal production recovered significantly in 2013
- Maize prices exhibited high volatility in recent months, mainly reflecting the impact of civil insecurity
- The humanitarian situation continues to deteriorate in the northern part of the country, as a result of continuing civil conflict

The cropping season has started on time in the South

Seasonal rainfall has started in April in southern parts of the country, where planting of the first maize crop is underway. Planting activities are expected to progressively move northwards with the onset of the rains. The escalating civil insecurity in northern parts of the country is reportedly causing increasing number of farmers to abandon their farms, which may negatively affect planted area and difficulties in accessing inputs which may potentially lower yields.

Last year, regular and well-distributed rains benefited crop development in the major agricultural producing areas of the country. The official estimate puts the 2013 aggregate cereal production at some 24 million tonnes, an increase of 11 percent over the 2012 floods-affected output.

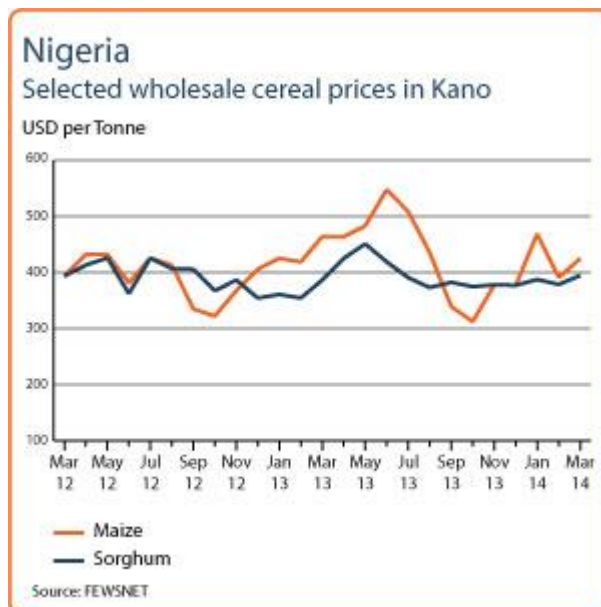
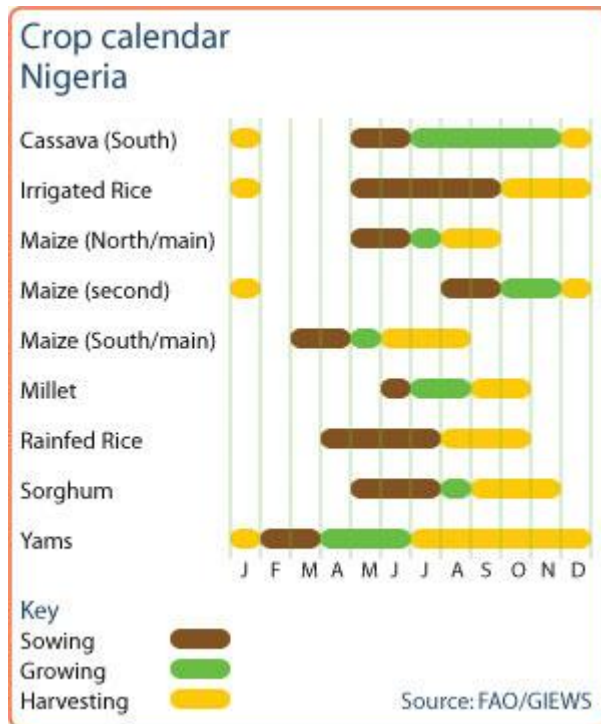
Maize prices exhibited high volatility in recent months

The good 2013 cereal harvest put downward pressure on prices across the country resulting in the fall of maize prices by 41 percent from July to October 2013 in the main northern Kano market. However, prices have begun to increase significantly since November 2013 and by March 2014 were close to last year's flood-affected levels. Trade disruptions, resulting from the escalating insecurity in northern parts of the country, have been sustaining price instability despite the 2013 good cereal production.

High import dependency persists

In 2012, the Government launched the Agriculture Transformation Program (ATA) to reduce the country's reliance on food imports by increasing production of the five key crops, including rice, sorghum and cassava. A number of import-substitution measures were introduced to support domestic production. For example, the mandatory inclusion of 10 percent of cassava flour in bread was implemented as of 2012, with the rate of substitution expected to reach 40 percent by 2015. ATA also aims to make Nigeria self-sufficient in rice by 2015, when imports will be banned. To that end, rice import duties on imported polished and milled rice have increased dramatically to 40 and 110 percent, respectively. The high rice import tariffs in Nigeria have amplified informal cross-border imports from neighbouring coastal countries. Input availability and access were also supported in the framework of the ATA.

In spite of these measures, Nigeria remains a food-deficit country with



cereal imports (mostly rice and wheat), forecast to exceed 6 million tonnes in 2014. The country is still the largest rice importer in Africa.

Deteriorating food security situation in the North

Following the escalating civil insecurity and conflict in northern Nigeria, the humanitarian situation continues to deteriorate resulting in an increasing number of refugees in neighbouring countries. According to UNHCR, some 40 000 Nigerians have taken refuge in the Diffa Region of Niger as of late April. The escalating conflict has also disrupted commodity movements leading to higher price levels and volatility. The crisis is also likely to affect crop production in several regions this year.

The United Nations and humanitarian partners launched a three-year Regional Strategic Response Plan (RSRP) earlier this year to provide aid to millions of people in nine countries of the Sahel belt. The country plan for Nigeria is seeking to mobilize USD 75 million to provide food and non-food assistance to over 6 million people in the northern part of the country.

GIEWS Country Brief

Nigeria



Reference Date: 03-June-2013

FOOD SECURITY SNAPSHOT

- Torrential rains from August through October 2012 caused flooding and damaged crops and livestock in several regions
- Reduced supplies and trade disruption led to significant food price increases in parts

The start of the 2013 rainy season has been somewhat erratic in the North

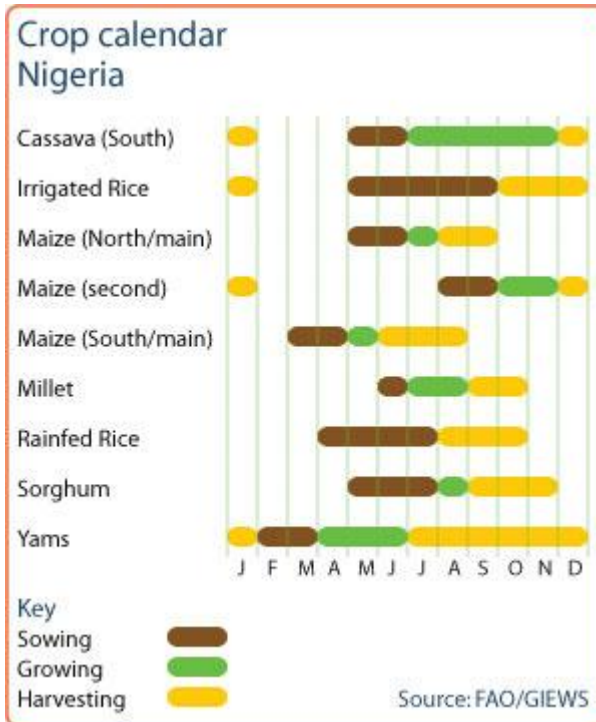
Planting of the main maize crop was completed in May in the South under satisfactory weather conditions. In the North, which has only one rainy season, planting of coarse grains is underway. Precipitation has been irregular in parts of central and northern Nigeria, which may affect planting activities.

In 2012, heavy rains damaged crops and livestock in several parts of the country

Harvesting of the 2012 cereal crops was completed last January. Several Nigerian states have been affected by torrential rains from August through October 2012 which led to substantial flooding and resulted in considerable human casualties and damage to crops and livestock. An inter-agency assessment carried out in November 2012 in 14 most affected states estimated that about 5.7 million animals have been killed and nearly 2 million hectares of crop land (rice, sorghum, maize, cassava and yam) were lost. Rice and maize crops have been most affected.

Food prices on the increase due to civil strife and lingering effects of last year's floods

The impact of reduced supplies from last year's flood-affected crop is being compounded by the ongoing civil insecurity in the northern part of the country that resulted in serious disruptions in commodity movement and cross-border trade flows. As a result, coarse grains prices increased significantly over the past few months. For example in Kano, the most important city in the north of the country, maize prices have been following an upward trend since October-November 2012, and in April 2013 they were about 13 percent above last year's level. Market disruption in northern Nigeria also led to substantial price rises in most neighboring countries, notably in Niger and Benin.



GIEWS Country Brief

Nigeria



Reference Date: 15-January-2013

FOOD SECURITY SNAPSHOT

- Abundant rains in the major producing regions led in 2012 to increased crop production at national level
- However, torrential rains from August through October caused flooding and damaged crops and livestock in several regions

Heavy rains damaged crops and livestock in several parts of the country in 2012

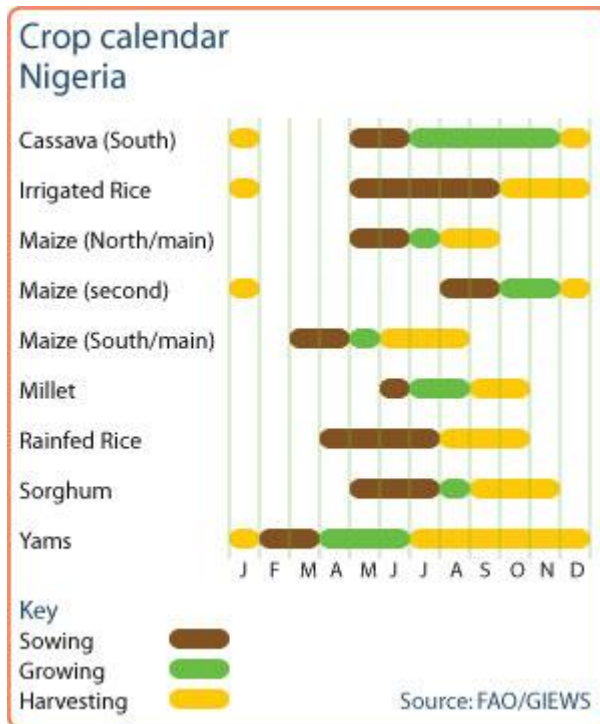
Harvesting of the 2012 cereal crops is almost complete. Several Nigerian states have been affected by torrential rains from August through October 2012 which led to substantial flooding and resulted in considerable human casualties and damage to crops and livestock. An inter-agency assessment carried out in November 2012 in 14 most affected states estimated that about 5.7 million animals have been killed and nearly 2 million hectares of crop land (rice, sorghum, maize, cassava and yam) lost, which may have a significant impact on the final crop production estimates. Rice and maize crops have been most affected.

Official estimates point to increased cereal production at national level

However, the joint field evaluation survey conducted by the National Agricultural Extension and Research Liaison Services (NAERLS) and the Federal Department of Agriculture in August-September 2012 estimated about 5 percent increase in cereal production compared to 2011. This joint assessment did not take into account the full impact of the flooding which lasted until October.

Cereal prices declined reflecting improved harvest positions

Reflecting ample supplies in Nigeria and across the subregion, markets are well supplied and cereal prices have declined significantly across the country. For example, following a peak in May 2012, maize prices dropped by over 25 percent in October before increasing slightly in November in Kano, in the northern part of the country.



Reference Date: 24-August-2012

FOOD SECURITY SNAPSHOT

- Early prospects for the 2012 cereal crops are favourable
- Cereal prices remain at high levels in spite of recent declines

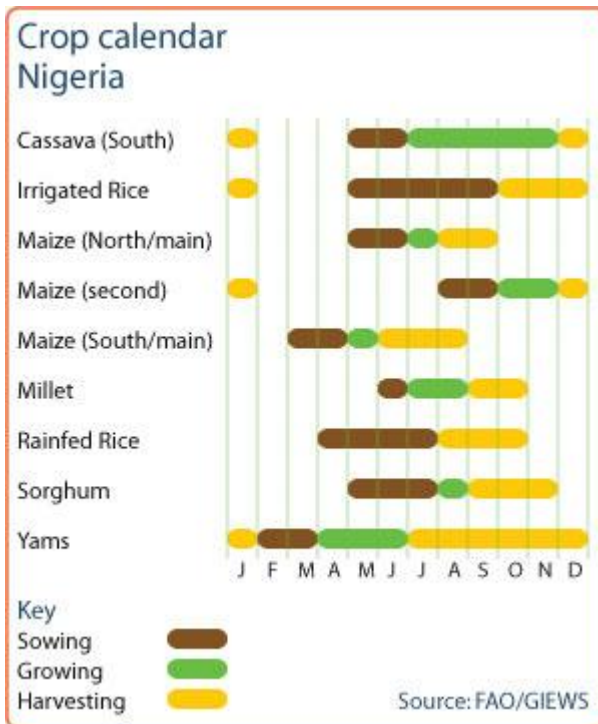
Prospects for the 2012 cereal crops are favourable

Harvesting of the main maize crop is underway in the South. In the North, which has only one rainy season, harvesting of coarse grains will start in September. Precipitation has been generally widespread since the beginning of the growing season in April/May and overall crop prospects are favourable. However, torrential rains from early August led to substantial flooding and resulted in considerable human casualties and damage to crops and livestock, notably in Plateau State. Flooding risk remains high across Nigeria as heavy rains are forecasted to continue over the coming weeks.

Last year, although several northern States along the Niger border witnessed a dry spell during July/August, the aggregate cereal production in 2011 was estimated at about 27 million tonnes, similar to previous year's average crop. Favourable rains benefited crop development in the major producing states of north central Nigeria but in the northern States, yields were reduced by up to 20-30 percent.

Despite last year's good harvest, 2012 prices of maize and sorghum remain at high levels

Cereal prices have been following an upward trend since early 2011 due to a series of factors including the reduction in fuel subsidies, that led to substantial increase in transport costs; civil strife and insecurity in the northern part of the country; strong cereal demand from the brewing and poultry sectors combined with reduced production and supplies in the Sahel belt. However, the beginning of the harvesting season including in neighbouring coastal countries and overall favourable crop prospects in the subregion pushed prices down in recent months. For example, in the Dawanau international market in Kano, the biggest in western Africa, prices of maize and sorghum declined in June by 12 percent and 15 percent, respectively compared to a month earlier.



Reference Date: 26-March-2012

FOOD SECURITY SNAPSHOT

- Favourable rains in the major producing areas resulted in good crop production in 2011.
- Cereal prices in 2012, however, are higher than in 2011.

Adequate rains in 2011 result in good cereal production

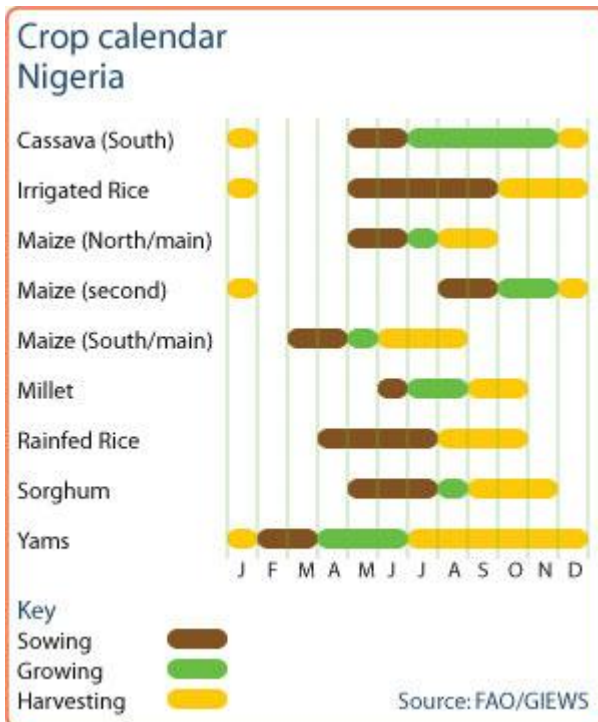
Harvesting of the 2011 cereal crops was completed in January 2012. Favourable rains benefited crop development in the major producing states of north central (including Gombe, Plateau, Kaduna, Niger and Nassarawa States). However, the northern parts of Sokoto, Kebbi and Katsina states in the north-west and Yobe and Borno states in the north-east along the borders with Niger and Chad, witnessed a dry spell during July / August, which resulted in re-planting of crops and thus reduced yields by up to 20-30 percent.

The aggregate cereal production in 2011 is estimated at about 26.7 million tonnes, similar to previous year's average crop. Production of yam and cassava, the most important staple crops in the south, is estimated at 37 and 52 million tonnes respectively, also similar to the 2010 output.

The 2012 cropping season normally starts in April and land preparation is already underway in the South for planting the main maize crop,

Despite the good harvest, 2012 prices of maize and sorghum remain higher than in 2011

A series of factors resulted in higher food prices in the last several months of 2012 compared to 2011. The reduction of fuel subsidies that led to substantial increase in transport costs; civil strife and insecurity in the northern part of the country; as well as reduced cereal production and supplies in the Sahel belt are among the reasons behind the high food prices. For example, in the Dawanau international market in Kano, the biggest in western Africa, prices of maize and sorghum In January 2012 were 22 percent above their levels of the same month last year.



Reference Date: 11-January-2012

FOOD SECURITY SNAPSHOT

- Favourable rains in the major producing areas resulted in good crop production.
- However, millet production declined by about 8 percent due to localized dry spells in the extreme north
- As a result, maize and sorghum prices are decreasing, while millet prices have remained at high levels

Adequate rains in major producing areas resulted in a good cereal production at national level

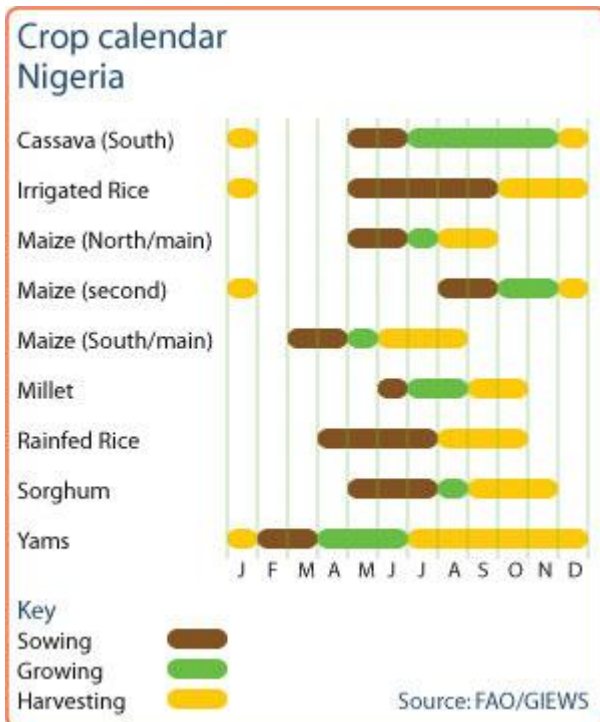
Harvesting of the 2011 cereal crops was completed in November/December 2011 in the main producing parts of the country. Favourable rains benefited crop development in the major producing states of north central (including Gombe, Plateau, Kaduna, Niger and Nassarawa States). However, the northern parts of Sokoto, Kebbi and Katsina states in the north-west and Yobe and Borno states in the north-east along the borders with Niger and Chad, witnessed a dry spell during July / August, which forced farmers to re-plant to replace wilted crops and reduced yields by up to 20-30 percent.

As a result, the joint field evaluation survey conducted by the National Agricultural Extension and Research Liaison Services (NAERLS) and the National Programme for Agricultural and Food Security in September 2011 estimated an 8 percent decline in millet production compared to 2010. By contrast, good maize and sorghum crops, similar to the previous year's good output, were gathered.

The aggregate cereal production in 2011 was estimated by a joint CILSS/FAO mission that visited the country last October, at about 26.5 million tonnes, similar to previous year but 5. percent above average. Production of yam and cassava, the most important staple crops in the south, is estimated at 37 and 52 million tons respectively, also similar to 2010 output levels.

Prices of maize and sorghum started declining while millet prices remained high

In the Dawanau international market in Kano, the biggest in western Africa, prices of maize and sorghum were firm or increasing in recent months, reflecting increased demand from neighbouring countries where this year's harvests were sharply reduced. In November they declined respectively by 5 and 20 percent, as a result of the increased supplies from the newly harvested crops. By contrast, in Dandume market, located in the northern Katsina state, prices of millet increased unseasonably by 19 percent from October to November, and are 24 percent higher than in November 2010, due to the reduced millet harvest



Reference Date: 20-April 2011

FOOD SECURITY SNAPSHOT

- The 2011 cropping season has started in the South, while seasonably dry conditions still prevail in northern states
- Favourable rains in the major producing regions led to increased crop production at national level in 2010
- However, torrential rains last August and September in the extreme north of Nigeria caused flooding and damaged cereal crops
- A satisfactory food availability is expected during the current 2011 (January/December) marketing year

The 2011 cropping season has started in the South

Seasonal rains commenced in March in the southern part of the country, allowing land preparation and maize planting to start. Dry conditions are still present in the North, with the rainy season expected to begin in May.

Last year, good rains in major producing areas contributed to increased cereal production at national level

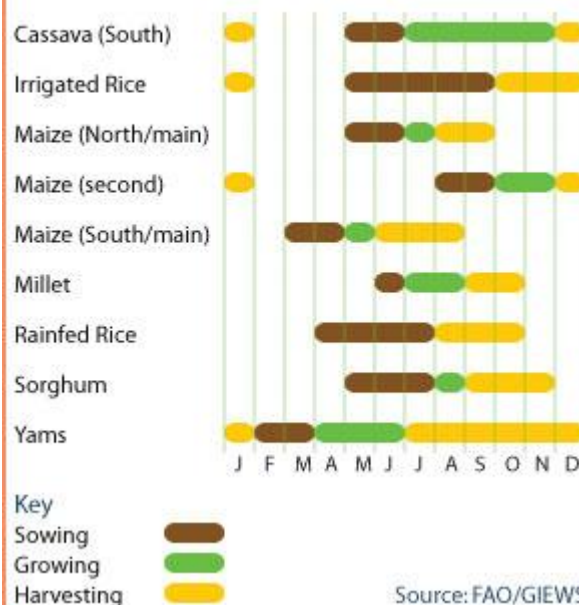
Favourable rains benefited crop development in the major producing states of north central parts of the country (including Gombe, Plateau, Kaduna, Niger and Nassarawa States). As a result, the joint field evaluation survey conducted by the National Agricultural Extension and Research Liaison Services (NAERLS), the National Food Reserve Agency (NFRA) and the Federal Department of Agriculture in August 2010 estimated 13.4 percent and 1.3 percent increases in millet and sorghum production, respectively, compared to 2009. Maize and rice production is also estimated to expand by about 4 percent. Overall, the aggregate cereal production in 2010 has been estimated at about 26.8 million tonnes, 4 percent up on the previous year, reflecting generally favourable growing conditions during the rainy season.

The high level of food production, coupled with favourable harvests in the neighbouring countries, particularly in Niger, Chad and Cameroun, is expected to lead to a satisfactory food availability during the 2010/2011 marketing year (January-December)

However, heavy rains damaged crops in several extreme northern states

Several States in the northern Nigeria witnessed an unfavourable pattern of rainfall in 2010. This included a late onset of the rainy season, prolonged dry spells, and torrential rains and flooding of farmlands in August and September. The floods have caused considerable casualties and damage to houses, infrastructure, crops and livestock in several areas. The hardest hit States are Jigawa, Kebbi and Sokoto, but Yobe, Kano, Katsina, and Zamfara were also affected. The floods affected agricultural production in about 700 villages, with over 500 000 hectares of cropped farmlands destroyed, and about 68 000 livestock lost, according to the results of an assessment carried out by FAO in November last year. The most affected crops are rice,

Crop calendar Nigeria



Nigeria

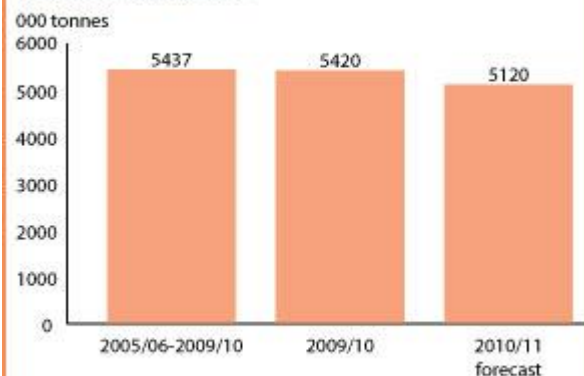
Cereal production

	2005-2009 average	2009	2010 estimate	change 2010/2009
	000 tonnes			percent
Sorghum	9227	8713	8824	1
Maize	7339	8957	9343	4
Rice (paddy)	3855	4300	4469	4
Others	3960	3702	4182	13
Total	24381	25672	26818	4

Note: percentage change calculated from unrounded data.
Source: FAO/GIEWS Country Cereal Balance Sheets

Nigeria

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

sorghum, cowpea and vegetable. Millet crop losses were limited because harvesting of that crop was almost completed at the time of the floods.

Ample supplies keep cereal prices low

Reflecting the good harvest, markets are well supplied and cereal prices have declined significantly across the country. For example, sorghum prices in Kano, in the northern part of the country, in February 2011 were 18 percent lower than in February 2010. At the national level, the year-on-year inflation rate in the food sector declined from 15.1 percent in August 2010 to 10.3 percent in January 2011. However, recent developments in the international food market may lead to higher inflationary pressure on the domestic food markets.

Reference Date: 11-February-2011

FOOD SECURITY SNAPSHOT

- Favourable rains in the major producing regions led to increased crop production at national level.
- However, torrential rains last August and September in the extreme north of Nigeria caused flooding and damaged cereal crops.
- A satisfactory food availability is expected during the current 2011 (January/December) marketing year

Planting season of maize in Southern Nigeria about to start

Seasonably dry conditions prevail. Land preparation for the first maize crop is underway in the South. Plantings will start with the arrival of rains, usually in April.

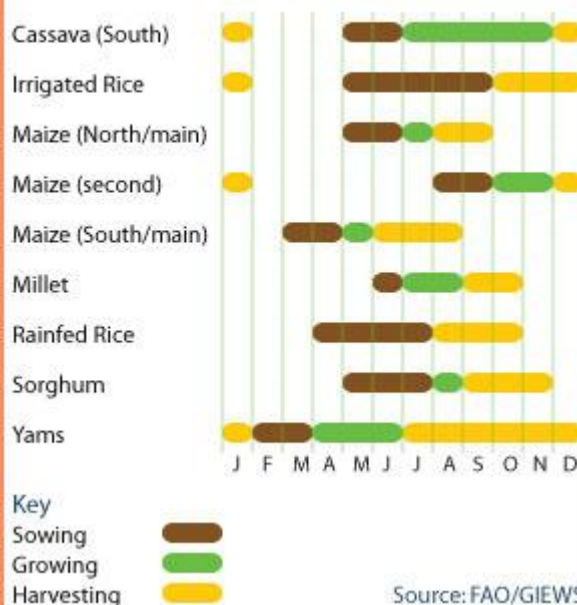
Heavy rains damaged crops in several extreme northern states in 2010

Several States in the northern Nigeria witnessed an unfavourable pattern of rainfall in 2010. This included a late onset of the rainy season, prolonged dry spells, and torrential rains and flooding of farmlands in August and September. The floods have caused considerable casualties and damage to houses, infrastructure, crops and livestock in several areas. The hardest hit States are Jigawa, Kebbi and Sokoto, but Yobe, Kano, Katsina, and Zamfara were also affected. The floods affected agricultural production in about 700 villages, with over 500 000 hectares of cropped farmlands destroyed, and about 68 000 livestock lost, according to the results of an assessment carried out by FAO in November last year. The most affected crops are rice, sorghum, cowpea and vegetable. Millet crop losses were limited because harvesting of that crop was almost completed at the time of the floods.

Good rains in major producing areas contributed to increased cereal production at national level

However, good rains benefited crop development in the major producing states of north central parts of the country (including Gombe, Plateau, Kaduna, Niger and Nassarawa States). As a result, the joint field evaluation survey conducted by the National Agricultural Extension and Research Liaison Services (NAERLS), the National Food Reserve Agency (NFRA) and the Federal Department of Agriculture in August 2010 estimated 13.4 percent and 1.3 percent increases in millet and sorghum production, respectively, compared to 2009. Maize and rice production is also expected to expand by about 4 percent. In addition, a good outturn is forecast for crops that are concentrated in the Middle Belt and Southern Zones of the country, such as cassava, cocoyams and yams. Overall, the aggregate cereal production in 2010 has been estimated at about 26.8 million tonnes, 4 percent up on the previous year, reflecting generally favourable growing conditions during the rainy season.

Crop calendar Nigeria



Nigeria

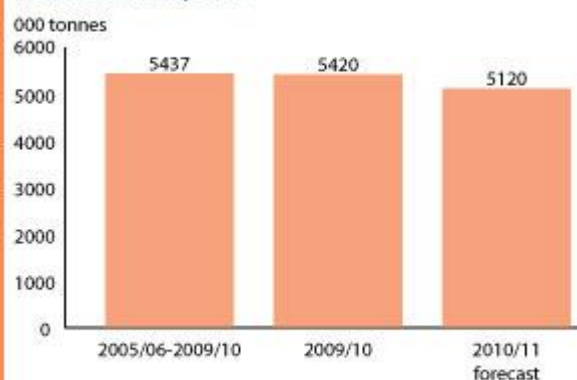
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Nigeria

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

The high level of food production, coupled with favourable harvests in the neighbouring countries, particularly in Niger, Chad and Cameroun, is expected to lead to a satisfactory food availability during the 2010/2011 marketing year (January-December)

Ample supplies keep cereal prices low

Reflecting the good harvest, markets are well supplied and cereal prices have declined significantly across the country. For example, following a peak in May 2010, maize prices dropped by over 32 percent in December in Kano, in the northern part of the country. At the national level, the year-on-year inflation rate in the food sector declined from 15.1 percent in August to 12.7 percent in December. However, recent developments in the international food market may lead to higher inflationary pressure on the domestic food markets.

Reference Date: 17-October-2010

FOOD SECURITY SNAPSHOT

- Torrential rains in the north cause flooding, damaging mainly sorghum and millet crops
- New supplies from the recent harvest lower market prices

Heavy rains damage crops in several northern and southern states

Torrential rains during late August, as well as release of water from dams, led to localised flooding and resulted in loss of mainly millet and sorghum crops in several northern states, notably in Jigawa, Kebbi and Sokoto. Rainfall levels fell in mid-September allowing some flood-resistant crops to recover from the excessive moisture levels received earlier in the month. By contrast low precipitation levels in mid-August and the second dekad of September in the north-east (Yobe and Borno) also hindered crop development; the continuation of irregular rains may affect crop maturity and impact yields in these areas.

In the south and centre, the first maize harvest was completed in August and in general the rains were more regular than compared to the north, with some deficits recorded at the end of August and beginning of September. Crop production is reported to be good; however, during the beginning of August heavy rains caused some flooding and consequently led to localised losses of yam and maize crops in Lagos, Bayelsa and Delta states. Dry spells in Oyo, Osun and Ogun also led to an estimated drop in cereal production in the south-west.

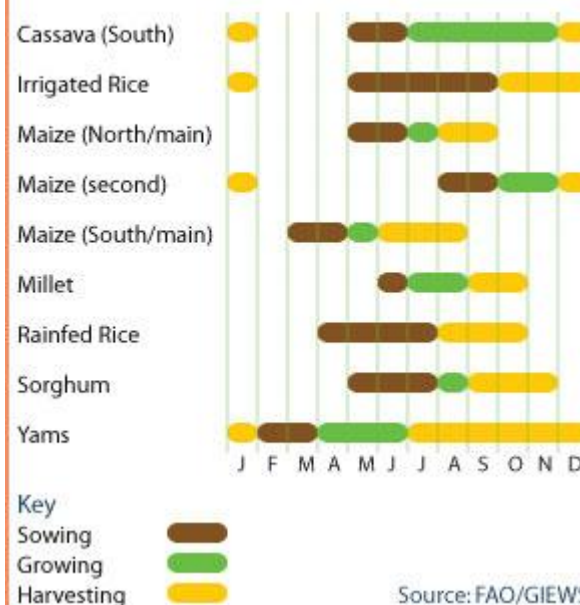
Despite localised production losses in the far north and south, production at the national level is expected to be similar for maize compared to last year; however, given the irregular weather conditions in the main millet and sorghum producing states in the north, national production of these crops are likely to be affected. Overall, cereal production is expected to be similar to the output in the previous year.

New supplies arrive on the market contributing to lower market prices

At the national level, the Composite Food Price Index rose by 2 percent between July and August, and remains 15 percent above the level recorded one year earlier. The increase is predominantly attributed to a rise in the price of yams, meat, fish, cooking oil, fruits and vegetables. Prior to the harvest period, millet and maize prices in Kano during July were approximately 12 percent above average (2005-09) for that month. However, as new supplies from the recent harvest reach the market prices have begun to exhibit a decline, following annual seasonal patterns. In August, prices of maize were about one-third lower than price levels last year.

The Nigerian naira has stabilised during 2010, following a period of depreciation in 2008 and 2009; however, the Imported Food index of the CPI increased by about 10 percent between the beginning of the year and August.

Crop calendar Nigeria

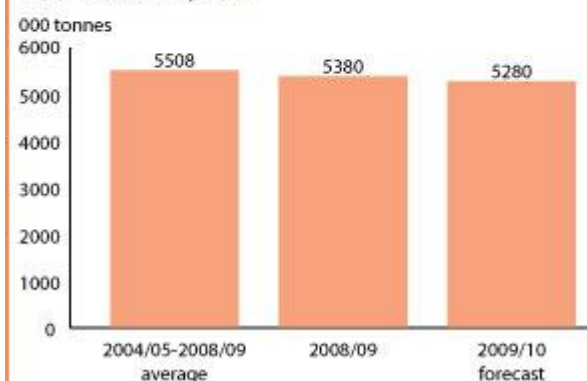


Nigeria Cereal production

	2004-2008 average	2008	2009 forecast	change 2009/2008
	000 tonnes			percent
Sorghum	9200	9318	8712	-7
Maize	6661	7970	8759	10
Millet	3927	4167	3479	-17
Others	3800	4302	4678	9
Total	23588	25757	25628	-1

Note: percentage change calculated from unrounded data.

Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 12-April-2010

FOOD SECURITY SNAPSHOT

- Light rains recorded in southern regions in March
- In 2009, reduced rainfall in the far north and flooding in the south negatively affect crop yields.
- Cereal prices stabilize in the north, but national food prices increase

Heavier rains recorded in south-west

The onset of the 2010 rainy season in the south (March-October) was marked by moderate rains, with heavier precipitation recorded in the south-west. Land preparation and maize planting are underway in southern states, while dry conditions are still present in the north, with the rainy season expected to begin in May.

Dry weather lowers cereal yields in 2009 in the far north

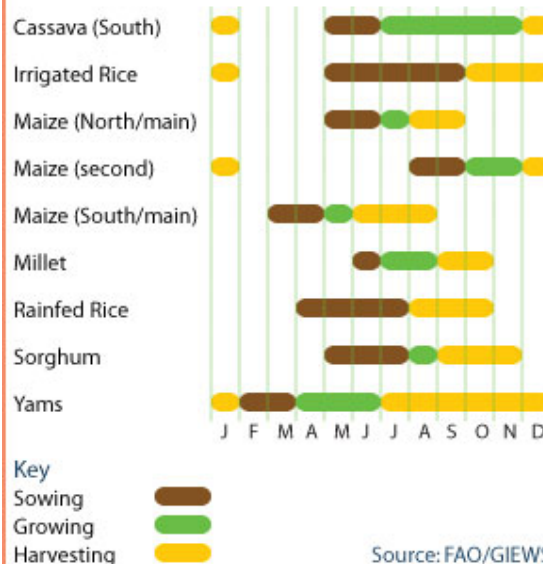
Localised flooding in the south and prolonged dry conditions in the far north contributed to a reduced harvest for the 2009/10 season. Millet and sorghum production, predominantly centred in the northern states, declined by 16.4 percent and 6.5 percent respectively, compared to the previous season, as reported by the National Agricultural Extension and Research Liaison Services (NAERLS), the National Food Reserve Agency (NFRA) and the Federal Department of Agriculture. By contrast, both rice and maize production performed better, increasing by 9 and 10 percent, respectively, over previous year's output.

The irregular rains have also led to poor pastures and low water reserves in the far north, causing deterioration in livestock body conditions. Consequently, this has contributed to lowering their market value compared to levels one year earlier. High market supply of livestock, due to increasing costs of maintaining animals, has also contributed to the lower prices. Furthermore, the high cereal prices in the far north are worsening the terms of trade for pastoralists, who are particularly vulnerable to the present conditions as they are reliant on livestock both as a source of income and food.

Fresh supplies help to stabilise cereal prices in the North

At the national level, the Composite Food Price Index rose by 0.8 percent between January and February, and remains 14 percent above the level recorded in the same month in 2009. Rises in the price of rice, gari, yam and meat, to include a few, have contributed to the recent increase in the food price index. Strikes by food and livestock traders in mid-March, protesting against the collection of multiple taxes along trade routes, caused a disruption in the food supply chain adding to the increase in prices in the south-western states. However, cereal prices in northern states have been generally stable in the first months of 2010, but remain at a high level. This has been attributed to new supplies to the market with farmers releasing their stocks to purchase seeds and fertiliser for the forthcoming season.

Crop calendar Nigeria

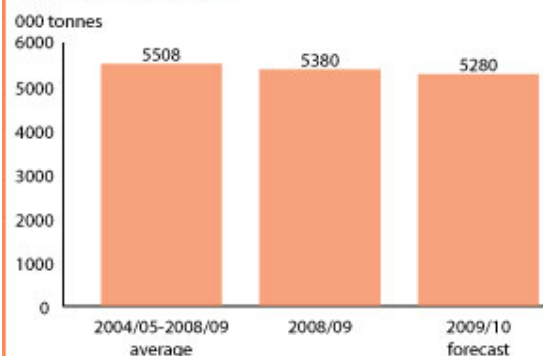


Nigeria Cereal production

	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes			percent
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Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Naira depreciation facilitates high trade volumes

The decline in value of the Nigerian naira has resulted in an above normal level of trade in millet and sorghum from northern Nigeria to southern Niger, during the last quarter of 2009 and the beginning of 2010. High demand from Niger, in response to the low national cereal harvest in 2009, has also fuelled the large flows of cross-border trade. However, the slight appreciation of the naira in March has reportedly lowered trade flows, compared to the levels recorded in the preceding months.

Increases in cereal prices aggravates food insecurity conditions

Reports indicate that the lean season, normally between May and July in the south has begun early due to depleted market and household food supplies. Increased cereal prices have affected food access to poorer households, while the depletion of household food stocks has increased their reliance on markets. A similar situation is also reported in the far north, following the poor 2009 harvest, which has led to an earlier than normal depletion of household food stocks in localised areas.

Reference Date: 18-January-2010

FOOD SECURITY SNAPSHOT

- Reduced rainfall in the far north and flooding in the south negatively affect crop yields
- Cereal prices gradually increase in 2009 throughout the country, and generally remain higher in northern markets
-

Inadequate rains lower crop yield in far north

Most States in the far northern part of the country witnessed an unfavourable pattern of rainfall. This included a late onset of the rainy season, prolonged dry spells, and unusually late rains in late October/early November, potentially affecting crop maturity and drying. Torrential rains and flooding of farmlands, particularly in the South, also resulted in localized crop losses in July and August. Although regular and well distributed rains benefited crop development in the North Central areas (including most of Gombe, Plateau, Kaduna, Niger and Nassarawa States), distribution of subsidised fertilizer by federal and state governments covers less than 30 percent of requirements. As a result, the joint field evaluation survey conducted by the National Agricultural Extension and Research Liaison Services (NAERLS), the National Food Reserve Agency (NFRA) and the Federal Department of Agriculture in 2009 estimated 16.4 percent and 6.5 percent declines in millet and sorghum production, respectively, compared to 2008. By contrast, maize production is forecast to increase by 10 percent, while rice output is expected to expand by 9 percent. An average output is forecast for crops that are concentrated in the Middle Belt and Southern Zones of the country, and less dependent on fertilizer, such as cassava, cocoyams and yams.

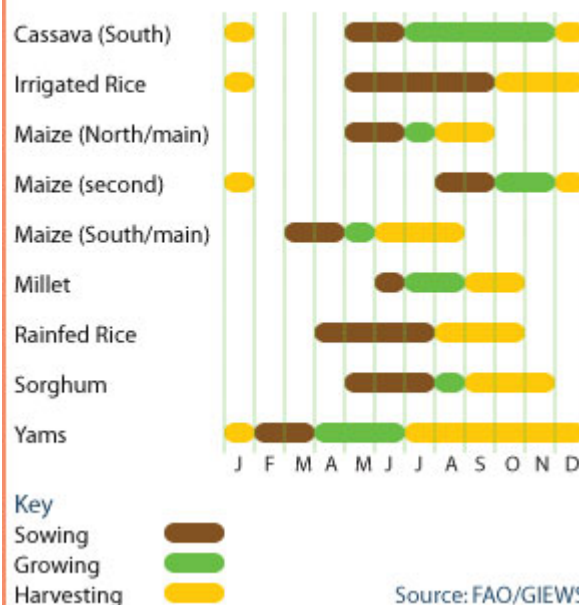
Cereal shortages in the north cause a rise in prices

As a result of the lower output, food prices continue to remain at a higher level compared to last year. The Composite Food Index (CFI) has been increasing since the beginning of 2009, but at a diminishing rate between July and October 2009, and remains 13.5 percent higher than the same month in 2008. Regional disparities exist, particularly between northern and southern states, where prices of food staples in the far north are generally higher when compared to prices in southern markets. This is due to the lower market availability, as a result of production shortages, and high transportation costs. In Dawanau International Grains Market in Kano (Nigeria), the biggest in the subregion, the price of millet and sorghum in early November was 40 percent higher than its level of November 2007. This could lead to a new rise in cereal prices across the subregion with a serious negative impact on rural food-deficit households and urban consumers.

Government provides assistance to vulnerable households

The government distributed approximately 25 000 tonnes of cereal during September, mostly to the states bordering Niger in the far north, to help stabilise cereal availability and mitigate potential price increases. Further assistance to stabilise cereal availability is expected in 2010.

Crop calendar Nigeria



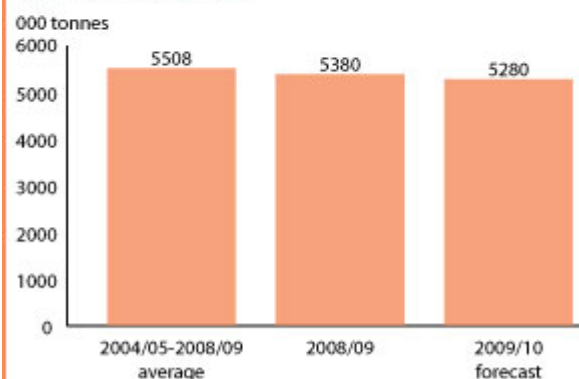
Nigeria

Cereal production

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Total cereal imports



Notes: Total cereal includes rice in milled terms. Split year refers to individual crop marketing years.
Source: FAO/GIEWS Country Cereal Balance Sheets

Reference Date: 24-September-2009

FOOD SECURITY SNAPSHOT

- Unfavourable crop prospects in the far north and southern coastal regions
- Government continues to support agriculture
- Food prices remain high in spite of last year's good crop

Prospects for the 2009 cereal crops to be harvested from September are unfavourable in the far north and coastal regions in the south

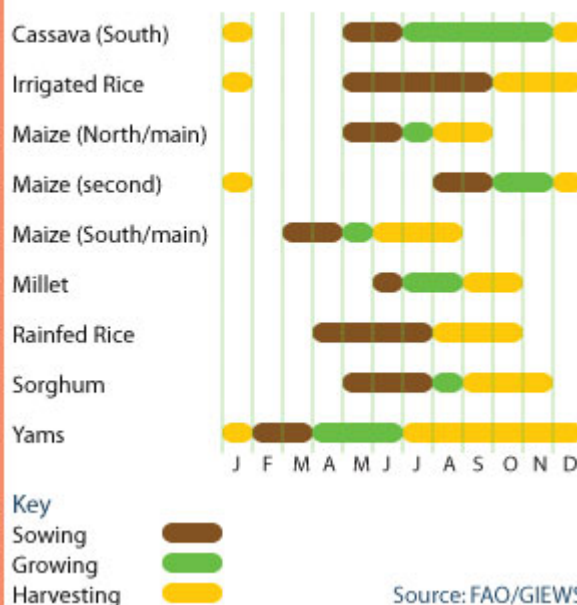
Early harvesting of the main maize crop is nearing completion in the south. Significant rains during the beginning of May in the north led to farmers planting cereal crops earlier than normal. However, subsequent below average rainfall from June to the first decade of August led to large moisture deficits in the northern regions bordering Niger (Sokoto, Zamfara, Katsina, Jigawa, Yobe and Borno). High temperatures compounded the effects of low cumulative rainfall and consequently there was localised failure of the first sown crops. By contrast, rains began normally in the south, confirmed by satellite based estimates revealing high moisture levels in central and southern regions, supporting seasonal planting activities and early crop development. However, heavy rainfall in several regions including Federal Capital Territory, Lagos, Kaduna, Gombe, Niger, Benue, Nasarawa, Zamfara, Jigawa, Rivers, Delta, and Bayelsa states caused flooding in July and August, washing away fertilizers applied to crops and causing water-logging. This is likely to reduce production levels. Moreover, due to the delayed rains and initial dry conditions in the northern part of the country, rains will need to continue through October to allow crops to reach full maturity.

The high cost of fertilizers and seeds – 50 kg of fertiliser is 14 percent higher in August 2009 compared to a year earlier in Zamfara state – are expected to constrain cereal production of poorer households. The need to replant crops in the far north – following the early failure of millet crops in some areas – will force poorer farmers to reduce the cultivated area and/or purchase lower yielding seeds for the second sowing due to high input costs. This is likely to reduce households' crop production and increase costs, as well as constrain their purchasing power, lowering food access. Consequently poorer households will remain moderately food insecure until the main harvests reach the market at the end of September 2009. The Government continues to implement a number of policies to boost national agriculture production and mitigate the high input costs, including subsidising some fertiliser and extending farmers' credit, illustrated by an increase in the number of loans guaranteed through the Agricultural Credit Guarantee Scheme (ACGS) by 34 percent in the first quarter of 2009 relative to 2008.

Food prices remain high in spite of a significant decline from their peak of June-July 2008

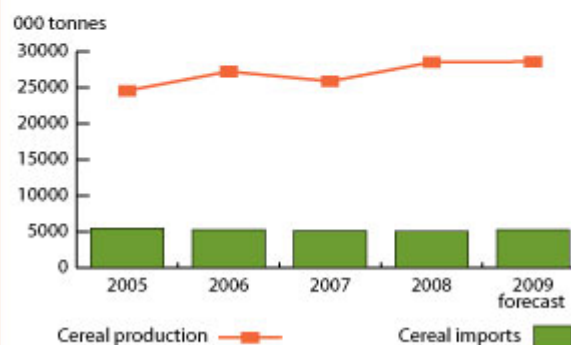
The Composite Food Index (CFI) has shown a declining trend during the first half of 2009, but in July 2009, the index remains 13 percentage points above the value recorded a year earlier. Similarly, cereal prices throughout Nigeria have fallen during the first half of the year. However,

Crop calendar Nigeria



Cereal production and imports Nigeria

Cereal production	2004-2008	2008	2009	change
	average		forecast	2009/2008
	000 tonnes		percent	
Sorghum	9200	9318	9318	0%
Millet	7745	9064	9064	0%
Maize	6572	7525	7525	0%
Other	2208	2630	2703	2.8%
Total Cereals	25849	28537	28610	0.3%



Source: FAO/GIEWS Country Cereal Balance Sheets

the price of maize in Kano, rose by 17 percent between June and July, but remains 22 percent below prices observed a year earlier. Prices in the northern states are particularly high, affecting food access. The devaluation of the naira, as well as the re-introduction of import tariffs on rice, could lead to higher food import bills. However, the lower international food prices are likely to offset the inflationary effects of a weaker currency.

Overall food security situation is satisfactory but could deteriorate

Food security conditions could deteriorate in the far north if rainfall levels don't improve for the remainder of the main cropping season. The persistent above average cereal prices – that are forecast to decline when market supplies improve following the main harvest in September – will lower households' purchasing power and aggravate food security conditions among poorer market dependent households.