



Famine Early Warning Systems Network

# FOOD SECURITY OUTLOOK FOR GUINEA, LIBERIA, AND SIERRA LEONE

January to June 2015

InterAction  
January 7, 2015  
Washington DC

*Guinea, Liberia, and Sierra Leone are FEWS NET remote monitoring countries. In remote monitoring, a coordinator typically works from a nearby regional office. Relying on partners for data, the coordinator uses scenario development to conduct analysis and produce monthly reports. As less data may be available, remote monitoring reports may have less detail than those from countries with FEWS NET offices.*

# Key messages

- Ebola-related fears and official restrictions on population movements have limited market functioning and typical livelihood activities across the region.
- 2014/15 harvests are expected to be average to slightly below-average.
- As most agricultural households are consuming their recent harvests, food security outcomes are currently most severe amongst households directly impacted by Ebola and poor, non-agricultural households residing in worst-affected zones.
- As households become increasingly market dependent during the first quarter of 2015, atypically poor purchasing power will limit food access. By June 2015, Stressed (IPC Phase 2) and Crisis (IPC Phase 3) food insecurity is expected for poor households across much of the region.


# Agenda

- Context/background information
- Current acute food insecurity
- Assumptions and analysis through June 2015
- Events that could change the scenario

# Information Sources

- FEWS NET key informants
- Bi-monthly SMS-based trader survey
  - Over 400 traders in 15 counties of Liberia
  - Over 300 traders in 14 districts of Sierra Leone
- Information from partner organizations

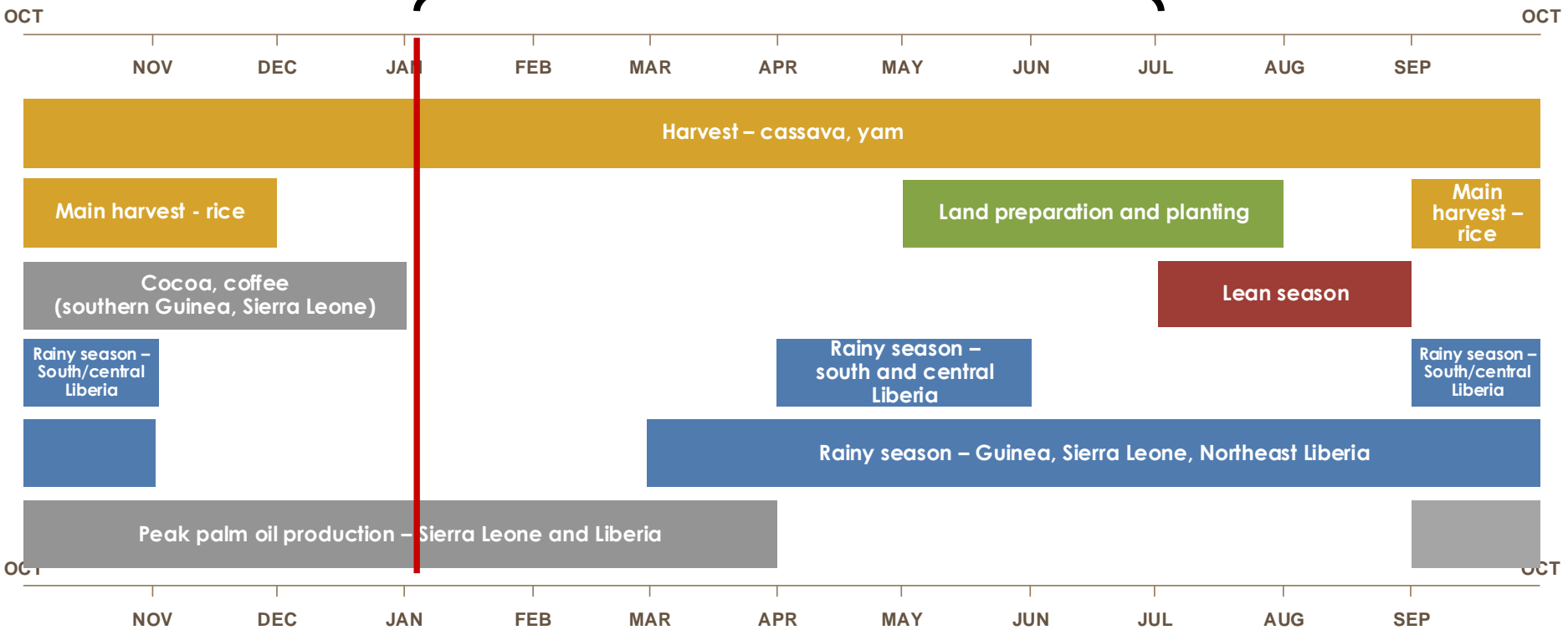
# IPC 2.0 acute area phase classification

PHASE 1 Minimal	Households are meeting their basic food and nonfood needs without unsustainable coping strategies.	
PHASE 2 Stressed	Household food consumption is minimally adequate. Households are unable to afford some essential nonfood expenditures without unsustainable coping strategies.	
PHASE 3 Crisis	Households face food consumption gaps or are only meeting minimal food needs through unsustainable coping strategies.	URGENT ACTION REQUIRED  
PHASE 4 Emergency	Households face extreme food consumption gaps or are experiencing extreme loss of livelihood assets that will likely lead to food consumption gaps.	
PHASE 5 Famine	Households have a near complete lack of food and/or other basic needs. Starvation, death, and destitution are evident.	
!	Phase classification would likely be worse without current or programmed humanitarian assistance.	

# Seasonal calendar for a typical year

Guinea, Liberia, and Sierra Leone

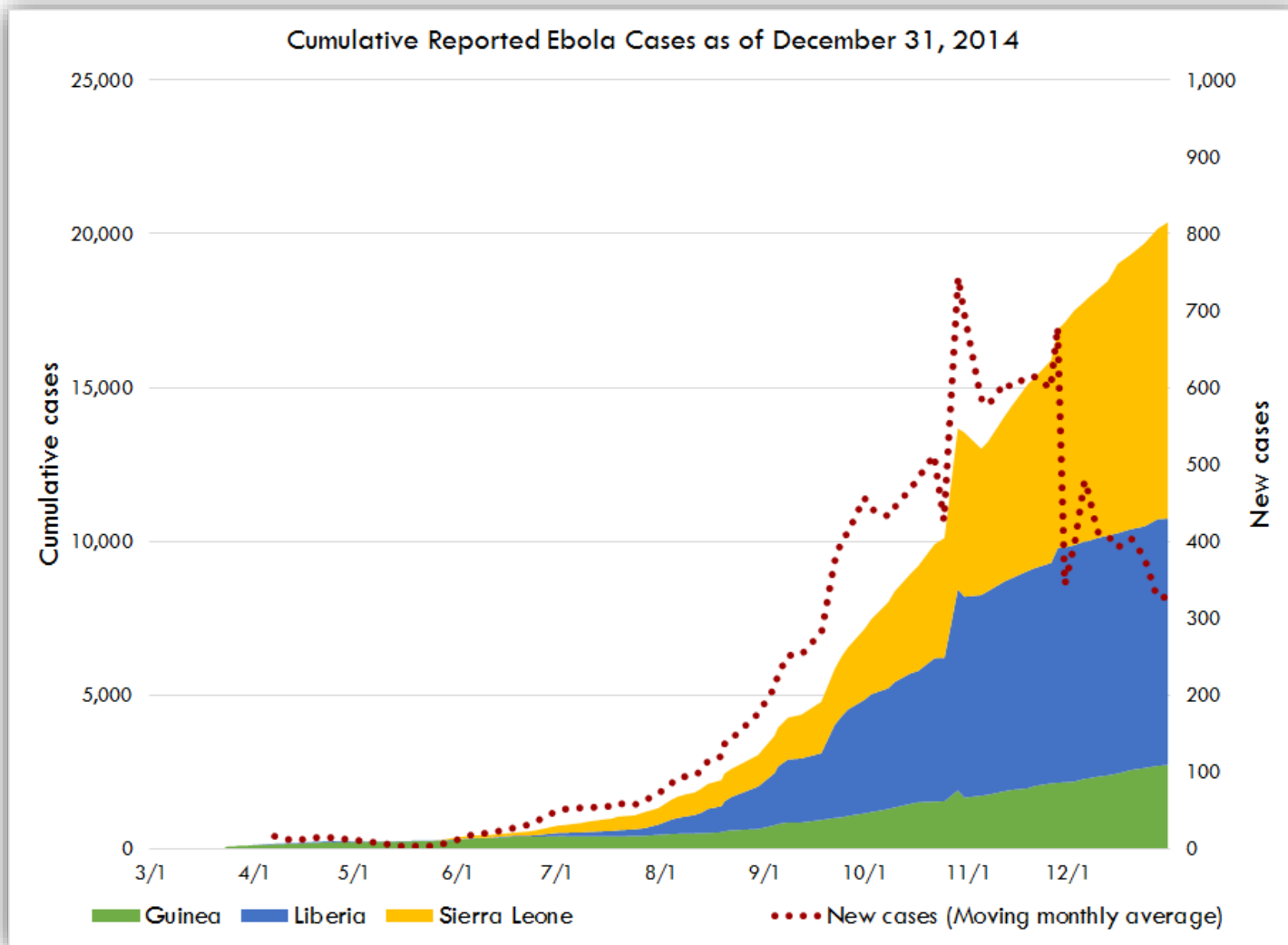
Projection period



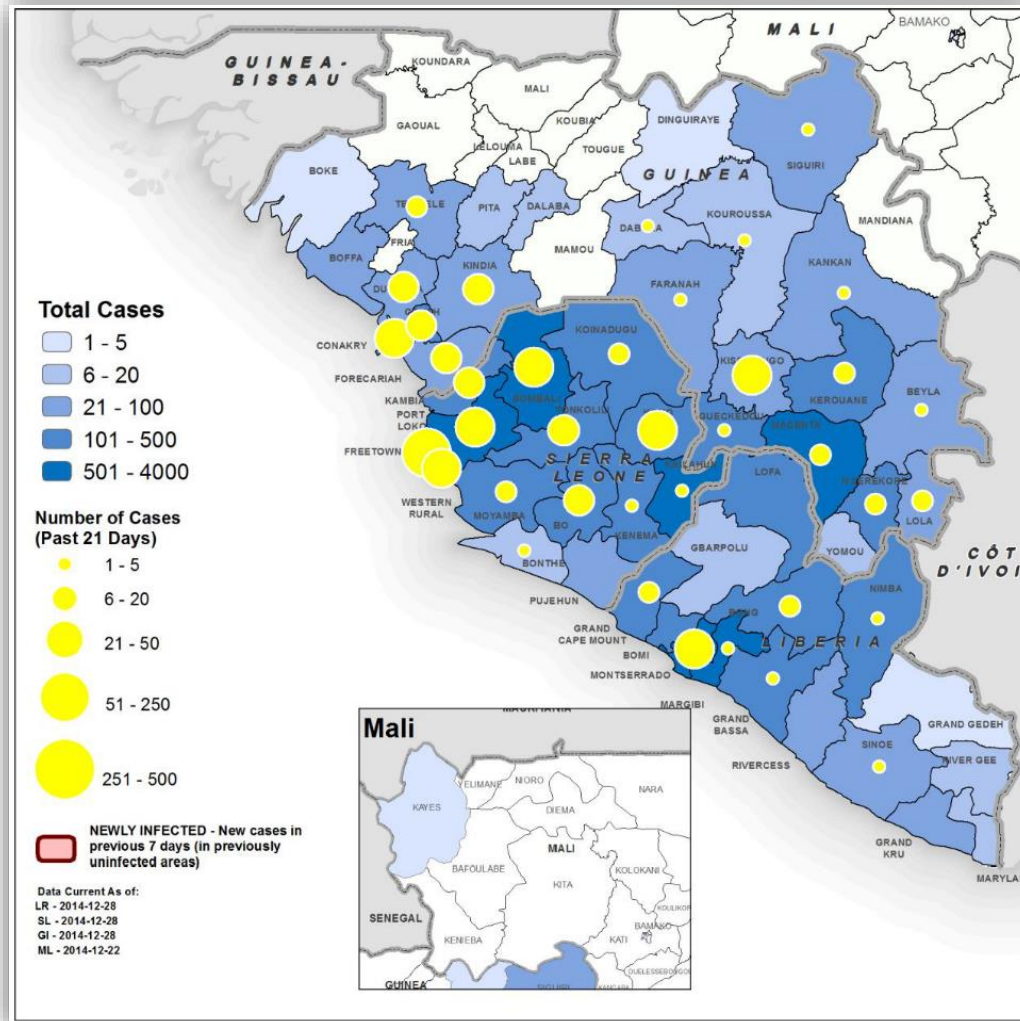
Source: FEWS NET

# **DRIVERS OF CURRENT ACUTE FOOD INSECURITY**

# High transmission rates continue in Sierra Leone



# Distribution of new Ebola cases



## Relatively average paddy rice production

	2014 Production (tonnes)	2013 Production (tonnes)	5-Year Average (tonnes)	% Change Last Year's Levels	% Change 5- Year Average
Guinea	1,976,754	2,053,359	1,918,841	-4%	3%
Liberia	262,570	269,550	292,728	-3%	-10%
Sierra Leone	1,155,114	1,255,559	1,141,417	-8%	1%

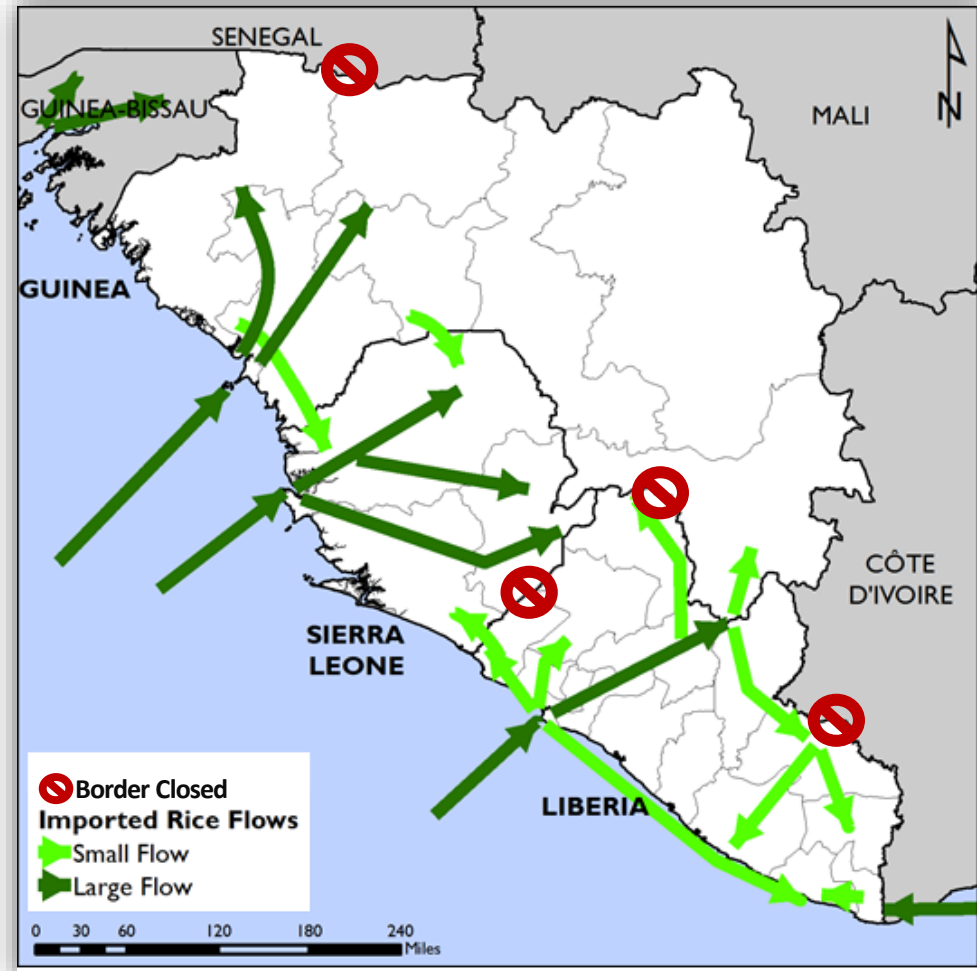
Source of 2014 estimates: WFP/FAO; Source of estimates for other years: AGRHYMET

- Areas estimated to have the most significant declines in production:
  - Kailahun, Sierra Leone
  - Lofa and Margibi, Liberia
  - Nzerekore, Guinea

# Border closures disrupt trade and HH incomes

- Liberia's borders, as well as the Guinea/Senegal border, remain closed
- Guinea's borders with Guinea-Bissau, Cote d'Ivoire, and Sierra Leone recently reopened
- Major ports open and functioning

Imported rice trade flows and border closures



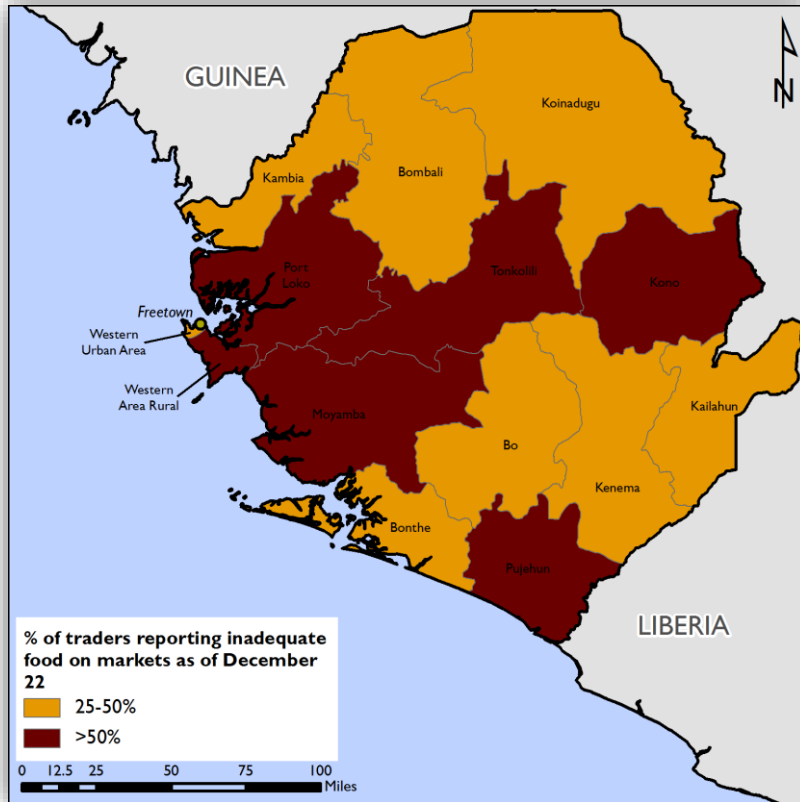
# Many markets closed or operating at reduced levels

Status of weekly markets (Week of December 22)	Liberia (% of respondents)	Sierra Leone (% of respondents)
Open and functioning normally	60%	27%
Open but operating at reduced levels	37%	45%
Closed	4%	28%

Source: FEWS NET's SMS-based trader survey

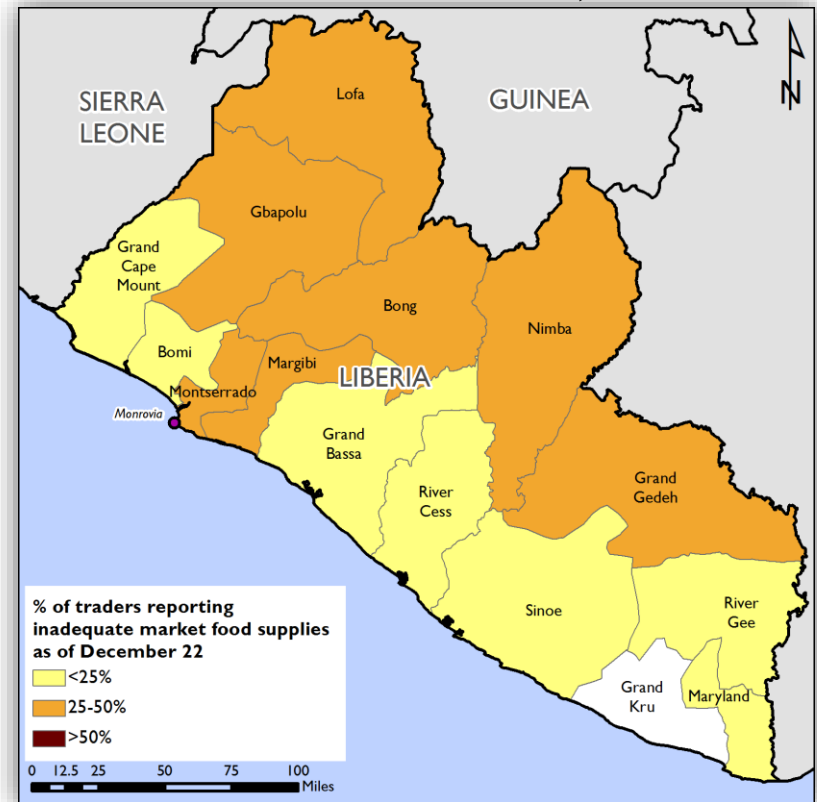
# Traders report inadequate food availability

Percentage of traders reporting inadequate food on local markets  
– Week of December 22, 2014



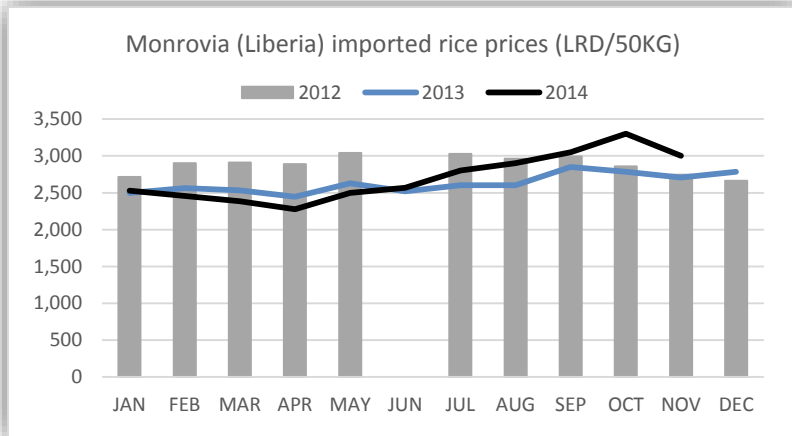
Source: FEWS NET's SMS-based trader survey

Percentage of traders reporting inadequate food on local markets  
– Week of December 22, 2014

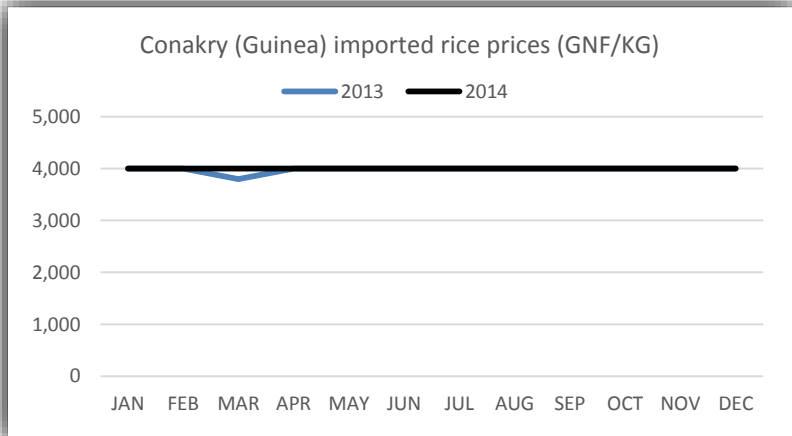


Source: FEWS NET's SMS-based trader survey

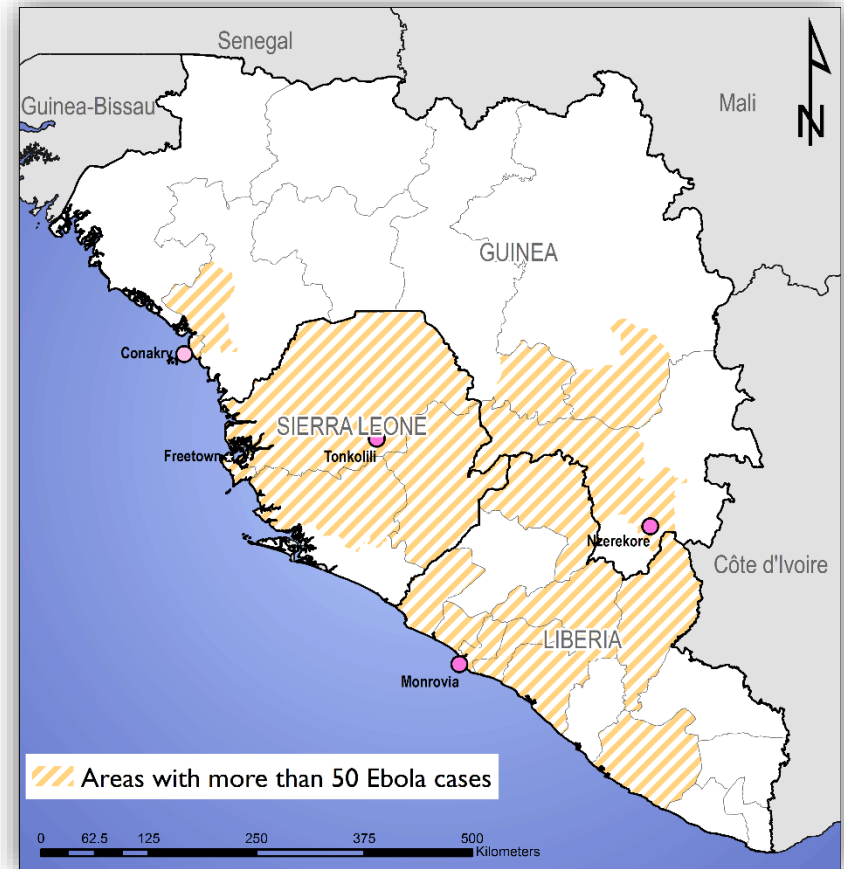
# Trends for imported rice prices vary across the region



Source: WFP

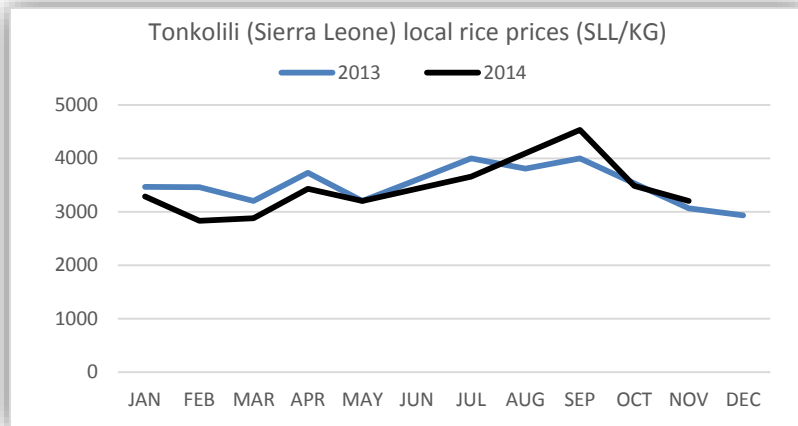


Source: SIPAG

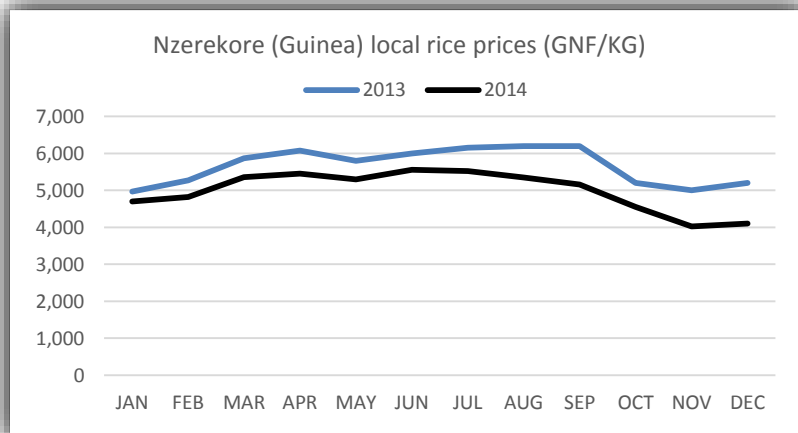


Source: WHO

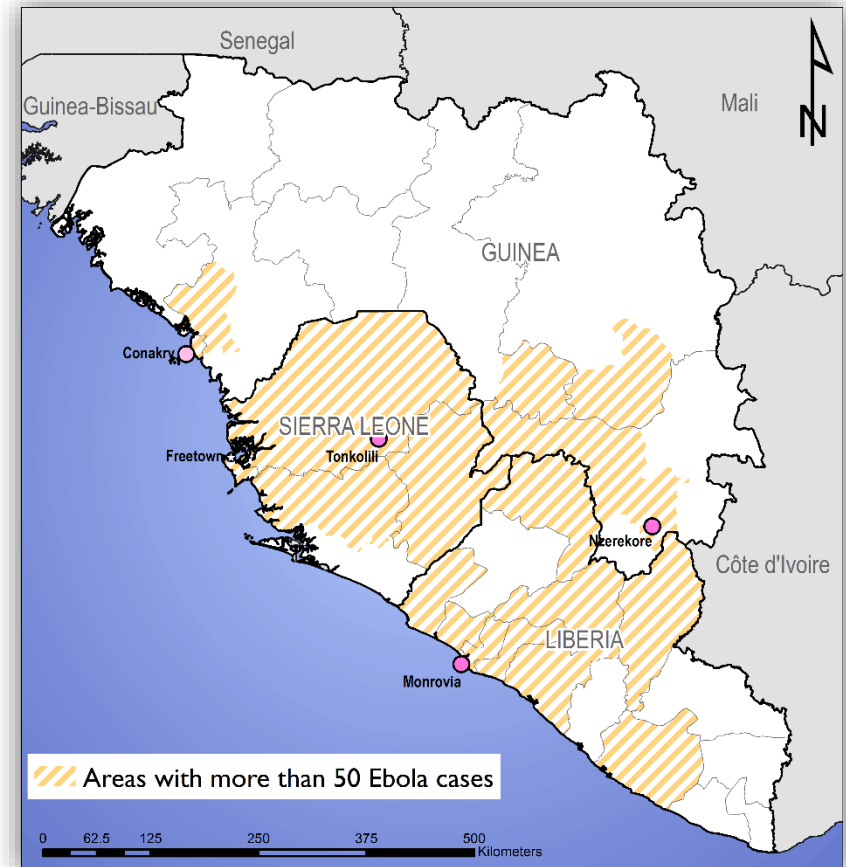
# Similar situation for local rice prices



Source: Ministry of Agriculture Food and Food Security



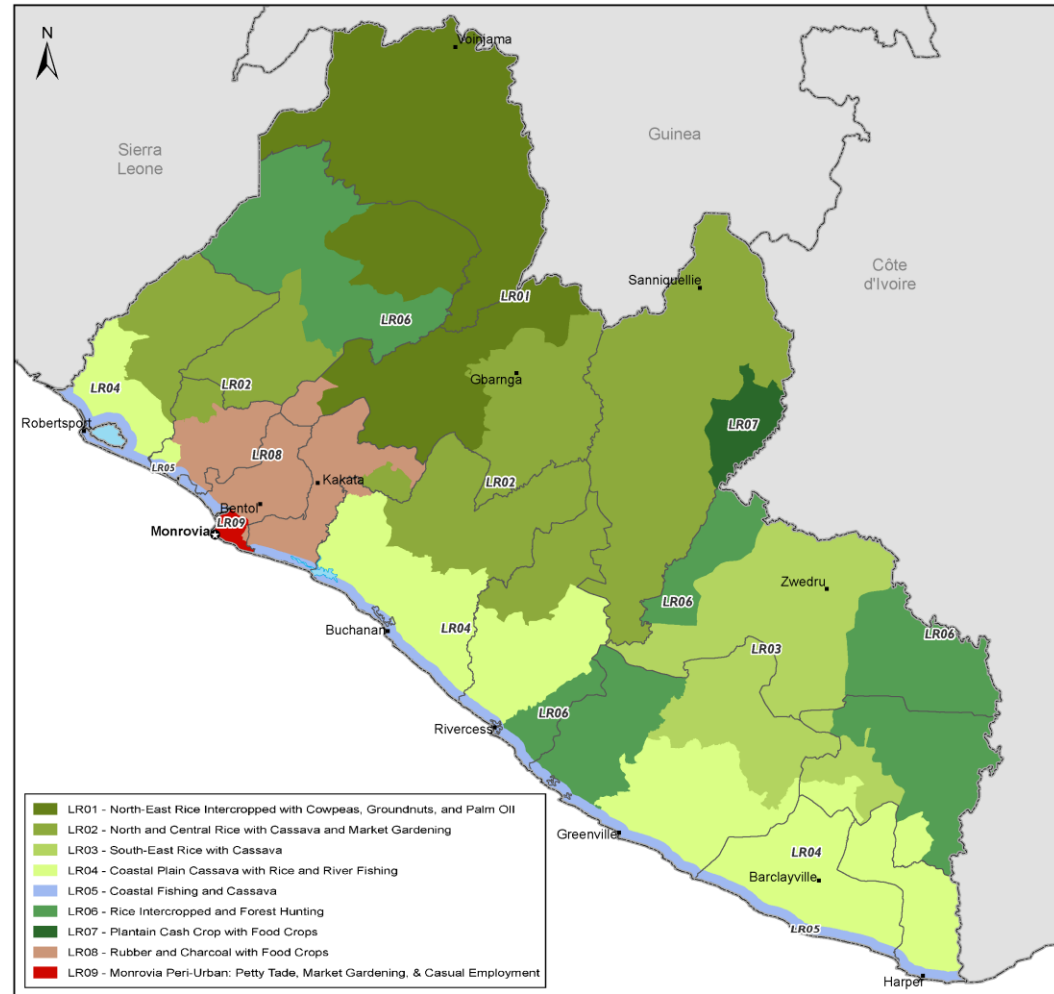
Source: SIPAG



Source: WHO

# Households face below-average incomes

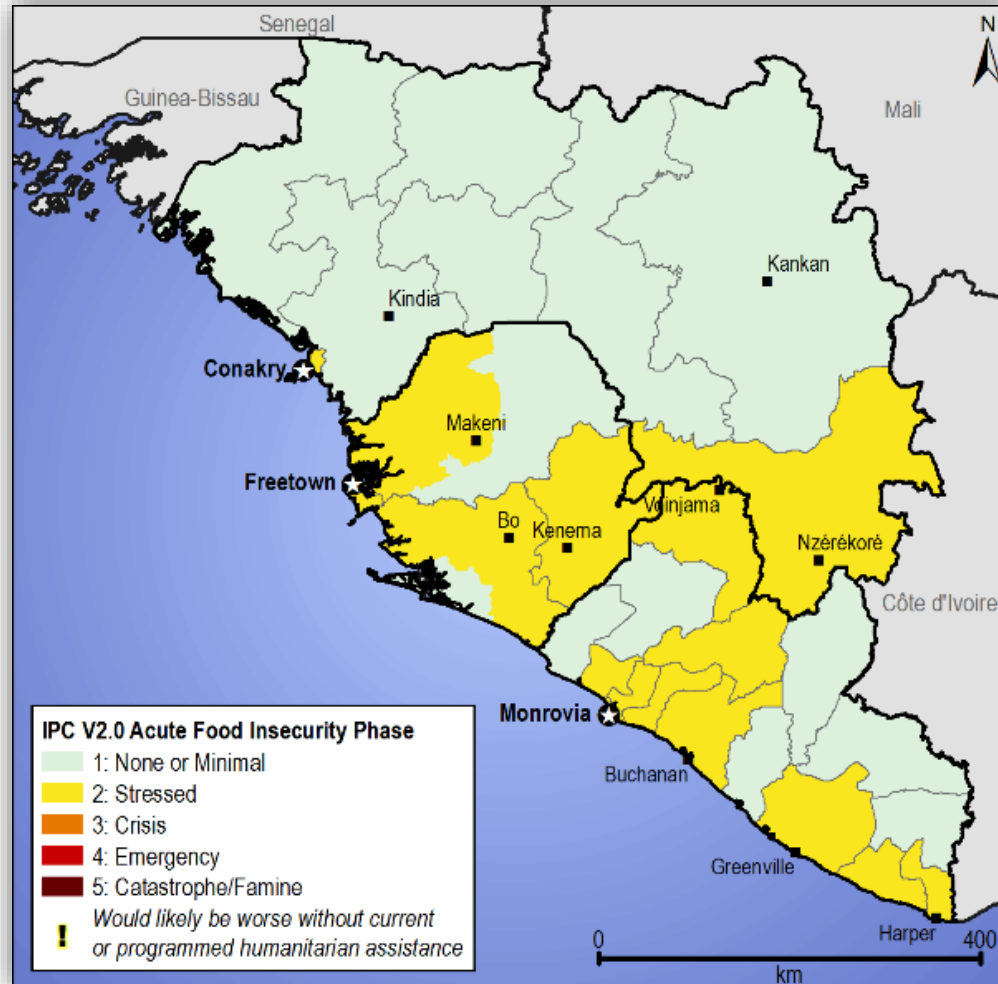
- General economic slowdown
- Disruptions to petty trade and crop sales due to border closures and market disruptions
- Ban on bush meat sales



Updated: December 21, 2010

Source: FEWS NET

# Current food security outcomes, Dec 2014/Jan 2015



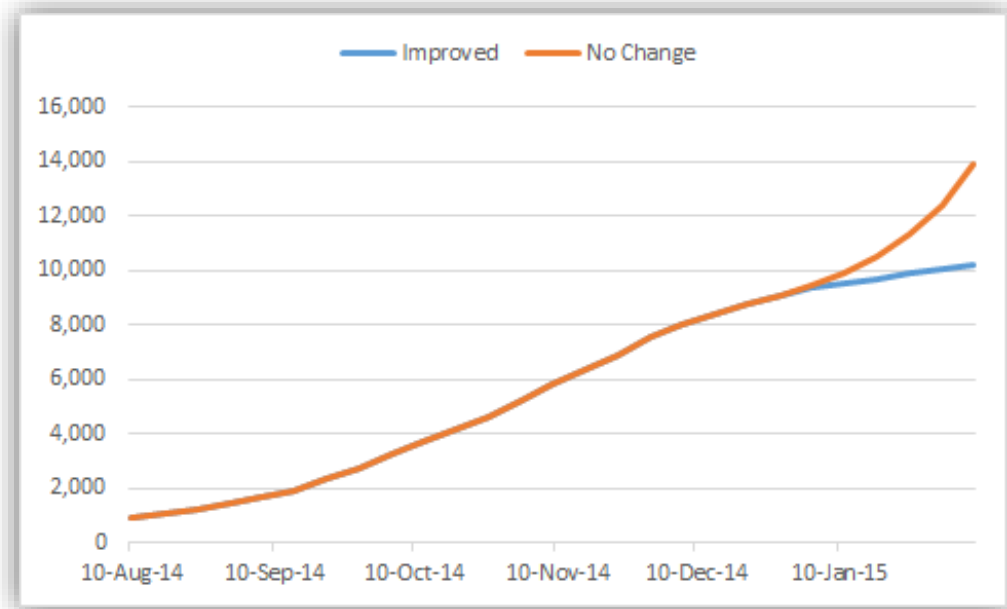
Source: FEWS NET

# **ASSUMPTIONS AND ANALYSIS THROUGH JUNE 2015**

# Assumption: Ebola outbreak continues

- Sierra Leone:
  - Infection rate will be similar to current levels through the first quarter of 2015 before then slowing later in the year
- Guinea and Liberia:
  - Infection rates will be similar to current levels

Projected Ebola cases through Feb. 8<sup>th</sup>, Sierra Leone



Source: Columbia University Prediction of Infectious Diseases

# Assumption: Disruptions to economic activity

- Most markets will remain open but will operate at reduced levels
- Disconnect of rural and urban markets, with most severe impacts in Sierra Leone
- Atypically low cross-border trade
- Relatively normal rice import levels due to continued port functioning
- Imported rice prices will follow seasonal trends. Prices will be similar to or below last year's levels in Guinea and above last year's levels in Liberia and Sierra Leone

# Assumption: Significantly below-average incomes

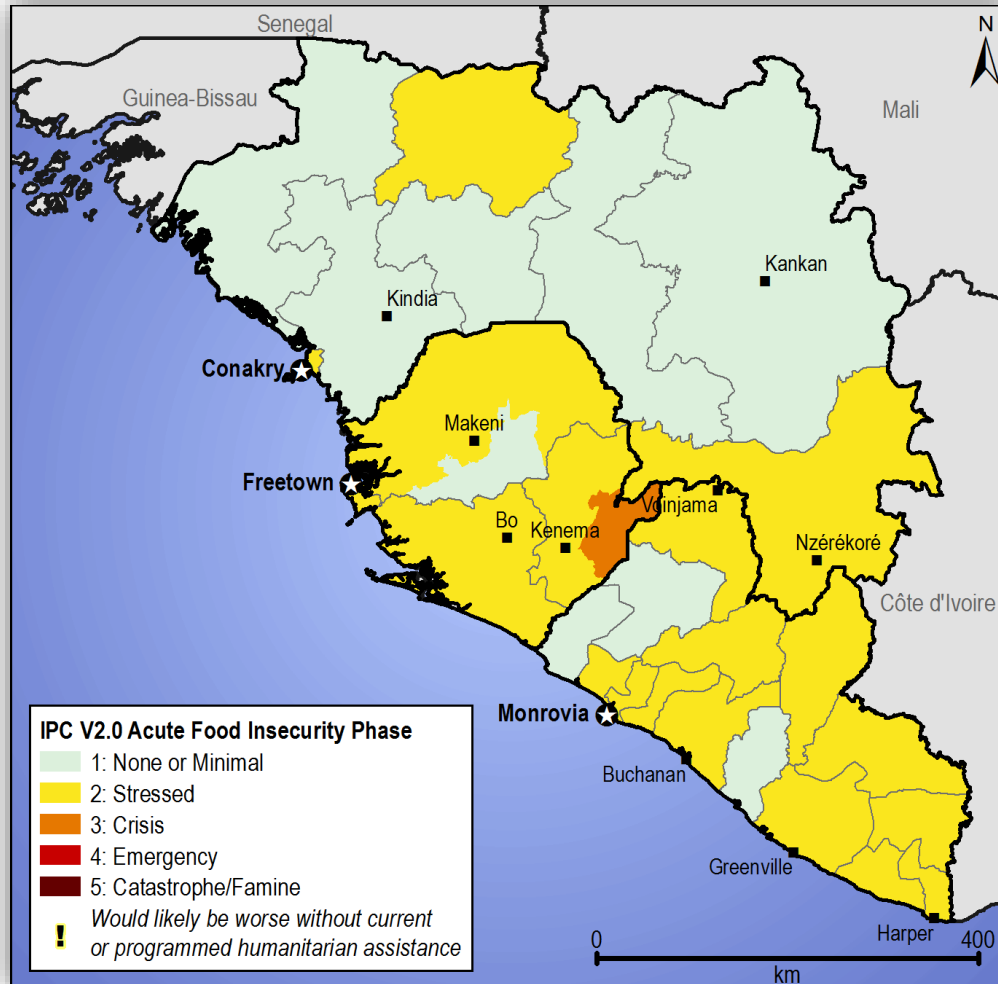
Typical source for poor HHs	Compared to average	Urban/ rural HHs
Crop sales (staples/cash)	▼	Rural
Labor (ag. and non-ag.)	▼	Both
Forestry products	▼	Both
Petty trade	▼	Both
Bush meat	▼	Rural
Livestock	▲	Rural

Incomes compared to average are described as Above (▲), Similar (▶) or Below (▼).

## Other assumptions

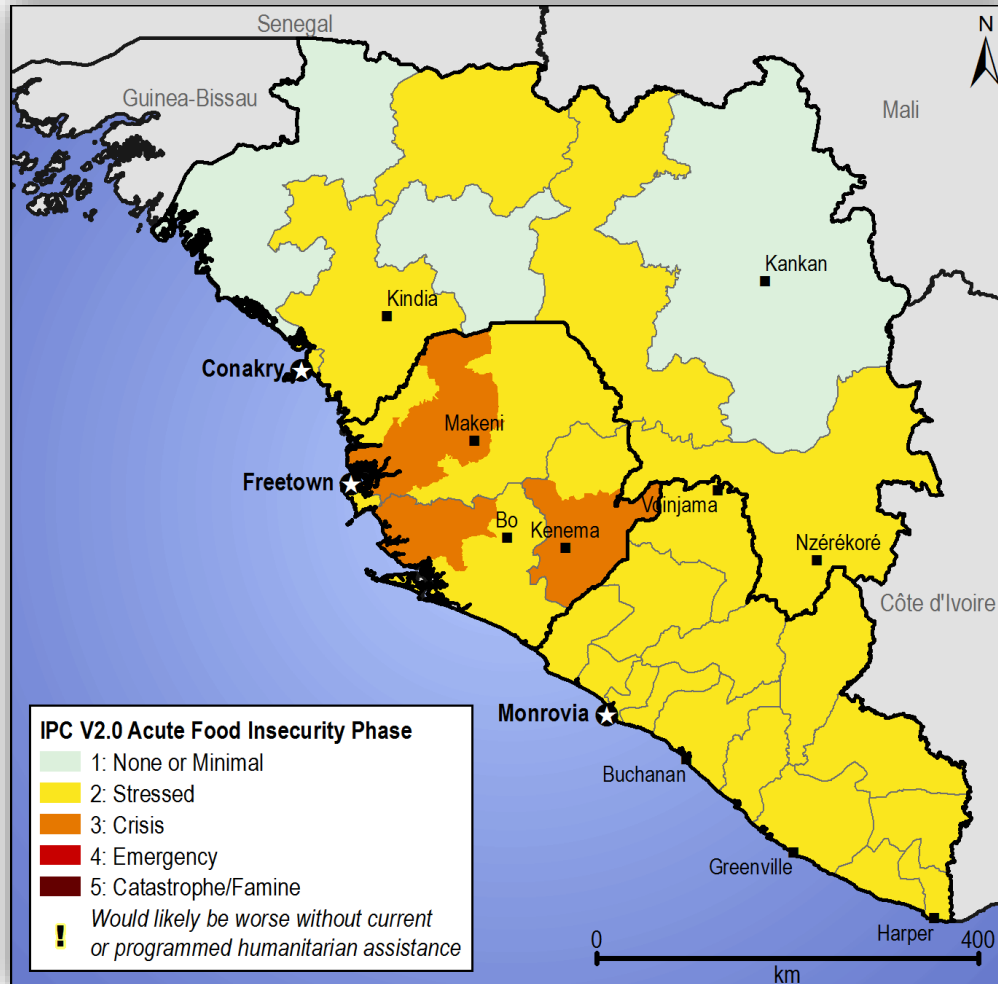
- Household food stocks will deplete one to two months earlier than normal in areas with the most significant crop production losses
- Start of the 2015 rainy season will be normal
- Slight reduction in the area planted during both the off-season and main season in areas worst-affected by Ebola
- Cassava harvests will be average and will continue year-round

# Projected food security outcomes, Jan - Mar 2015



Source: FEWS NET

# Projected food security outcomes, Apr – Jun 2015



Source: FEWS NET

# Events that could change the scenario

- Significant change in Ebola caseload
- Further spread of Ebola to other countries
- Significant change in humanitarian assistance levels
- Significant change in quarantine measures and other restrictions on population movements
- Change in port functioning or rice import levels

# Key messages

- Ebola-related fears and official restrictions on population movements have limited market functioning and typical livelihood activities.
- 2014/15 harvests are expected to be average to slightly below-average.
- As most agricultural households are consuming their recent harvests, food security outcomes are currently most severe amongst households directly impacted by Ebola and poor, non-agricultural households residing in worst-affected zones.
- As households become increasingly market dependent during the first quarter of 2015, atypically poor purchasing power will limit food access. By June 2015, Stressed (IPC Phase 2) and Crisis (IPC Phase 3) food insecurity is expected for poor households across much of the region.

## For more information

**Brenda Lazarus**

Food Security Analyst

[blazarus@fews.net](mailto:blazarus@fews.net)

**FEWS NET Ebola working group**

[fewsnet.ebola@fews.net](mailto:fewsnet.ebola@fews.net)

*To subscribe to FEWS NET's reports, please visit [www.fews.net](http://www.fews.net)*