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FUEL SUBSIDY REMOVAL IN NIGERIA: IMPLICATION FOR HUMAN SECURITY

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Abstract

The removal of petrol subsidy in Nigeria marked one of the most consequential economic policy shifts in the country's recent history. Even though fiscal responsibility, efficiency, and improved governance justified the reform, its sudden social impact was devastating for a population already suffering from poverty, inflation, joblessness, weak social safety nets, and security challenges. This paper examines the implications of subsidy removal for human security in Nigeria by situating the policy within broader debates on economic reform and welfare protection. Drawing on policy documents, official data, and scholarly research, the paper argues that removing the subsidy on fuel has had both positive and negative consequences. Significantly, the policy promises fiscal relief, strengthened public finances, and a reduction in the petrol supply chain. Conversely, the decision has exacerbated economic fragility by driving up transportation expenses, fueling food inflation, eroding household purchasing power, and increasing the risk of civil unrest. The paper concludes that subsidy reform in Nigeria can only become socially legitimate and developmentally effective if embedded within transparent governance, targeted welfare systems, and long-term investment in human-centered development.

Keywords: fuel subsidy removal, human security, Nigeria, inflation, social protection

1. Introduction

The debate became even more intense following the declaration in 2023 that fuel subsidy had ended, a decision that triggered an immediate surge in petrol prices, with far-reaching knock-on effects across transportation, food systems, household expenditure, and small-scale livelihoods. Official data later showed that the average retail price of petrol in January 2024 stood at N668.30, representing a 159.92% increase from the N257.12 recorded in January 2023 (National Bureau of Statistics, 2024). These developments occurred within a macroeconomic environment already burdened by inflation, currency volatility, and weak real income growth (International Monetary Fund, 2024; World Bank, n.d.).

In a narrow fiscal sense, subsidy removal may be defended as a rational policy choice. Governments and international financial institutions have long maintained that fuel subsidies distort markets, encourage smuggling, crowd out developmental expenditure, and disproportionately benefit higher-income groups that consume more fuel (International Monetary Fund, 2024; Siddig et al., 2015). Yet public policy cannot be judged solely by macroeconomic logic. In a society where millions live near or below the poverty threshold, sudden increases in energy prices affect far more than consumption patterns. They reshape access to food, healthcare, education, mobility, employment, and social stability. In that sense, subsidy removal is not merely an economic reform; it is also a human security issue.

This paper examines the implications of subsidy removal in Nigeria for human security. It argues that while subsidy reform may have long-term fiscal and structural merits, its short- to medium-term social consequences can be destabilizing when mitigation systems are weak. The discussion proceeds through conceptual clarification, theoretical framing, literature review, analysis of findings and results, and a concluding reflection on policy options for a more socially balanced reform process.

1.1 Background to Fuel Subsidy in Nigeria

Nigeria's fuel subsidy regime emerged from the contradiction of being a major crude oil producer with chronic dependence on imported refined petroleum products. Despite abundant hydrocarbon resources, domestic refining capacity remained weak for many years, forcing the country to import large quantities of refined fuel. The state then absorbed part of the landing cost so that domestic pump prices could remain artificially low. Over time, this arrangement became politically sensitive because low fuel prices came to be seen by many citizens as one of the few tangible benefits of oil wealth (International Energy Agency, 2019).

However, the subsidy system grew into a major fiscal burden and became associated with opaque accounting, fraudulent claims, arbitrage, and cross-border smuggling. Reform advocates argued that the state was spending vast sums on a mechanism that neither solved structural energy problems nor delivered equitable welfare outcomes. Public funds used to sustain petrol subsidies, they maintained, could instead be directed toward infrastructure, health, education, and targeted social investments (International Monetary Fund, 2024).

Yet the social meaning of subsidy in Nigeria has always exceeded its formal economic design. Because wages are low, electricity supply is unreliable, and transport systems are weak, cheap petrol indirectly supports nearly every sphere of daily life. Households depend on fuel not only for transportation but also for electricity generation, informal businesses, food supply chains, and domestic survival. For this reason, subsidy removal often translates into a general cost-of-living crisis rather than a discrete sectoral adjustment.

The central problem addressed in this paper is the contradiction between the economic justification for subsidy removal and its social consequences for vulnerable populations in Nigeria. Although subsidy removal may improve fiscal space and reduce distortions, it also generates inflationary shocks that immediately affect household welfare. In a country marked by multidimensional poverty, weak institutional trust, and uneven state capacity, such shocks intensify human insecurity. The policy challenge is therefore not simply whether subsidy should be removed, but how such removal affects the everyday security of citizens. When transport costs rise, food becomes more expensive, health access worsens, school attendance declines, and unemployment pressures deepen, the outcome is a broad erosion of human security. If these effects are not mitigated, subsidy reform may undermine social legitimacy and provoke unrest, thereby weakening both development and governance.

This study examines the conceptual framework and rationale behind Nigeria's fuel subsidy removal, clarifies the relevance of human security to economic reform, reviews the literature on its socioeconomic consequences, assesses its specific human security impacts, and proposes policy recommendations to align fiscal reform with citizen welfare. To guide this analysis, the paper addresses four central questions in narrative form: the underlying rationale for subsidy removal; the utility of the human security concept in explaining its social costs; the empirical evidence regarding its effects on inflation, welfare, and stability; and the strategic policy interventions required to balance fiscal sustainability with human security.

Methods

This paper adopts a qualitative documentary approach based on secondary data drawn from official publications, policy reports, economic assessments, and relevant scholarly literature on subsidy reform and human security. The analysis focuses primarily on the reform period, drawing key evidence from the National Bureau of Statistics (NBS), the World Bank, the International Monetary Fund (IMF), and peer-reviewed academic studies. The approach is interpretive and analytical rather than statistical, synthesizing these sources to explain the relationship between subsidy removal and citizen welfare in Nigeria. The documentary method is appropriate because the subject involves policy interpretation, historical context, welfare outcomes, and conceptual debate. While the paper does not claim to present original field data, it offers a structured, evidence-based synthesis suitable for academic and policy discussion.

Conceptual Clarification

3.1 Subsidy Removal

A subsidy is generally understood as financial assistance provided by the government to reduce the cost of a product or service for consumers or producers. In the Nigerian context, fuel subsidy refers to the state's payment of the difference between the actual market cost of imported or refined petrol and the official pump price charged domestically. Subsidy removal therefore means the withdrawal of this financial support so that the retail price of petrol is determined more fully by market forces (Kadiri & Lawal, 2016). In theory, subsidy removal promotes efficiency, discourages waste, reduces fiscal leakage, and allows public resources to be reallocated. In practice, however, the consequences depend on the wider structure of the economy. In a country with functional public transport, stable electricity, rising wages, and strong social insurance, the pain of subsidy removal may be manageable. In Nigeria, where these conditions are weak or absent, the effects can be far more severe.

3.2 Human Security

The concept of human security gained prominence through the Human Development Report 1994, which broadened the meaning of security beyond military threats to include economic, food, health, environmental, personal, community, and political security (United Nations Development Programme, 1994). Human security emphasizes protection from fear and want, as well as the preservation of human dignity. Economic security concerns stable income and access to livelihood. Food security relates to the physical and economic ability to obtain sufficient food (Shekoni, 2025). Health security involves protection from disease and barriers to healthcare. Personal and community security refer to protection from violence, criminality, and destabilizing social conditions. Political security includes freedom from repression and structural exclusion. When examined through this lens, subsidy removal becomes a human security issue because it shapes citizens' access to survival, welfare, and social stability.

Palliative

This refers to any temporary, short-term relief measure, program, or material intervention implemented by the government to cushion citizens against the immediate, severe economic shocks of structural policy reforms most notably fuel subsidy removal, currency devaluation or emergency crises.

Theoretical Framework

This paper is anchored in the human security framework. Unlike conventional economic approaches that prioritize macroeconomic stability, human security evaluates policy through the lived experiences of people, asking whether a reform expands or constrains human freedom, dignity, and resilience. To provide analytical clarity, this study treats economic security (purchasing power, employment, and income) and food security (accessibility and affordability) as primary dimensions, while treating personal and political security (social stability and risk of unrest) as secondary, downstream outcomes. The framework is particularly useful for analyzing subsidy removal in Nigeria for three reasons. First, it captures the multidimensional nature of these effects, showing how rising fuel prices influence food access, mobility, health, education, and social relations. Second, it highlights distributional justice, illustrating how the same policy yields starkly different outcomes for elites, middle-income households, and the poor. Third, it helps explain why technically sound reforms may fail politically when citizens experience them as existential threats. Ultimately, this framework does not deny the importance of fiscal sustainability, but insists that economic reforms be evaluated alongside their social costs, defining success as the simultaneous strengthening of state capacity and citizen welfare.

Literature Review

The literature on fuel subsidy removal in Nigeria is broad and often sharply divided. One strand emphasizes inefficiency, corruption, and fiscal waste. Another highlights poverty, distributive justice, and the social function of low fuel prices in a fragile economy. A third strand takes a more balanced approach, arguing that subsidy reform may be necessary but must be sequenced with institutional credibility and social protection (Shagali & Yusuf, 2022; Yunusa et al., 2023).

Pro-reform literature often argues that fuel subsidies are poorly targeted and regressive. Because wealthier households consume more fuel directly and indirectly, they capture a disproportionate share of the benefit (Shekoni, 2024). From this viewpoint, generalized subsidy is an expensive and blunt welfare instrument. International policy institutions have frequently advanced this position, maintaining that subsidy removal can free resources for more productive public spending (International Monetary Fund, 2024; Siddig et al., 2015).

Another body of literature focuses on the political economy of subsidy in oil-producing states. Scholars in this tradition argue that subsidy persists not only because it is economically useful, but because it serves as a symbolic social contract between the state and citizens. In resource-dependent states where public services are weak, cheap fuel becomes one of the few visible redistributive mechanisms. Removing it without replacing its social function can therefore provoke legitimacy crises (Odili & Obiora, 2023).

Studies on the Nigerian experience repeatedly show that fuel price increases have cascading effects on living standards. Because transport links together labor mobility, market exchange, and food distribution, higher fuel prices quickly transmit into broader inflation. Official evidence supports this concern (African Development Bank, 2026). The National Bureau of Statistics reported that the average retail price of petrol in January 2024 was N668.30, representing a 159.92% increase relative to January 2023 (National Bureau of Statistics, 2024). This magnitude of increase helps explain why households immediately felt the impact of reform in daily expenditure patterns.

The inflationary environment also matters. World Bank data indicate that Nigeria has faced elevated consumer price inflation in recent years, a condition that magnifies the welfare impact of energy price shocks (World Bank, n.d.). Recent empirical work likewise suggests a substantial relationship between subsidy removal and the cost of living. Abiodun and Ajuwon (2025) found that fuel subsidy removal significantly intensified inflationary pressures and worsened living costs, underscoring the need for palliative support and welfare-enhancing interventions.

Some recent analyses have argued that the reform's social costs were aggravated by inadequate compensatory mechanisms. Cash transfers, wage adjustments, and transport support were either delayed, limited, or insufficient relative to the scale of the shock. This is consistent with broader comparative literature, which shows that energy subsidy reforms are more politically sustainable when they are gradual, transparent, and accompanied by credible compensation (Siddig et al., 2015).

There is also a growing literature linking economic shocks to broader security outcomes. In fragile contexts, declining purchasing power can intensify social frustration, criminal vulnerability, and distrust of political institutions. The long history of labor resistance to subsidy reform in Nigeria reflects this tension, as organized groups have often interpreted abrupt price liberalization as a transfer of adjustment costs onto ordinary citizens (Shekoni, 2023).

A more nuanced literature, however, warns against romanticizing subsidy. It notes that maintaining artificially low fuel prices can trap countries in recurring fiscal crises and deter investments in alternative transport, refining, and energy infrastructure (Shekoni, 2024). From this perspective, the real challenge is not whether to reform, but whether the state can convert reform savings into visible developmental outcomes. In other words, subsidy removal may be economically defensible, but only if the state can build trust through delivery.

Summary of major arguments in the subsidy removal debate

Table 1

Dimension	Expected Policy Benefit	Observed Social Risk in Nigeria
Market efficiency	Less distortion in downstream petroleum pricing	Citizens may not trust that savings will be transparently used
Market Preferences	Less distortion in downstream petroleum pricing	Sharp price pass-through to transport and food costs
Social welfare	Possible long-term reallocation to targeted welfare schemes	Immediate decline in purchasing power, especially for low-income households
Energy sector reform	Incentive for private investment and domestic refining	Short-term hardship before structural gains materialise
Governance	Opportunity to reduce fraud and smuggling	Risk of protests, strikes, and legitimacy crisis if reforms lack cushioning

5.1 Empirical Context

A useful way to understand the social consequences of subsidy removal is to compare pre-removal and post-removal conditions in terms of petrol pricing and welfare transmission. While the policy objective may be macroeconomic correction, the public experiences it at the micro level through household budgets.

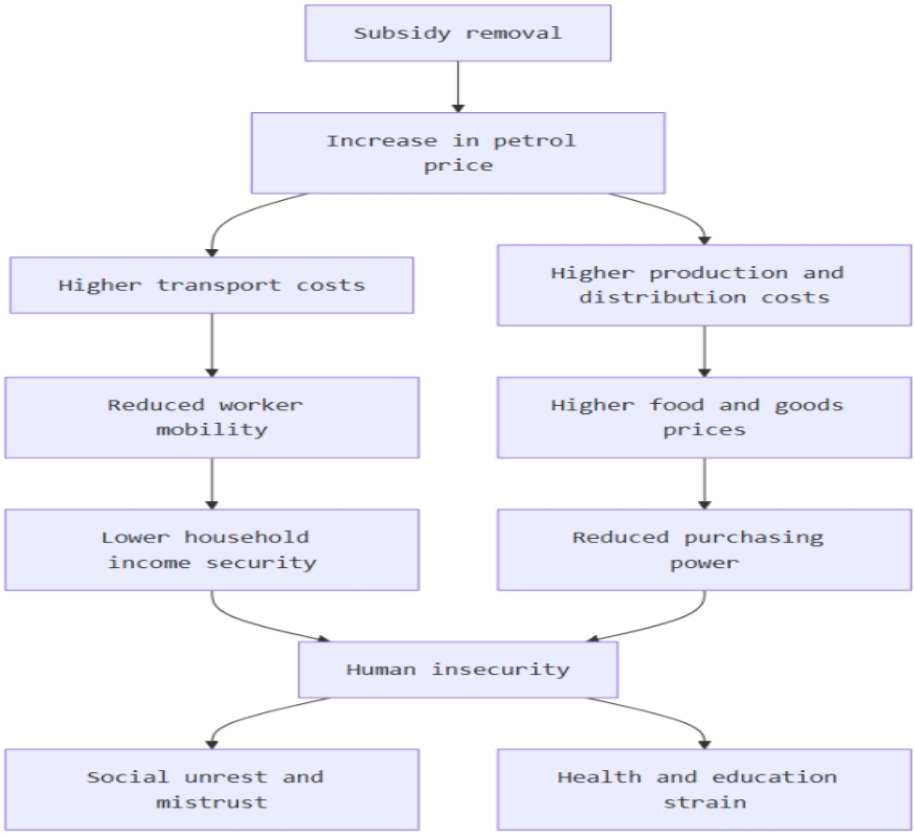
Table 2

Selected indicators relevant to the post-removal context

Indicator	Earlier Condition	Post-removal Evidence	Implication
Average retail PMS price	N257.12 in January 2023	N668.30 in January 2024	Sharp increase in household transport and energy costs
Inflation environment	Already elevated	Continued high inflationary pressure	Fuel shock compounded broader cost-of-living crisis
Poverty exposure	Large vulnerable population	Higher real income pressure on low-income households	Greater economic insecurity
Policy narrative	Longstanding skepticism of reform	Calls for palliatives and public accountability	Weak social legitimacy of abrupt reform

Figure 1

Illustrative transmission of subsidy removal effects on human security



The chart is illustrative rather than econometric. Its purpose is to show the relative intensity with which subsidy removal transmits into transport costs, food prices, household purchasing power, business stress, and public trust. The underlying analytical point is that

energy price shocks in Nigeria do not remain confined to the petroleum sector; they spread across the social economy and alter the security conditions of everyday life.

Findings

The first major finding of this paper is that subsidy removal in Nigeria has immediate and extensive human security consequences because petrol occupies a central place in the everyday economy. In many countries, fuel is important. In Nigeria, it is foundational. It powers transportation, supports informal trade, sustains small enterprises, and compensates for inadequate public electricity. As a result, an increase in petrol price affects almost every household, including those that do not own private vehicles (Shekoni, 2026).

The second finding is that the burden of subsidy removal is socially unequal. Higher-income groups may absorb price shocks more easily, but low-income households experience them as direct threats to survival. For workers paid fixed wages, transport costs rise faster than income. For market women and small traders, logistics costs reduce already narrow margins. For students and patients, mobility becomes less secure. For rural and peri-urban households, food distribution shocks can deepen deprivation. This means the human security cost of the reform falls heaviest on those least able to bear it (Shekoni, 2026).

The third finding is that inflation is the main channel through which subsidy removal undermines human security. The petrol price data provide a clear indicator of the magnitude of the shock, while broader inflation data confirm that the reform unfolded within a difficult macroeconomic environment (National Bureau of Statistics, 2024; World Bank, n.d.). When fuel prices rise in such a setting, the result is not a one-off adjustment but a cascading increase in the cost of living. Food, transportation, school fees, rent pressures, and healthcare access all become more difficult to manage.

The fourth finding is that the legitimacy of subsidy reform depends heavily on public trust, and this trust remains weak in Nigeria. Many citizens do not oppose reform only because prices increase; they also resist because they doubt whether the sacrifice will produce public benefit. The history of corruption, poor service delivery, and unmet promises has created a credibility gap. Thus, even where the economic argument for reform is strong, the political and social environment may render the reform fragile.

The fifth finding is that subsidy removal can produce long-term opportunities if managed properly. Removing an expensive and distortionary subsidy can improve fiscal stability and potentially redirect resources toward productive sectors. The policy can also incentivize domestic refining and reduce arbitrage opportunities associated with price differentials. However, these gains are contingent rather than automatic. Without strong institutions, transparent accounting, and visible public investment, expected benefits may remain abstract while social pain remains concrete.

The sixth finding is that mitigation responses have often not matched the scale of the shock. In principle, cash transfers, transport subsidies, wage support, school feeding, health subsidies, and rural logistics measures could reduce the human cost of reform (Shekoni, 2024). In practice, the reach, timing, and credibility of such measures have often been limited. This asymmetry between rapid market liberalization and slow social cushioning is one of the main reasons the reform has been experienced as insecurity rather than transition.

Results

The results of this study may be summarized in analytical terms. Subsidy removal in Nigeria has produced a dual outcome. At the macroeconomic level, it opens a pathway toward fiscal rationalization, reduced price distortion, and potential restructuring of the petroleum sector. At the human level, however, it has intensified vulnerability through inflation, reduced purchasing power, and wider welfare insecurity.

The evidence suggests that the reform has had stronger immediate negative effects on economic security, food security, and social stability than its defenders often acknowledge. The increase in petrol prices transmitted rapidly into daily life, affecting transportation, household expenditure, and market prices. In a setting already characterized by poverty and institutional fragility, these pressures directly weakened human security.

At the same time, the results do not support a simplistic return to universal subsidy as a durable solution. Rather, they indicate that the real policy failure lies in the design and governance of reform. A universal subsidy may be inefficient and corrupt, but abrupt removal without robust safety nets is socially damaging. The results therefore favor a human-centered reform model in which economic adjustment is combined with visible, accountable, and targeted welfare protection.

7.1 Implications for Human Security in Nigeria

In terms of economic security, the reform has weakened the purchasing power of wage earners, informal workers, pensioners, and the unemployed. Even where nominal income remains unchanged, real income declines when transport and food costs surge. This effect is particularly harmful in a country where a large proportion of workers operate in the informal sector without dependable social insurance.

In relation to food security, higher fuel prices raise the cost of transporting farm produce, preserving goods, and running small-scale processing businesses. The result is higher consumer prices and reduced dietary quality for poorer households. Where families must choose between transport, school costs, medicine, and food, nutrition suffers first and most silently.

Regarding health security, subsidy removal may indirectly reduce access to care. Higher transportation costs make it more difficult for patients to reach clinics and hospitals. Rising energy costs also affect private health facilities, many of which rely on petrol or diesel generators because of erratic electricity supply (Shekoni, 2025). These costs are often passed on to patients.

With respect to education security, children from low-income households may experience increased absenteeism when commuting becomes more expensive or when families reallocate resources toward food and survival. The burden may be especially severe in urban peripheries and rural communities where distance to school already poses difficulties.

For personal and community security, sustained hardship can heighten desperation, deepen social frustration, and increase the risk of petty crime, protest escalation, or localized instability. Economic stress does not automatically produce violence, but it can create conditions in which insecurity becomes more likely, especially where trust in institutions is low.

In terms of political security, citizens may feel alienated when they perceive reforms as externally validated but domestically unjust. Where state explanations are not matched by social relief or visible developmental outcomes, public confidence weakens. This can erode democratic legitimacy and intensify antagonism between the government and organized social forces.

Conclusion and Recommendations

The removal of fuel subsidy in Nigeria represents a major economic reform with significant consequences for human security. Although the policy can be defended on the grounds of fiscal sustainability, efficiency, and long-term structural correction, its implementation has exposed millions of Nigerians to immediate hardship. The rise in petrol prices has transmitted across transportation, food systems, health access, and household welfare, thereby deepening economic insecurity and social stress.

This paper has shown that the true significance of subsidy removal cannot be understood through fiscal indicators alone. It must be evaluated in relation to how people live, move, feed their families, access care, and maintain dignity under conditions of economic strain. From a human security standpoint, reform without cushioning is not neutral. It redistributes risk downward, often onto those least able to absorb it.

The central lesson is not that subsidy must be preserved forever, nor that all reform is inherently anti-poor. Rather, it is that socially legitimate reform requires trust, sequencing, transparency, and protection for vulnerable groups. In Nigeria, the sustainability of subsidy removal will depend less on the announcement of deregulation and more on whether citizens can see tangible evidence that the burdens they bear are matched by public benefit.

A human-centered subsidy reform strategy in Nigeria should begin with transparent accounting of savings. Citizens need a credible public mechanism showing how funds previously used for subsidy are being reallocated. Without this, reform will remain politically suspect and socially fragile.

There is also an urgent need to expand targeted social protection. Cash transfers should be timely, verifiable, and focused on the most vulnerable households. However, cash support alone is not enough. Transport assistance, school feeding, primary healthcare subsidies, and rural logistics interventions are equally important if the state intends to reduce the welfare shock.

Government should invest aggressively in public transportation systems. In the Nigerian context, transport is one of the main channels through which fuel shocks spread into household suffering. Functional mass transit can significantly reduce the cost-of-living impact of petroleum price increases.

A phased and better-sequenced approach to reform would also improve outcomes. Major price liberalization should be accompanied by visible parallel measures in wages, transport, food systems, and social protection. Reform that arrives all at once while relief arrives slowly is almost guaranteed to deepen insecurity.

Domestic refining capacity must be improved as a strategic priority. A country with Nigeria's oil endowment should not remain structurally vulnerable to the welfare effects of imported refined fuel. Expanding refining and stabilizing supply chains would reduce exposure to external price transmission.

Policy communication should become more transparent and participatory. Citizens are more likely to accept painful reforms when government acknowledges trade-offs directly, engages labor and civil society meaningfully, and provides evidence of implementation rather than promises alone.

Finally, economic reform should be embedded within a broader human development agenda. If subsidy removal is not accompanied by investment in jobs, electricity, agriculture, health, and education, it will continue to be seen as a policy that asks for sacrifice without social return.

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