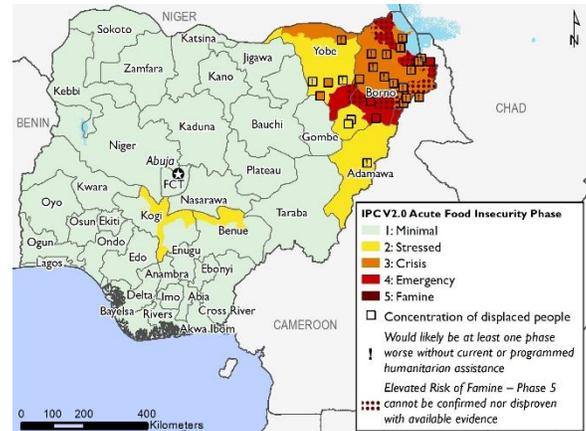


*Main season harvests came in well-below average in conflict-affected areas of northeast*

**KEY MESSAGES**

- Households worst-affected by conflict at the periphery of the Sambisa axis in the northeast have been unable to engage in normal livelihood activities for several consecutive seasons, and are facing large food consumption gaps and high levels of acute malnutrition. These households are facing Emergency (IPC Phase 4) acute food insecurity.
- There is very limited information about current outcomes in areas of the northeast that are inaccessible to humanitarian actors. Analysis of factors contributing to poor outcomes in adjacent areas of the northeast suggests that there remains an elevated risk that Famine (IPC Phase 5) outcomes could be occurring in the inaccessible areas.
- In northern Yobe State and in central and northern Borno State, some conflict-affected populations are mainly dependent on humanitarian assistance and are facing Crisis (IPC Phase 3!), while others have access to both income-earning opportunities and functioning markets and remain in Crisis (IPC Phase 3). Populations less affected by the conflict across the three states are Stressed (IPC Phase 2).
- Outside of the northeast, most poor households are engaged in typical livelihood activities and are consuming own produced food, and will remain in Minimal (IPC Phase 1) through May 2018. Exceptions include households affected by flooding, communal conflict, and localized dry spells. Affected households will resort to market purchases for food access earlier than usual, and will be Stressed (IPC Phase 2) from February through at least May 2018.
- Household food stocks and market supplies continue to increase as the main season harvest concludes across the country. Most poor households are depending on their own production, leading to a seasonal decline in food prices in markets. Prices for most staple foods are currently lower than last year, but remain above average, particularly in conflict-affected areas of the northeast.

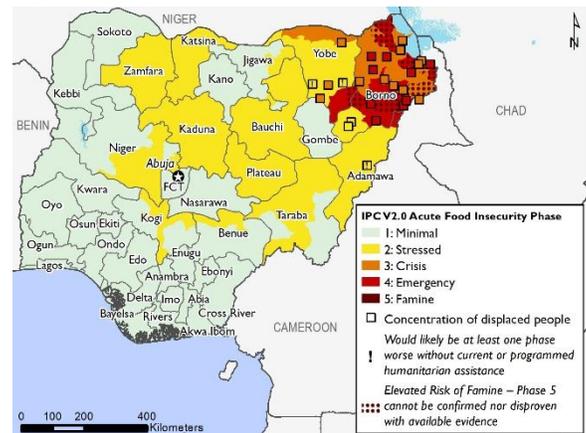
**Figure 1.** Estimated food security outcomes, December 2017 – January 2018



Source: FEWS NET

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

**Figure 2.** Projected food security outcomes, February to May 2018



Source: FEWS NET

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

## CURRENT SITUATION

The main season staple harvests have concluded in most areas, with average to above-average results in aggregate. However, there were areas with below-average or very limited production, primarily due to conflict, dry spells, flooding, and pest infestations. In areas outside of the northeast, sorghum harvests will conclude as usual in January 2018. Water and pasture availability are favorable in most areas. The resource-based conflict between farmers and pastoralists in the central states and the insurgency in the northeastern states, as well as cattle-rustling activities in the northwest of the country continue to restrict access to pastoral resources.

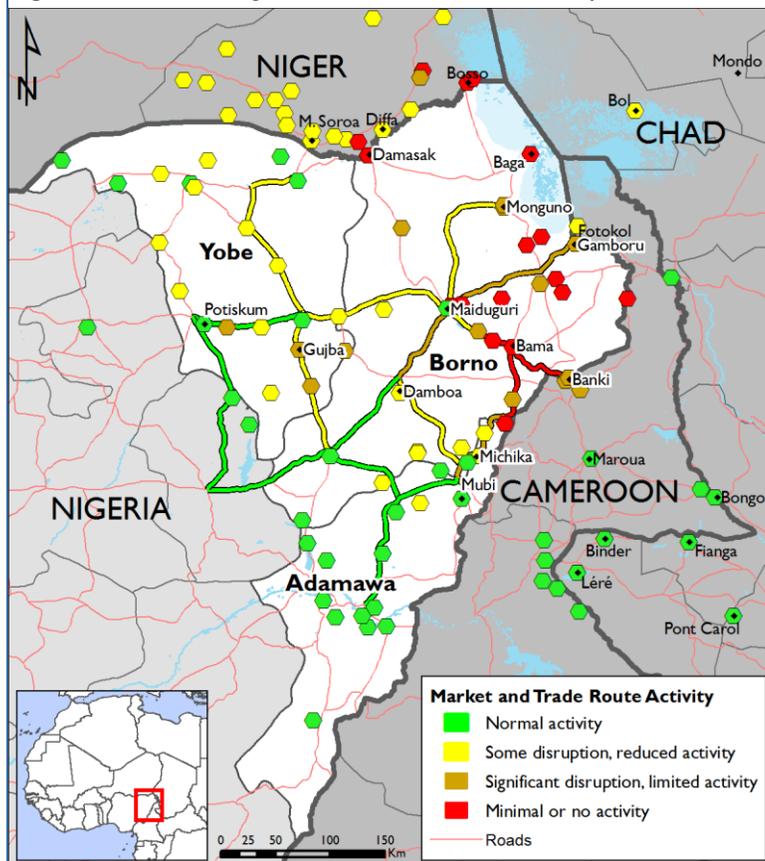
Many households in conflict-affected areas of the northeast experienced particularly poor production, while others were unable to cultivate. In these areas, the combined impact of conflict-related restrictions to land access due to fear of attacks and military enforced restrictions, prolonged dry spells, and early cessation of the rainy season in September resulted in significantly below-average harvests for most staples, particularly maize, cowpea, groundnut, millet, and sorghum, depending on the area. Most sorghum crops in the region suffered wilting during the season, further limiting harvests. Most households who were able to engage in cultivation of staples have limited own-produced stocks and will resort to market purchases and/or reliance on humanitarian assistance much earlier than is typical.

The exchange rate between the Nigerian naira (NGN) and important trading currencies such as the US dollar (USD) and the CFA franc (XOF) has remained stable since early August 2017, after periods of substantial devaluation in late 2014/early 2015 and in mid-2016. Major macroeconomic indicators also continue to improve, as government revenue from crude oil continues to increase. The price for Brent crude oil reached a 31-month high of USD 66.78/barrel as of December 26<sup>th</sup>. Nigeria has remained exempted from the OPEC quota allocation since January 2017, allowing it to increase production as crude oil prices have increased. Militant activities in the Niger Delta have declined, providing opportunities for increased exports of crude oil. Although the inflation rate has declined for nine consecutive months, it remains greater than 10 percent, primarily driven by elevated staple food prices.

Market supplies and household food stocks continue to increase due to supply from the main season harvest. Consequently, most households are consuming own-produced staples, leading to reduced market demand and a seasonal decline in food prices. Prices of major commodities including staple cereals, tubers, and legumes are lower than their respective 2016 levels, but remain higher than both the two and five-year averages. Prices are generally higher in conflict-affected areas of the northeast. In surplus-producing areas, maize prices declined by between 5 and 24 percent in November 2017 compared with October, and are lower than prices of a year prior in most markets, by between 6 and 48 percent. However, prices are substantially higher than the two and five-year average levels across all markets. This situation will persist through the New Year due to the persisting scarcity and unofficial hike in pump price of leaded fuel, leading to increased transportation costs across the country. Current prices for leaded fuel are NGN 250-300/liter, compared to a previous cost of NGN 145/liter.

The Boko Haram conflict in the Lake Chad region, particularly in Adamawa, Borno and Yobe States, has continued to severely restrict normal livelihoods activities for several consecutive years. The intensity of conflict across the three northeastern states remains similar to last year, but lower than the severity experienced in 2015. The total number of direct fatalities from conflict

**Figure 3.** Lake Chad region market and trade route activity, November 2017



Source: FEWS NET

incidents declined by about 33 percent in 2016 and 2017 as compared to 2015. However, in the areas of Borno State that remain the epicenter of the conflict, the intensity and frequency of conflict events has remained similar throughout the period from 2015 to present.

Information from the IOM Displacement Tracking Matrix (DTM) in November indicates further population movements, particularly from areas around the Sambisa axis into Bama, Gwoza, Askira Uba, Michika and Madagali LGAs, among others. Additionally, some Nigerian refugees have returned to the northeast from adjacent areas of Cameroon. Population movements will likely persist as the military intensifies and sustains operations in the mainly inaccessible areas of Borno State. Boko Haram attacks on “soft targets” (such as mosques and churches, government buildings, military checkpoints, etc.) will likely intensify during the holiday season surrounding Christmas and New Year celebrations. Attacks along trade corridors also persist, restricting the flow of food and other commodities to the northeast. However, livestock markets in Mubi, Adamawa State and Maiduguri, Borno State are now functional, and livestock flows to the southern part of the country are underway as the demand increases seasonally for end-of-year festivities. Livestock trade with Cameroon through Mubi (Adamawa State) has improved significantly as compared to previous months, with trade now exceeding the pre-conflict level.

Humanitarian actors have continued to scale up assistance across the three northeastern states of Adamawa, Borno, and Yobe, with the vast majority of assistance provided in Borno State. In October 2017, humanitarian agencies reached more than 2,400,000 conflict-affected people in the northeast with food assistance, an increase of 168,000 people from the previous month. Similarly, over 110,000 households in 33 LGAs across the three states were supported with cash-based transfers in September 2017, increasing income and food access. In addition, FAO and other humanitarian actors are providing assistance towards the upcoming dry season activities in the northeast, reaching up to 112,170 people with inputs and tools such as seeds, fertilizer, water pumps, and extension services in collaboration with the respective ADPs in Adamawa, Borno and Yobe.

## UPDATED ASSUMPTIONS

The assumptions used to develop FEWS NET’s most likely scenario for the [October 2017 - May 2018 Food Security Outlook](#) remain unchanged.

## PROJECTED OUTLOOK THROUGH MAY 2018

Most households are consuming own-produced foods as harvests conclude across the country. This, coupled with normal income-earning opportunities, sales of cash-crops and livestock, and typical access to market purchases, will facilitate Minimal (IPC Phase 1) acute food security outcomes for the majority of poor households through at least May 2018. The off-season activities, including fishing and irrigated agriculture, will provide additional income-earning opportunities for poor households, and dry-season harvests in April/May will further increase food access. However, households affected by communal conflict, flooding, pest infestations, and/or prolonged dry spells in Jigawa, Katsina, Niger, Bauchi, Benue, Taraba, Kogi, Plateau, Zamfara, and Kaduna States have experienced below-average main season harvests, and will only meet basic food needs by forgoing some basic non-food essential spending. These households are expected to face **Stressed (IPC Phase 2) acute food insecurity between February and at least May 2018.**

Markets in most parts of Borno, northern Adamawa, and southern Yobe States remain disrupted, with restricted food flow due to sporadic attacks by the insurgents and sustained military operations in the area. Many households who had poor or no main season harvests are expected to continue to face large food consumption gaps with elevated levels of acute malnutrition, and **will remain in Emergency (IPC Phase 4) acute food insecurity through at least May 2018. There continues to be little evidence on the situation in neighboring areas inaccessible to humanitarian partners, though it is expected these areas are facing similar or worse conditions as neighboring, accessible areas, and face an elevated risk of Famine (IPC Phase 5).** Most households in the southernmost parts of Borno and Adamawa States, as well as west and central Yobe State, who are less affected by the conflict and were able to engage in crop cultivation activities, are **likely to face Stressed (IPC Phase 2) acute food insecurity outcomes through at least May 2018.**

### ABOUT THIS UPDATE

This report covers current conditions as well as changes to the projected outlook for food insecurity in this country. It updates the FEWS NET’s Food Security Outlook, which is published three times per year. Learn more about our work [here](#).