The Price of Survival

Nigeria's Cost of a Healthy Diet Tracker, Q1 2026

The Price of Survival

A quarterly analysis of food affordability across Nigeria's states and zones

About BudgIT

BudgIT is a civic organisation that uses creative technology to simplify public information, stimulate a community of active citizens, and enable their right to demand accountability, institutional reforms, efficient service delivery, and an equitable society.

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Table of Content

Abbreviations

Abbreviation	Full Meaning
CoHD	Cost of a Healthy Diet
FCT	Federal Capital Territory
GAIN	Global Alliance for Improved Nutrition
HDB	Healthy Diet Basket
IPC	Integrated Food Security Phase Classification
NBS	National Bureau of Statistics
NGN / N	Nigerian Naira
FEWS NET	Famine Early Warning Systems Network
FAO	Food and Agriculture Organisation of the United Nations
Q1	First Quarter (January to March)
Q4	Fourth Quarter (October to December)

Methodology Note

All figures are drawn from NBS Cost of a Healthy Diet (CoHD) data for Q4 2025 (October to December) and Q1 2026 (January to March), covering 36 states and the FCT. Q1 2026 figures are reported alongside urban and rural breakdowns by state; Q4 2025 figures are reported at the state and zonal level only, without an urban/rural split. Percentage changes are calculated using each respective period's reported figures. Monthly minimum wage equivalents are estimated by multiplying the reported daily CoHD figure by 30 and are intended as an approximation rather than an exact monthly cost.

How CoHD Is Computed

To calculate CoHD, NBS collects food prices monthly from 10,534 sources across urban and rural markets in all states and the FCT. For each of the six food groups in the Healthy Diet Basket, NBS identifies the cheapest locally available option that meets the nutritional requirement for that group. Those six cheapest options (Starchy staples, Oils and Fats, Fruits, Vegetables, Legumes, Nuts and Seeds, and Animal-source foods) are then added together to produce the daily CoHD figure. The Healthy Diet Basket itself is built on global nutrition guidelines[1], the agreed minimum amounts of energy, protein, and essential nutrients a healthy adult needs each day, translated into food groups and quantities that can actually be bought and priced in Nigerian markets.

Table 1. Description of the Healthy Diet Basket (HDB)

Food Group	Energy (kcal)	Share of Calories	Example
Starchy Staples	1,160	50%	322g dry rice
Oils and Fats	300	13%	34g oil
Fruits	160	7%	230-300g
Vegetables	110	5%	270-400g
Legumes, Nuts and Seeds	300	13%	85g dry beans
Animal Source Foods	300	13%	210g egg

Source: NBS & GAIN, Healthy Diet Basket methodology

1 National Bureau of Statistics (2026). Cost of a Healthy Diet https://microdata.nigerianstat.gov.ng/index.php/catalog/146

Key Insights

National CoHD rose 5.8% between January and March 2026, from N1,458 to N1,541 per person per day, but the increase decelerated each month of the quarter.

5.8%

Seen against the prior quarter, the picture reverses sharply: national CoHD fell 6.4% across Q4 2025 (October-December), then rose 11.7% from December 2025 to March 2026, a swing of close to 18 percentage points in two quarters.

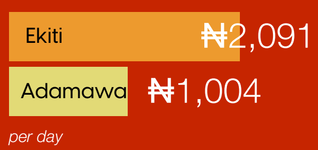
11.7%

6.4%

Taraba recorded the largest Q1 increase in the country (49.3%), while Adamawa recorded the sharpest decline (-26.7%).

49.3%

Ekiti remained the most expensive state to eat healthily in March 2026 (N2,091/day); Adamawa was the cheapest (N1,004/day).



In eight states, mostly in the North Central and North West, rural food costs now exceed urban food costs, reversing the pattern typically assumed in affordability reporting.

8
States

At the current N70,000 minimum wage, no state's monthly food cost exceeds it as of March 2026. But in Ekiti, the most expensive state, only about N7,261 is left over after food for every other household need.

₦7,261
left over after food in Ekiti state.

Executive Summary

Think of the Cost of a Healthy Diet (CoHD) as a price tag on survival. Published monthly by the National Bureau of Statistics (NBS) in collaboration with the Global Alliance for Improved Nutrition (GAIN), it measures the cheapest possible combination of locally available foods that would let one adult eat properly for a single day, nothing fancy, just enough to meet basic nutrition guidelines. It is a floor, not a comfortable budget: the figure excludes transport to the market, cooking fuel, and meal preparation[2]. If anything, real life costs more than CoHD says.

Why should a fiscal transparency unit like BudgIT care about food prices? Because CoHD asks a sharper question than the inflation figures most people are used to. Food inflation tells you prices are moving. CoHD tells you whether an adult earning a typical day's income can actually afford to eat well today in their own state. Tracked quarter after quarter and broken down by state, zone, and rural or urban location, it becomes a live readout of how Nigeria's biggest policy decisions, subsidy removal, exchange rate reform, and minimum wage negotiations are actually landing on ordinary households. That is the lens this report uses.

The report shows that food got more expensive again in the first quarter of 2026, but not in the way the headline number alone suggests. The national average climbed from N1,458 a day in January to N1,541 by March, a 5.8% rise that, on its own, reads as a steady, manageable increase. Zoom out one quarter, though, and the story flips. Food costs had actually fallen 6.4% across Q4 2025. So the Q1 2026 increase isn't really a continuation of anything; it's a sharp bounce-back off a December low. Measured end-to-end, from December to March, the national average jumped 11.7% in just three months, a faster and more dramatic move than the quarterly figure on its own suggests.

This report opens a new quarterly series tracking NBS's CoHD data. Instead of treating each NBS release as an isolated snapshot, the goal is to follow the indicator over time and tie it directly to the questions BudgIT's New Economy and Intelligence unit was built to ask: not just whether food is becoming less affordable, but where, how fast, and what that means for wage policy and government spending.

Beneath the national number sits a far messier, more revealing picture. Six states drove most of the Q1 increase on their own, while eight states actually got cheaper over the same three months. The long-running North-South affordability gap is still there, but it's narrowing from an unexpected direction: the North West posted the fastest cost increase of any zone this quarter, even though it remains cheaper overall than the South. And the old assumption that rural food is always cheaper than urban food breaks down completely in eight states, mostly across the North Central and North West. Meanwhile, the N70,000 minimum wage now technically covers a month's worth of food nationally, but in the country's most expensive states, the leftover after food is so thin it raises a harder question: what does "covering" food really mean if there's almost nothing left for anything else

[2] National Bureau of Statistics (2026). Cost of a Healthy Diet https://microdata.nigerianstat.gov.ng/index.php/catalog/146

THE NATIONAL PICTURE

01

The National Picture

Eating well costs more in Q1 2026, and the pressure is not letting up

The national average cost of a healthy diet increased from N1,458 in January to N1,513 in February to N1,541 in March 2026, an overall quarterly increase of 5.8%. Broken into monthly movements, the increase from January to February was 3.8%, while the increase from February to March slowed to 1.9%, roughly half the prior month's pace.

Month	National CoHD (N/person/day)	Change from prior month
January 2026	N1,458	—
February 2026	N1,513	3.8%
March 2026	N1,541	1.9%

This deceleration is worth tracking closely into Q2. NBS data through much of 2023 showed CoHD increasing at a larger percentage each month, accelerating rather than slowing as the period progressed. A slowdown across two consecutive months in Q1 2026 could represent a genuine break from that pattern, but two months is not yet enough to call it a trend. If the deceleration continues into April and May, it would be a meaningful signal worth reporting on its own. If the pace instead re-accelerates, that reversal would suggest whatever moderated costs in February and March, whether post-holiday demand cooling, harvest effects, or short-term exchange rate stability, was temporary rather than structural.

It is also worth being explicit about what a national average does and does not show. A 5.8% national increase sitting on top of a slowing monthly pace can still describe a country where some states are in acute distress, people are finding it hard to feed, and others are recovering, because the arithmetic of an average smooths out exactly the kind of divergence the state-level data shows once examined individually.

WHAT IS MAKING A HEALTHY DIET MORE EXPENSIVE?

02

What Is Making a Healthy Diet More Expensive?

A breakdown of CoHD cost by food group, Q1 2026 National Average

Table: CoHD Daily Cost per Food Group, National Average (Naira/day)

Food Group	Jan Daily Cost	Feb Daily Cost	March Daily Cost	Q1 2026 Change
Animal Source Foods	N528	N596	N606	14.67%
Legumes, Nuts and Seeds	N95	N102	N105	10.51%
Starchy Staples	N243	N249	N260	6.91%
Fruits	N240	N245	N248	3.06%
Oils and Fats	N118	N114	N115	-2.34%
Vegetables	N233	N206	N208	-10.73%
Total	N1,458	N1,513	N1,541	5.75%

Source: National Bureau of Statistics, Cost of a Healthy Diet (CoHD) series, Q1 2026

The Crayfish, the Egg, the Milk: Protein is becoming a luxury

When we say animal-source foods, we mean the everyday proteins that Nigerians rely on to eat well: crayfish, eggs, fresh milk, dried shrimp, and local cheese (wara). These are not luxury items. They are what goes into the soup, the stew, the breakfast plate. According to NBS's food basket data, the animal-source foods included in the CoHD calculation are items such as crayfish (small, dried), a crate of agric hen eggs, fresh milk/nono, shrimps (white, dried), and local cheese. For millions of Nigerian households, these are the protein of everyday life.

In Q1 2026, this food group rose 14.67% in just three months, from N528 a day in January to N606 by March. That is the largest increase of any food group in the basket and more than double the overall 5.75% national CoHD increase. At N606 a day, animal source foods now account for nearly 40% of the total daily cost of a healthy diet, even though they represent only 13% of its calorie content. In other words, protein is not feeding Nigerians much, but it is costing them a great deal.

Animal source foods cost nearly 40% of a healthy diet's daily price tag, while contributing only 13% of its calories. That gap between cost and nutrition is what a protein affordability crisis looks like.

Vegetables got cheaper, but Nigerians are not eating better

Vegetables fell 10.73% across the quarter, from N233 in January to N208 in March. Items like tomatoes (dried), okra (dried), oha leaves, carrots, green leaf/tete, and onions are what NBS counts in this group. On the surface, a 10.73% decline sounds like relief. But the way household food decisions actually work, cheaper vegetables rarely replace protein. They replace nothing. When eggs and crayfish become too expensive, families do not eat more okra instead. They simply eat less protein, and the nutritional quality of the household diet quietly declines.

Oils and fats also fell slightly, by 2.34%, driven by items such as palm oil and vegetable oil. These two declines together provided some offset to the protein surge, but not enough. The net result was still a 5.75% national increase.

When all you can afford is garri

Starchy staples, covering items like garri (white and yellow), maize grains, and millet, rose 6.91% across Q1 2026, from N243 to N260 a day. These foods provide half of the calories in a healthy diet basket but account for only about 17% of its total daily cost. This means that if a household is forced to cut spending on food, starchy staples are the first to go, not because they are healthy, but because they are the cheapest way to feel full. When protein prices rise and budgets tighten, the typical Nigerian household does not immediately go hungry. They shift toward more garri, more maize, less fish, less eggs. The calories remain. The nutrition does not.

A rising cost of animal protein does not just mean food is more expensive. It means the affordable option is also the less nutritious one.

What this means for everyday Nigerians

Consider a household in Ekiti, the most expensive state in the country, where the daily CoHD reached N2,091 in March 2026. For a minimum wage earner taking home N70,000 a month, that is N62,700 a month just to eat adequately. But the food they would need to eat to meet that standard includes eggs, crayfish, or milk every single day. In a country where a crate of agric hen eggs has become a prized household expenditure, and where crayfish is increasingly sold in tiny sachet quantities because people cannot afford more, the idea that a healthy diet is accessible at the current minimum wage does not match what is happening in markets across the country.

The data is pointing to a specific and urgent problem: it is not food in general that is becoming unaffordable. It is the protein that makes food nutritious. Garri and maize remain relatively cheap. What is increasingly out of reach is the crayfish that goes in the soup, the eggs that go on the plate, and the milk that goes in the child's cup. That is the real story behind the 5.75% national CoHD increase in Q1 2026.

Q4 2025 VERSUS Q1 2026: THE HARVEST GAVE, THE DRY SEASON TOOK IT BACK

03

Q4 2025 Versus Q1 2026: The Harvest Gave, The Dry Season Took It Back

Before examining the state-level detail for Q1 2026, it is useful to place the quarter in context relative to the previous quarter. NBS's Q4 2025 data (October to December) showed national CoHD falling steadily, from N1,474 in October to N1,380 in December, a decline of 6.4%. That fall was driven primarily by starchy staples, garri, maize, and millet, dropping 14.3% as Nigeria's main harvest season peaked and grain supplies flooded local markets. It was seasonal relief, not a structural improvement. Q1 2026 reversed it entirely. As the dry season set in and post-harvest supply tightened, prices climbed back across all food groups, with animal-source foods leading the surge, as detailed in the preceding section. From December 2025 to March 2026, the national average rose 11.7%, from N1,380 to N1,541.

Period	National CoHD (N/person/day)	Quarterly change
October 2025	N1,474	—
November 2025	N1,429	—
December 2025	N1,380	-6.4% (Q4 2025 trend)
January 2026	N1,458	—
February 2026	N1,513	—
March 2026	N1,541	5.8% (Q1 2026 trend)

> **Between December 2025 and March 2026, the national cost of a healthy diet rose 11.7% in just three months, a jump that the Q4 or Q1 figures alone do not fully capture.**

3.1 Households in Yobe and Oyo felt relief in Q4 2025. By March, it was gone

The clearest illustration of this reversal sits at the state level. Yobe recorded an 18.6% decline through Q4 2025, then rose 42.5% from December to March. Oyo shows a near-identical pattern, falling 19.5% in Q4 before recovering 40.2% between December and March.

State	Q4 2025 trend (Oct-Dec)	Dec 2025	Mar 2026	Dec-to-Mar change
Yobe	-18.6%	N1,001	N1,426	42.5%
Oyo	-19.5%	N1,105	N1,549	40.2%
Gombe	-13.5%	N950	N1,305	37.4%
Kano	-4.6%	N1,146	N1,492	30.2%
Zamfara	-3.2%	N1,177	N1,490	26.6%
Osun	-9.2%	N1,433	N1,809	26.2%
Katsina	-6.9%	N1,111	N1,401	26.2%
Sokoto	-4.6%	N1,244	N1,562	25.5%

Both Yobe and Oyo effectively erased their entire Q4 2025 decline within a single quarter and moved well past where they started. Swings of this size, more than 40 percentage points across five months, point to real volatility in local food markets, likely driven by supply disruptions, seasonal shifts, or transport pressures specific to those states. This is exactly the kind of pattern a one-off report would miss entirely, and one that a quarterly tracker is built to catch and follow over time.

3.2 At the zonal level, the north-west and south-west drove the reversal

Zone	December 2025	March 2026	Dec-to-Mar change
North West	N1,190	N1,458	22.5%
South West	N1,497	N1,801	20.4%
North East	N1,066	N1,233	15.7%
South East	N1,780	N1,899	6.7%
North Central	N1,289	N1,357	5.3%
South South	N1,570	N1,604	2.2%

North West and South West drove the national cost reversal between December 2025 and March 2026, posting the two largest increases of any zone at 22.5% and 20.4% respectively. What makes the North West figure particularly notable is that it started from a low December base of N1,190, the second cheapest zone at the end of 2025, yet outpaced every other zone by March. For households in the North West, this rise is especially concerning because the zone was already one of the most food-insecure parts of the country. A 22.5% increase in the minimum cost of eating well in just three months means that healthy food, already a stretch for many households, moved further out of reach during a period when incomes did not change. In practical terms, people do not stop eating when food gets expensive; they eat cheaper, less nutritious food instead. A rising CoHD in a zone like the North West is therefore not just a price story but a nutrition and food security story.

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South-South barely shifted, rising just N34 over the same period, making it the most stable zone in this comparison. That relative stability suggests healthier food remained more consistently accessible to households there, though affordability challenges tied to income levels remain a separate concern.

STATES DRIVING THE Q1 2026 INCREASE, AND STATES BUCKING THE TREND

States Driving the Q1 2026 Increase, and States Bucking the Trend

4.1 Six states where the cost of eating well spiralled out of reach

Ranked by percentage change from January to March, the largest increases were recorded in Taraba, Gombe, Yobe, Cross River, Kano, and Ogun.

State	January	February	March	Q1 change
Taraba	N769	N1,102	N1,149	49.3%
Gombe	N973	N1,251	N1,305	34.1%
Yobe	N1,098	N1,346	N1,426	29.9%
Cross River	N1,301	N1,666	N1,667	28.1%
Kano	N1,175	N1,451	N1,492	27.0%
Ogun	N1,351	N1,698	N1,712	26.7%
Jigawa	N1,107	N1,326	N1,367	23.4%
Kaduna	N1,209	N1,415	N1,447	19.8%
Zamfara	N1,267	N1,436	N1,490	17.6%
Plateau	N1,175	N1,361	N1,367	16.4%

What stands out is the geographic spread. Taraba, Gombe, and Yobe sit in the North East. Kano, Jigawa, and Zamfara sit in the North West. Cross River is South-South, and Ogun is South-West. A purely regional explanation, a story about northern insecurity or southern logistics costs alone, does not hold up against this spread. The more plausible explanation is a mix of localised factors: state-specific market disruptions, transport route issues, planting-season effects on local supply, or, in some cases a low January starting point that makes the percentage increase look larger than the underlying naira movement actually was.

Taraba is the clearest example of this last dynamic. Its January figure of N769/day was the lowest starting point of any state, well below the national average. By March, it had risen to N1,149/day, still below the national average of N1,541, but the percentage increase looks dramatic precisely because it started from such a low base. This distinction between percentage change and absolute cost matters for every quarter of this tracker going forward: reporting only one risks misleading readers about where the genuine affordability crisis actually sits.

4.2 Eight states where households got a break, but questions remain

Against the states driving the national increase, eight states saw CoHD fall over the same period.

State	January	February	March	Q1 change
Adamawa	N1,369	N979	N1,004	-26.7%
Akwa Ibom	N1,675	N1,184	N1,313	-21.6%
Ondo	N1,996	N1,722	N1,736	-13.0%
Edo	N1,820	N1,634	N1,589	-12.7%
Borno	N1,356	N1,040	N1,244	-8.3%
FCT	N1,188	N1,102	N1,113	-6.3%
Rivers	N1,658	N1,625	N1,601	-3.5%
Bayelsa	N1,882	N1,850	N1,877	-0.3%

Adamawa's decline is the most pronounced according to our analysis. Its January figure of N1,882/day was comparable to several southern states, but by March it had fallen to N1,877/day, the lowest figure recorded anywhere in the country. Akwa Ibom shows a similar pattern, falling from N1,658/day in January to N1,601/day in March.

What explains a fall this sharp in only two months cannot be answered from this dataset alone. It may reflect a genuine improvement in local food supply or a seasonal effect tied to harvest timing in that part of the country. A single anomalous month can distort a quarterly trend line in either direction, which is one more reason a recurring quarterly tracker, rather than a one-off snapshot, is the right format for this kind of analysis: it allows BudgIT to see whether a movement like Adamawa's holds up, corrects, or reverses in Q2.

THE NORTH–SOUTH DIVIDE: PERSISTENT, BUT SHIFTING

05

The North-South Divide: Persistent, But Shifting

5.1 Where you live still determines what you can afford to eat

At the zonal level, the geographic divide in food affordability, first documented in earlier CoHD reporting, persists in Q1 2026.

Zone	January	February	March	Q1 change
North East	1,138	1,160	1,233	8.4%
North Central	1,296	1,343	1,357	4.7%
North West	1,240	1,417	1,458	17.5%
South South	1,647	1,589	1,604	-2.6%
South West	1,744	1,786	1,801	3.3%
South East	1,799	1,889	1,899	5.5%

This divide is also visible at the state level. Among the ten cheapest states in March, eight sit in the North. Among the ten most expensive states, every single one sits in the South.

10 (TEN) CHEAPEST STATES

MARCH 2026

10 (TEN) EXPENSIVE STATES

MARCH 2026

5.2 The north-west is losing its affordability edge, fast

What differs in Q1 2026 is the direction of movement. North West recorded a 17.5% increase across the quarter, more than double the next-fastest zone, and well above the national average of 5.8%. South-South was the only zone to see average costs fall (-2.6%).

This means the absolute gap between North and South, while still wide, may be narrowing on the northern side rather than narrowing on the southern side because southern costs are falling. That distinction matters for how the finding should be read. A narrowing gap, driven by improving affordability in the south, would be a genuinely positive development.

A narrowing gap driven by northern costs rising faster is, if anything, a worsening of conditions for households in a region that was already more vulnerable on other welfare indicators.

URBAN AND RURAL COSTS DON'T MOVE THE WAY YOU'D EXPECT

06

Urban and Rural Costs Don't Move the Way You'd Expect

6.1 In eight states, living in the village no longer means cheaper food

The conventional assumption in food affordability reporting, and the pattern documented in earlier CoHD analysis, is that rural areas are reliably cheaper than urban ones, since food is typically grown and traded closer to where it is produced. That assumption holds in several states this quarter.

States Where Urban Costs Exceed Rural Costs (March 2026)

State	Urban (N/day)	Rural (N/day)	Urban premium
Ekiti	2,288	1,895	392
Ogun	1,860	1,564	296
Sokoto	1,692	1,431	261
Osun	1,938	1,680	257
Borno	1,361	1,127	234
Ondo	1,829	1,643	187
Lagos	1,998	1,822	176
Anambra	1,850	1,678	172

But the pattern reverses entirely in eight states, all sitting in the North Central or North West.

States Where Rural Costs Exceed Urban Costs (March 2026)

State	Urban (N/day)	Rural (N/day)	Urban premium
Benue	1,316	1,565	249
Plateau	1,289	1,446	157
Niger	1,222	1,358	136
Jigawa	1,303	1,431	128
FCT	1,061	1,164	103
Yobe	1,381	1,471	90
Zamfara	1,459	1,520	61
Kebbi	1,429	1,465	36

Every state where rural food now costs more than urban food is located in the North Central or North West. This is not a nationwide pattern, it is a regional one, and it points to something specific happening to food supply and markets in that part of the country.

One likely explanation is that cities in these states, places like Abuja, Jos, and Minna, are major supply and distribution hubs where markets are better stocked, and competition keeps prices lower. Rural areas around them, on the other hand, often pay more to get food in. FEWS NET's January 2026 outlook specifically documented how worsening conflict across the North West and North Central was disrupting agricultural activities, forcing farmers off their land and pushing households to depend more heavily on markets for food[3]. A separate February 2026 FEWS NET report noted that escalating attacks during the September to December 2025 harvest period significantly reduced main-season production across northern Nigeria[4]. When local farming collapses and households must buy rather than grow food, rural markets, with fewer options and higher transport costs, bear the brunt of that pressure.

[3] FEWS NET (2026). Food Assistance Outlook Brief, January 2026. Famine Early Warning Systems Network. https://fews.net/global/food-assistance-outlook-brief/january-2026/print

[4] FEWS NET (2026). Food Assistance Outlook Brief, February 2026. Famine Early Warning Systems Network. https://fews.net/global/food-assistance-outlook-brief/february-2026/print

MINIMUM WAGE AND THE REAL AFFORDABILITY MARGIN

07

Minimum Wage and the Real Affordability Margin

7.1 Minimum wage now technically covers food costs nationally

At the current N70,000 monthly minimum wage, no state's monthly cost of a healthy diet (the daily CoHD figure multiplied by 30) exceeds the minimum wage as of March 2026. But that comparison only tells half the story. In Ekiti, the most expensive state, eating adequately for a month alone costs approximately N62,700, leaving a minimum wage earner with just N7,300 for everything else. Rent, transport to work, electricity, school fees, healthcare, and any unexpected expenses all have to come out of that N7,300. And this is before factoring in that CoHD itself is a floor figure; it excludes the cost of getting to the market, cooking fuel, and meal preparation. In reality, the true cost of eating well is higher than what CoHD reports. So when a minimum-wage earner in Ekiti spends nearly 90% of their monthly income just to meet the bare minimum nutritional standard, the question is no longer whether the wage covers food. It is a question of whether a meaningful standard of living is possible on what remains.

State	March 2026 daily CoHD	Estimated monthly cost (×30)	Share of N70,000 minimum wage
Ekiti	2,091	62,739	89.6%
Imo	2,052	61,547	87.9%
Abia	1,970	59,106	84.4%
Lagos	1,910	57,306	81.9%
Ebonyi	1,891	56,729	81.0%
Bayelsa	1,877	56,313	80.4%

> **In Ekiti, the minimum wage technically covers the cost of food. What it leaves over for everything else a household needs is roughly N7,261 a month.**

This reframes the right question for policymakers. It is not whether the minimum wage covers food; technically, nationally, it now does. It is whether a wage that leaves a worker in the country's most expensive states with roughly N7,000 to N10,000 a month for everything other than eating can reasonably be called adequate.

LOOKING AHEAD TO Q2 2026

08

Looking Ahead to Q2 2026

Three things are worth tracking specifically in next quarter's data:

- Whether the deceleration in national month-on-month cost growth (3.8% in January-February, slowing to 1.9% in February-March) continues into April and May, or whether the sharp December-to-March rebound documented in Section 2 resumes at the same pace.

- Whether the six states driving Q1's steepest increases (Taraba, Gombe, Yobe, Cross River, Kano, Ogun) continue climbing, stabilise, or begin to correct, particularly Taraba and Oyo, whose swings between Q4 and Q1 were large enough that a further reversal or continuation would both be significant.

- Whether the urban-rural reversal observed in eight North Central and North West states this quarter persists into Q2 or was specific to the Q1 period. If it persists across two consecutive quarters, it would justify a standalone field investigation into the drivers of higher rural costs in those specific states.

POLICY RECOMMENDATIONS/ CONCLUSION

Policy Recommendations/ Conclusion

9.1 Policy Recommendation

01

NBS should publish a food-basket cost breakdown alongside state and zonal averages. The current state and zonal releases show how much a healthy diet costs but not what is driving the cost. Without knowing whether a given state's increase is being pushed by animal protein, staples, vegetables, or another food category, it is difficult for policymakers to respond precisely. A targeted intervention on, say, protein affordability looks very different from one aimed at staple prices. Disaggregated food-basket data would make this tracker, and any policy response built on it, significantly more useful.

02

State governments in the states with the largest Q1 2026 cost increases, particularly Taraba, Gombe, Yobe, Cross River, Kano, and Ogun, have a responsibility to explain what is driving food costs up in their territories and what they are doing about it. A 49% increase in the cost of eating well in a single quarter, as recorded in Taraba, is not a minor fluctuation. It is a signal that something is wrong in local food markets, whether that is supply disruption, transport failure, or the downstream effects of insecurity on farming. State ministries of agriculture and food security should be required to publish quarterly reports on local market conditions, price drivers, and intervention plans. Silence from government in the face of data this stark is itself a governance failure.

03

The minimum wage debate should shift from whether it covers food to what is left after food. Policymakers and labour negotiators should treat the residual amount left over after CoHD, rather than the binary of whether wages exceed CoHD, as the more meaningful affordability metric going forward.

04

Address insecurity in the North West and North Central as a food security intervention. The data shows these zones posting the fastest cost increases, and FEWS NET has directly linked this to conflict disrupting farming and supply chains. A recommendation urging the federal government to treat insecurity in these zones as a food security emergency, not just a security problem, would be a strong advocacy push.

04

Federal and state governments should review food import waivers and supply-side interventions in high-cost states. Ekiti, Imo, Abia, and Lagos are consistently the most expensive states for healthy food. A targeted recommendation on which supply-side policies, such as import waivers for specific food categories or market infrastructure investments, could bring costs down in these states would be useful.

9.2 Conclusion

The Q1 2026 Cost of a Healthy Diet data resists a single, clean national narrative, and that resistance is itself the most important finding in this report. Viewed in isolation, the national average suggests a moderate, decelerating increase in food costs and, for the first time in recent memory, a minimum wage that technically covers the cost of food. Viewed against Q4 2025, the same numbers indicate a sharp reversal from a December low, concentrated in specific states and zones rather than evenly spread across the country.

Underneath the national average sit six states where costs rose by a quarter or more in three months, eight states where costs fell just as sharply, a North-South divide that persists even as its narrowest point shifts unexpectedly toward the North, and an urban-rural relationship that has inverted entirely in nearly a quarter of the states reviewed. Any policy response built on the national figure alone would be responding to an average that describes almost none of the states that comprise it.

The purpose of tracking this data quarterly, rather than treating each release as a standalone snapshot, is to make state-level and quarter-on-quarter divergence visible before it gets lost in next year's annual summary. This report sets the baseline. The Q2 2026 edition of this tracker will test whether the patterns identified here- the deceleration, the six fastest-rising states, the urban-rural reversal- hold, reverse, or deepen.