# GUINEA Food Security Outlook — February through September 2017

## Overall good food stocks with the end of the growing season

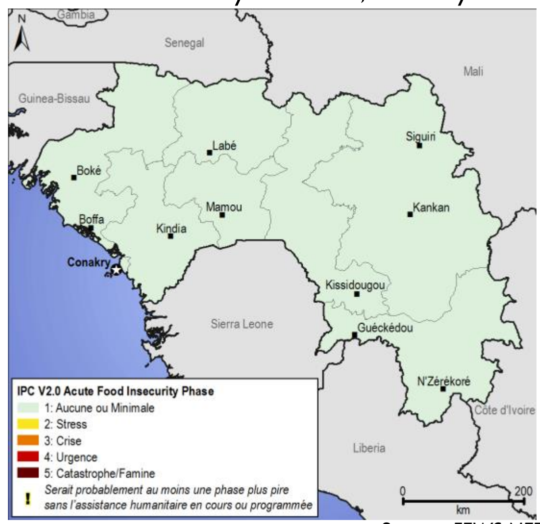
### KEY MESSAGES

- Post-harvest activities, such as the threshing of rice crops in mangrove and alluvial plain and lowland areas, and the cleaning and drying of cassava crops and market gardening, activities are still underway in most prefectures across the country, providing households with typical levels of food and income.

- Food reserves are being steadily replenished with the completion of the average to above-average harvests for the 2016/17 season across the country. However, certain areas affected by dry spells, floods, and infestations of potato crops in Middle Guinea in August 2016 have reported small production shortfalls.

- There are adequate market supplies of cereals, and food reserves are being replenished with fresh crops from the good harvests across the country. Rice prices will be relatively stable for the next three months before rising in anticipation of the month-long observance of Ramadan. Prices for imported foods such as sugar, onions, and cooking oil will follow this same trend. There will be a seasonal rise in prices with the depletion of household food stocks between June and August, which marks the lean season in Guinea.

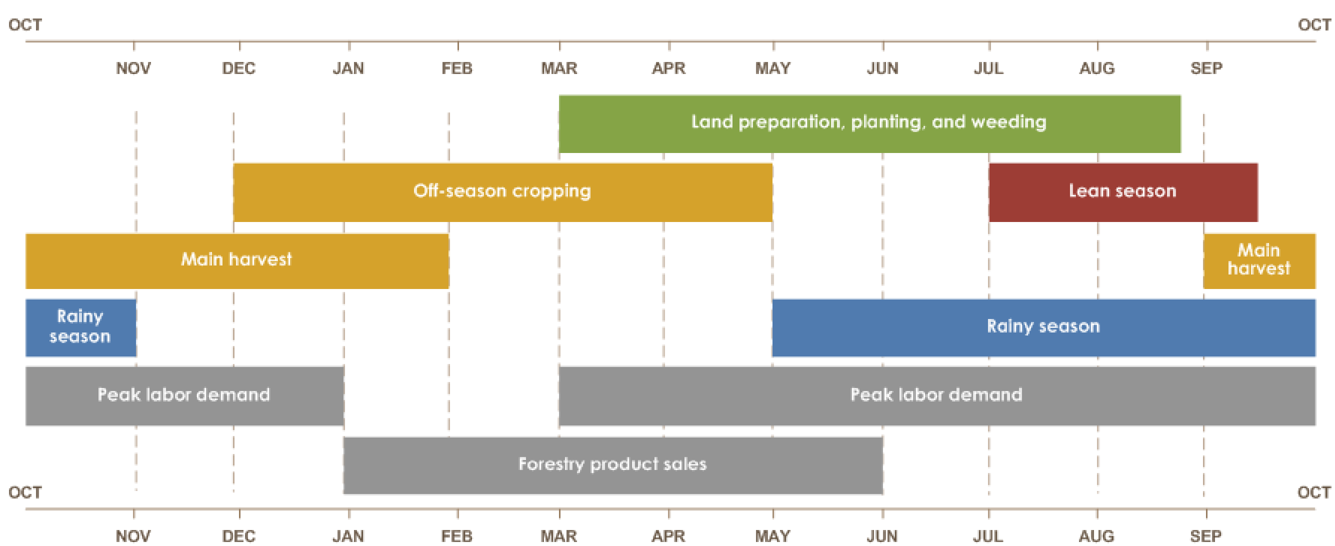
Current food security outcomes, February 2017




Source: *FEWS NET*

This map shows relevant current acute food insecurity outcomes for emergency decision-making. It does not reflect chronic food insecurity.

### SEASONAL CALENDAR FOR A TYPICAL YEAR




Source: *FEWS NET*

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## National overview

*Current situation*

**Cereal production**

Despite the reported weather anomalies during the 2016/2017 growing season (floods, dry spells, and pest infestations of potato crops in Fouta), there are generally average to above-average levels of national cereal production for this past growing season, which is improving household food availability. However, there are reports of localized shortfalls in cereal production in general and rice and maize production in particular, primarily in Siguiri.

The flooding at the end of July/beginning of August and the ensuing dry spells reduced rice production in certain parts of Lower Guinea such as Boffa and Boké. Market gardening activities are still underway, providing average to above-average revenues for farming households engaged in these activities.

Food stocks are being replenished with fresh crops from the average to above-average harvests and income from the sale of market garden crops, which is improving dietary diversity and keeping poor households from becoming market-dependent.

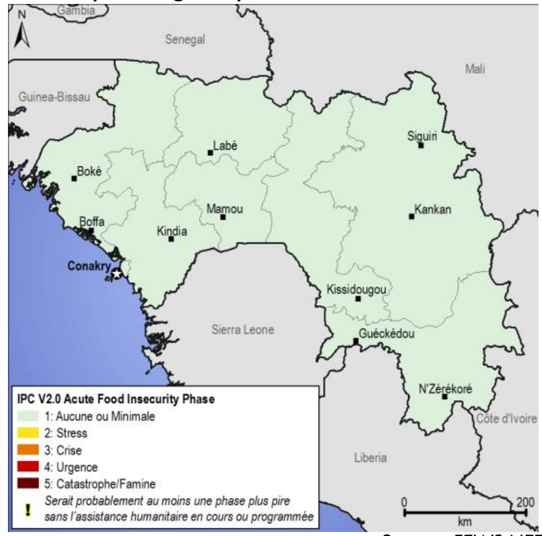
**Cash crops**

Trade in crops on domestic (cereals, tubers, and oilseeds), border (palm oil, potatoes, peanuts, and market garden produce), and international (coffee, cocoa, pineapples, cashews, and rubber) markets has been steadily picking up since the eradication of Ebola virus disease. The steady drop in the international market price of rubber for the past several months is not likely to inspire an expansion in these crop-growing activities. On the other hand, the expansion in domestic cashew production due to its attractive price since last year is generating above-average levels of income for households growing these crops.

**Pastoral conditions**

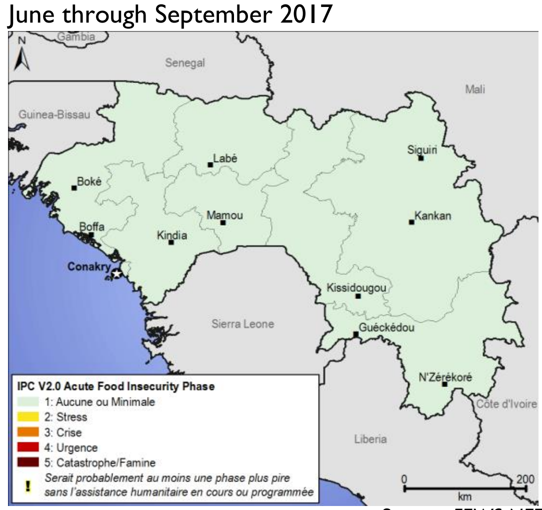
Conditions are stable, with no signs of any major epizootic outbreaks. The good levels of pasture and watering holes with the heavy rainfall activity are creating good animal watering conditions and keeping livestock (cattle, sheep, and goats) in good physical shape, which should help improve milk production. There are no reports of any major disputes between farmers and pastoralists.

Most likely estimated food security outcomes for February through May 2017




Source: *FEWS NET*

Most likely estimated food security outcomes for June through September 2017




Source: *FEWS NET*

**Fishing conditions**

In addition to ocean fishing activities and fishing activities in large rivers and streams, there are growing numbers of fish farming operations, particularly in the Forest Zone, which are helping to improve the availability of fish as well as the incomes of fishing households. Available fish stocks for this season are better than last year and above the five-year average.

There are adequate market supplies of fresh and frozen fish and processed fish products. Supply levels are average compared with last year and satisfactory compared with the average for the last three years.

**Cereal markets**

The marketing season for locally grown crops and presence of imported rice are ensuring regular market supplies of cereals. Market cereal supplies are average compared with last year and close to the five-year average. Prices for rice (local and imported varieties), which is the main cereal consumed by Guinean households, are presently stable. Despite the good marketing season for locally grown crops, prices for local varieties of rice have not dropped in line with normal seasonal trends and are still between 5000 and 6500 GNF/kg. Prices for imported rice have inched up slightly from 5500 GNF in 2016 to 6000 GNF in 2017. The current situation is relatively similar to trends in the last five years.

There are more than adequate supplies of animals on livestock markets. Supplies are slightly lower than last year with certain pastoralists driving their herds to grazing areas and, in some cases, Sierra Leone.

The rise in prices for livestock and meat by approximately 10 percent since last year is holding, which is limiting access to this food source for poor households. Price levels are up from the same time in 2016 and above the five-year average.

**Economic activity**

With the growing importance of gold mining activities in this country, the government has passed legislation for the launching of pilot projects, the completion of the survey, and the parceling process already underway in all gold-bearing areas. The legislation is designed to help mainstream artisanal gold-mining operations into the formal sector of the economy.

The government incentives designed to promote the development of cashew production will allow growers to earn amounts of income from these activities. The steady devaluation of the local currency will help promote exports of Guinean crops (small quantities), but will hurt consumers looking to purchase imported foods.

Most migration is to mining areas within the country and in neighboring countries. Migration income helps households improve their standard of living and finance other economic activities such as trade and motorbike taxi services in cities and large population centers. Income from foreign remittances is oftentimes invested in farming activities, though there is very little data with respect to the amount of income involved and the sector in which it is used.

**Food security situation**

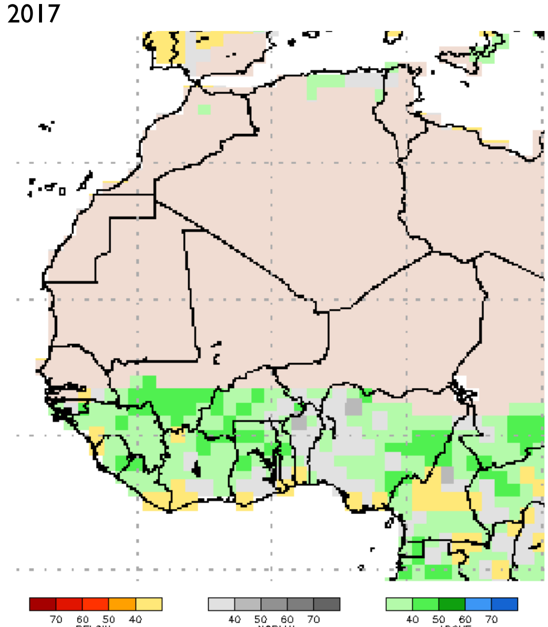
In general, crop production for this year is similar to last year's production and above the five-year average. This is helping to promote good cereal availability across the country and good food consumption. Current prices for rice, the main cereal consumed by Guinean households, and average supplies of tubers and market garden produce are helping to give most households average food access. Thus, all regions of the country are currently experiencing Minimal (IPC Phase 1) food insecurity.

*Assumptions*

The most likely scenario for February through September 2017 is based on the following assumptions with respect to nationwide conditions:

- **Rainfall**: The first rains for 2017 have already fallen in Yomou prefecture in the Forest Zone and Dalaba prefecture in Middle Guinea. The first rains normally begin in April in all parts of the country and continue through the month of September, peaking in July/August/September. Cumulative rainfall totals are expected to be near-average, producing typical levels of seasonal flooding.
- **Crop production**: The ANASA (National Bureau of Agricultural Statistics) estimates the growth rate for rice production in Guinea at 6.17 percent. The expected average rainfall will allow for the timely planting of the usual areas in crops in all parts of the country. The pursuit of hydro-agricultural development projects and the farm input assistance (seeds, fertilizer, and plant health products) provided by the government to boost crop yields will help promote average to above-average levels of crop production for 2017-2018 in all parts of the country, with harvests getting underway by the end of August or the beginning of September.

**Figure 1.** Rainfall outlook for April through June 2017




Source: *NOAA*

- **Cash crops:** In general, revenues from cash crops for the 2016/2017 season will be larger than last year and above the five-year average with the revitalization of cashew and cotton production and the rebound in crop trading activities (for palm oil, peanuts, and pineapples) on cross-border and international markets. The peak period for this source of income-generation is between April and June. The losses from the fungal infestations of potato crops in Fouta in August 2016 will be brought way down for the 2017/2018 season compared with last year by the various control measures implemented by farmers' organizations and extension workers (availability of plant health products, introduction of new improved seeds, farmer training in crop management techniques).
- **Market garden production:** The current expansion of market gardening activities in most Guinean prefectures driven by the high levels of income-generation from these activities and the training of farmers in crop management techniques by specialized agencies will help promote average to above-average levels of crop production between February and September 2017.

*Sources of food and income*

- **Migration:** There will be average to above-average levels of income from mining activities (gold, diamonds, and bauxite) with the expansion in mining areas compared with previous years in spite of the new envisioned measures affecting artisanal mining activities requiring miners to obtain a license and the sharp decline in the productivity of diamond mining operations. The growing numbers of bauxite mining companies in Lower Guinea will attract even more labor, producing large amounts of migration income.
- **Farm labor:** As usual, the smaller labor pool with the departure of workers for gold mining sites and the failure by more and more of these workers to return home to engage in farming activities will keep wage rates high. As a result, wage rates will be above-average but, in general, will generate below-average levels of wage income due to the smaller than average numbers of farm laborers.
- **Fishing:** Fishing activities, starting up in October 2016, will continue through June 2017 with the falling water levels on inland waterways for freshwater fishing activities. There will be a slowdown in both ocean fishing and inland fishing activities in July-August and September at the height of the rainy season. The larger catches between February and June will strengthen the incomes of fishing households, putting them at or above the average.
- **Pastoral conditions:** The timely start of the rains in May 2017 will help spur the usual new pasture growth and replenishment of watering holes, promoting a normal return in animal production. This year's stable animal health conditions should continue through September 2017.
- **Income from livestock-raising activities:** The expected levels of animal production should help pastoral households generate average amounts of income from the sale of animals, milk, skins, and hides, particularly with the favorable conditions created by the pick-up in cross-border trade and steady devaluation of the Guinean franc against foreign currencies. Prices will stay above figures for last year and the five-year average.

*Markets*

- **Market supplies:** With the crop marketing season in progress in all parts of the country, food stocks are at good levels and there are good market supplies. Moreover, available supplies of imported rice will maintain good cereal availability on local markets through September 2017 and keep prices relatively stable and, thus, affordable for poor households.
- **Cross-border trade:** In spite of a few problems with road harassment, there will be a steady normalization of trade between Guinea and neighboring countries and other countries around the world throughout the outlook period (February through September 2017).
- **Food prices:** The good harvests for the 2016/2017 crop year will keep rice prices stable through June. This will be followed by small price increases between July and August, with the presence of fresh crops on local markets stabilizing prices as of September 2017. Prices for locally grown parboiled rice have been relatively stable, at between 5000 and 6500 GNF/kg, while the price of imported parboiled rice is up from 5000 to 5500 GNF/kg, or by approximately 10 percent. Prices for imported milled rice range from 4000 to 4500 GNF/kg. These prices will remain stable, facilitating access to rice supplies for most households.
- **Prices of cash crops**: In general, prices for all major cash crops will stay in line with the average throughout the outlook period from February through September. The good marketing season between March and June 2017 will

bring the exceptionally high price of oil in February back down to normal levels. Prices for cashews have been on the rise ever since the government set a farm-gate floor price of 5000 GNF/kg in April 2016.

- **Socioeconomic environment:** The steady devaluation of the Guinean franc will help promote exports, particularly of food crops and animal products.

*Most likely food security outcomes*

The good household food availability with the good harvests between October 2016 and January 2017 will continue to improve the food security situation through June 2017. The normal decline in household food stocks in July and August will be eased by the harvests of fresh crops early in September. The current average to large availability of locally grown (cereals, tubers, and oilseeds) and imported crops at the end of the growing season will help keep food prices close to average, which will help give households average food access. Average levels of household income from the normal pursuit of income-generating activities throughout the outlook period will help most households maintain an average diet. Even with the usual decline in food availability and dietary diversity between July and August, which marks the lean season in Guinea, households will continue to experience Minimal (IPC Phase 1) food insecurity through September 2017 owing to the stable near-average prices of local and imported varieties of rice. There should be an improvement in the food security situation in September with the first harvests of upland rice, maize, fonio, and cassava, compared with conditions during the lean season.

## AREA OF CONCERN

### Guéckédou and Macenta prefectures in the N'Zérékoré region in the Forest Zone

Macenta and Guéckédou prefectures lie in the forest zone with a production system based on the growing of crops in hillside, plain, and lowland areas. The main types of crops include cereals (mainly rice), tubers (cassava, taro, and potatoes), oilseed crops (peanuts and oil palms), and market garden produce. Fishing and the growing of export crops (coffee, cocoa, cola nuts, and rubber) are also important activities. As a quintessential crop production hub, this area feeds the large flow of cross-border trade with neighboring countries. Migration, mainly to gold mining areas, is another source of income.

*Current situation*

**Farming conditions:** With the good rainfall conditions and the assistance furnished by the government and its development partners to households in this area, crop production is up from last season and above the five-year average despite the few reported delays in the start-of-season and usual pockets of flooding. Households have sufficient food supplies to meet their needs for the next four months and are engaged in market gardening activities as a source of income-generation.

**Rubber production:** The falling world market prices of rubber for the past few years are an obstacle to the expansion of these highly important crop-growing activities for planter households in Macenta. The rally in rubber prices from 2000 GNF/kg in early 2016 to 2500 GNF/kg in July was not much of an incentive for households to further invest in expanding these crops and maintaining their family plantations.

**Fishing conditions:** The fish ponds established in most prefectures in Guinea's Forest Zone, particularly in Macenta and Gueckedou, and inland fishing activities in rivers and large streams are currently helping to produce lucrative amounts of fish. The large availability of fish is improving household income. Current production levels are above the five-year average.

**Food markets and prices:** The large harvests of crops for the current growing season are helping to ensure good market supplies. However, these good supplies have only brought prices down slightly. On average, prices range from 4800 to 5500 GNF/kg in practically all parts of the Forest Zone, depending on quality factors. The reported rises in livestock prices (for cattle, goats, sheep, and hogs) since September 2016 and the pick-up in cross-border trade in livestock will keep prices stable through next September.

**Labor:** The daily wage rate is in line with the norm, at a fixed 30,000 GNF/day, with workers permanently settling in gold mining (Siguiri, Mandiana, Dinguiraye, and Kouroussa) and diamond mining areas (mainly Kérouané). February 6, 2017 marked the celebration of "gold mining day" in Kankan. Current measures designed to promote the rational working of these mines are certain to affect wage rates with the return of certain workers failing to meet the necessary criteria to their home areas.

**Humanitarian assistance:** Humanitarian assistance is limited mainly to WFP support for ongoing school meal programs. The Post-Ebola Multisector Recovery Program (ORME) designed to assist Ebola survivors and orphans in this area was suspended in July 2016 and is currently being redesigned.

**Nutritional situation:** Despite the impact of Ebola virus disease, the improvement in household livelihoods and the good harvests are strengthening food availability and nutritional conditions.

**Food security situation**

The good harvest is improving food availability and dietary diversity and enabling area households to sell part of their food stocks as a source of income. Stable prices are helping to give poor households access to crops (particularly rice and cassava). Market gardening activities, upcoming harvests of palm oil (between April and June), and the recovery on domestic, sub-regional, and international markets are all sources of income-generation enabling households to earn substantial amounts of income to help meet their food and nonfood expenses. Accordingly, households in this area are currently experiencing Minimal (IPC Phase 1) acute food insecurity.

### *Assumptions*

The most likely scenario for February through September 2017 in Guéckédou and Macenta is based on the following assumptions in addition to the assumptions with respect to nationwide conditions:

- **Crop production**: There will be above-average harvests (of rice, fonio, maize, cassava, and market garden crops) beginning in early September as a result of the assistance provided by the government and its partners and, in particular, due to the large areas planted in crops in spite of the few reported climatic anomalies.
- **Rubber:** The overall below-average volume of production and continued free fall in international rubber prices (which is an export crop) will drive the incomes of rubber-growing households down below-average.
- **Potatoes**: The decline in potato production in the Fouta in the past months has reduced consumption of this crop. Prices doubled between August and October, but will come down with the relative success of fungus control efforts and the promising production prospects, putting fresh crops on the market by the second half of March 2017.
- **Cashews**: The farm-gate floor price of cashews set by the Guinean government in 2016 helped revive this activity. Many farm operators have begun to grow and market this crop, whose unit price is currently over 12,000 GNF compared with only 2000 GNF a mere three years ago. This rally in its market price will help significantly boost the incomes of growers and traders to well-above-average levels.

### *Most likely food security outcomes*

Harvests for the 2016/2017 growing season will enable area households to build large enough food reserves to last them at least through June 2017, which will help promote good dietary diversity and average levels of food consumption. As usual, the first rains of the upcoming 2017/2018 season will start to fall in April, jump-starting the new growing season. The extremely good weather conditions in this area point to a good start-of-season, with harvests of early crops expected in September 2017.

The stable average to above-average levels of income from the sale of palm oil between June and August 2017 and market garden crops will enable area households to meet their food and nonfood expenses. Income from crop sales both within the country and in neighboring countries with the good pick-up in cross-border trade will help give households average market access to meet their needs. Generally stable food prices will help give households average market access to meet their food needs in spite of the decline in income from rubber production due to the fluctuating price of this product. Accordingly, most households will experience Minimal (IPC Phase 1) food insecurity between February and September 2017.

## EVENTS THAT COULD CHANGE THE OUTLOOK

**Table 1:** Possible events in the next eight months that could change the outlook

| Area | Event | Impact on food security conditions |
|---|---|---|
| National | New large-scale Ebola outbreak in Guinea and neighboring countries | Implementation of restrictive measures detrimental to household socioeconomic activities, market disruptions, border closures, and slowdown in cross-border trade |
| Guéckédou/Macenta | Larger than average pockets of drought at the beginning of the growing season | Withering of certain crops, lower levels of crop production liable to disrupt markets and help drive up prices and limit the availability of harvests of early crops putting an end to the lean season |
| Forest Zone | Rebound in rubber prices between February and September 2017 | Improvement in the incomes and purchasing power of area households |

## ABOUT SCENARIO DEVELOPMENT

To project food security outcomes over the upcoming eight-month period, FEWS NET develops a set of basic assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to develop scenarios predicting food security outcomes. Typically, FEWS NET bases its projections on the most likely scenario. Learn more here.