

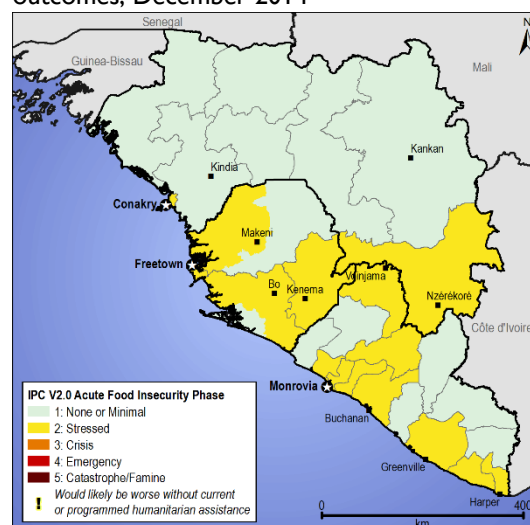
Weak purchasing power and market disruptions reduce food access for poor households

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. The analysis presented in this report is based on various field information from sources including FEWS NET key informants, a recent SMS-based trader survey conducted by FEWS NET and GeoPoll, and partner information.

KEY MESSAGES

- A recent SMS-based trader survey conducted by FEWS NET and GeoPoll in Sierra Leone and Liberia found that over 40 percent of surveyed traders reported reduced market functioning or closed markets in their local communities. Market functioning and trade flows are generally better in Guinea, with the exception of the southern forest zone where the Ebola outbreak has been most intense.
- Certain international borders have recently reopened and restrictions on population movements have been lifted in some zones. However, despite these recent improvements, market disruptions and a general economic slowdown continue to result in below-average household incomes and purchasing power for many households across the three countries.
- According to recently published estimates by WFP and FAO, 2014/15 agricultural production in Guinea, Liberia, and Sierra Leone will be slightly below-average, with the greatest production declines in areas that were early epicenters in the Ebola outbreak, such as Nzérékoré in Guinea, Kailahun in Sierra Leone, and Lofa and Margibi in Liberia.

Figure 1. Most likely estimated food security outcomes, December 2014



Source: FEWS NET

These maps represent relevant *acute* food insecurity outcomes for emergency decision-making. They do not necessarily reflect *chronic* food insecurity. Visit the [IPC page](#) on the FEWS NET website for more information.

- 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. However, 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.

FOOD SECURITY ANALYSIS BY COUNTRY

Guinea

Current situation

Ebola caseload

According to the [World Health Organization \(WHO\)](#), the number of new Ebola cases per week has stabilized to a certain degree with a total of 2,597 confirmed, probable and suspected cases as of December 21, 2014. Over the past 21

days, the largest number of new cases were observed in Conakry, as well as the regions of Kindia, Faranah, Nzérékoré, and Kankan.

Agricultural production

Due to average to above-average rainfall during the 2014 agricultural season, crop development this year has been relatively satisfactory throughout the country. However, in the forest zone, Ebola-related fears reduced the availability of agricultural labor during the typical crop maintenance period, resulting in reduced cereal yields. [According to recent estimates by WFP and FAO](#), 2014 paddy rice production will be approximately 1,976,754 tonnes, down 4 percent nationally compared to 2013 levels (an above-average production year). However, compared to the five-year average, these estimates suggest a 15 percent increase in crop production, according to FEWS NET's calculations. At a sub-national level, the largest production declines compared to 2013 levels were estimated for Nzérékoré (-8 percent) while all other regions were projected to experience only slight decreases in production (0 to -3 percent). Harvests of tubers, fruits, cash crops, and vegetables have reportedly been less affected by Ebola-related fears and are expected to be average or above average in most areas.

Trade flows

While there are no official restrictions on population movements, Ebola-related fears have slowed the internal movement of agricultural commodities between the forest zone, a surplus rice producing area, and the rest of Guinea. With regards to trade with neighboring countries, flows have been reduced due to the official closure of many cross-border points, trader fears, and increased control measures along borders that are currently open (Guinea-Bissau, Cote d'Ivoire, Mali, and Sierra Leone).

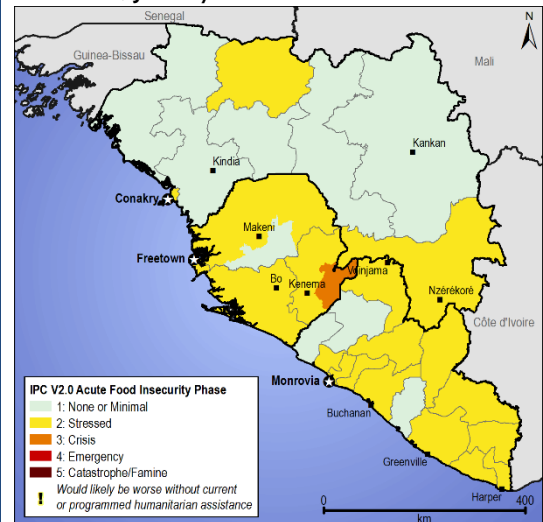
Market functioning

Although there have been a few reports of market closures in the forest zone, weekly and daily markets are generally open across Guinea. Due to ongoing harvests and regular imports from international markets, urban markets are currently well-stocked with local food products, including rice, tubers, and market gardening crops. However, at some local markets, demand has been below average due to the combined effects of low household purchasing power, border closures, and trader fears about frequenting Ebola-affected zones. In Labé, for example, Irish potato producers have been reporting widespread spoilage of their production (in some cases exceeding 50 percent) due to the closure of the Senegalese border and limited storage capacity by small-scale producers. Similar issues have been reported by fruit and tomato producers in Kindia, who typically export to Senegal. To cope, certain producers have increased exports to Conakry although local demand is not sufficient to completely absorb the excess supply, resulting in below-average producer incomes.

Food prices

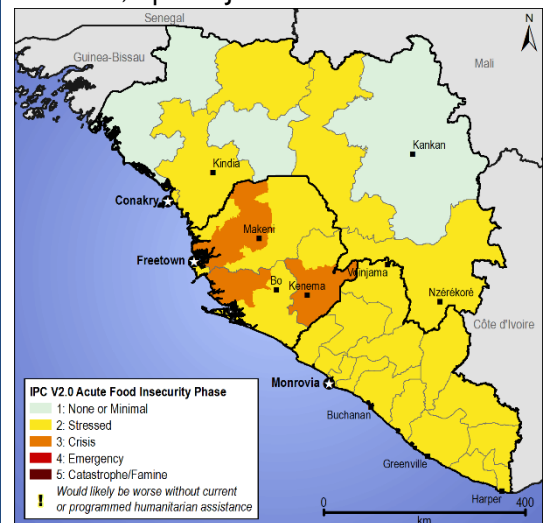
Prices of imported and local rice, as well as other cereals, have been stable or in decline between October and November. In addition, local rice prices are down across all markets by 8 to 20 percent compared to last year's levels while imported rice prices remain relatively stable. The largest declines for local rice prices were observed in Nzérékoré, where November prices declined 12 percent compared to October 2014 levels and 20 percent compared to last year. This can likely be attributed to: 1) excess supply on local markets due to difficulties exporting rice from this surplus-producing zone and 2) atypically low local

Figure 2. Most likely estimated food security outcomes, January to March 2015



Source: FEWS NET

Figure 3. Most likely estimated food security outcomes, April to June 2015



Source: FEWS NET

These maps represent relevant *acute* food insecurity outcomes for emergency decision-making. They do not necessarily reflect *chronic* food insecurity. Visit the [IPC page](#) on the FEWS NET website for more information.

demand caused by poor household purchasing power and food distributions. In Labé, where Irish potato producers are reporting difficulties marketing their crop production, November potato prices were down 19 percent compared to last year's levels. While atypically low prices help facilitate food access for market dependent households, they also contribute to below-average incomes for agricultural households who typically sell crops at this time of the year.

Non-agricultural incomes

In the Nzérékoré region, as well as the southern portion of Farahan, FEWS NET's key informants are reporting that incomes from petty trade and handicraft sales are currently below average due to poor market functioning, border closures, and atypically low demand. In Conakry, meanwhile, the continued closure of schools has led to an unusually large number of school-aged children participating in petty trade activities compared to a normal year.

With regards to animal sales, the sale of bush meat has been banned, significantly reducing household incomes from this source in Nzérékoré. However, livestock traders in this zone are reporting that despite this ban on bush meat, livestock demand has not increased and is currently at below average levels due to poor household purchasing power. In other areas of the country, incomes from livestock and fish sales are relatively average.

Current food security outcomes

Throughout Guinea, most households are currently consuming their own crop production from the ongoing harvest and are facing Minimal (IPC Phase 1) acute food insecurity.

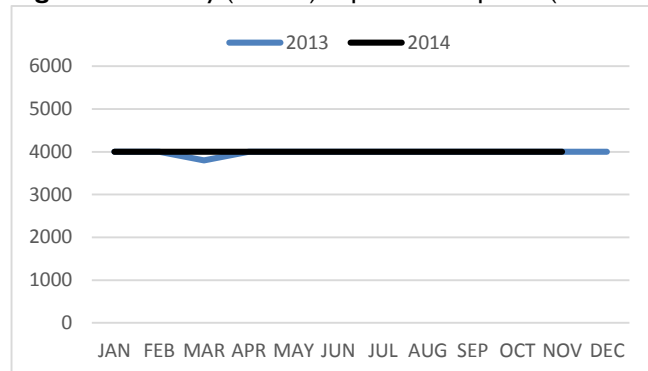
In the regions of Nzérékoré and Conakry, however, many poor households are facing below-average incomes and weaker than usual purchasing power, despite stable or declining food prices. While most of these households are still able to meet their basic food consumption needs, they are having difficulties affording certain essential non-food expenditures and are currently facing Stressed (IPC Phase 2) food insecurity. Within these zones, food access is most constrained amongst households with family members who are ill or have died from Ebola and non-agricultural households reliant on petty trade as a primary income source.

Assumptions

The most likely food security scenario for December 2014 through June 2015 is based on the following assumptions:

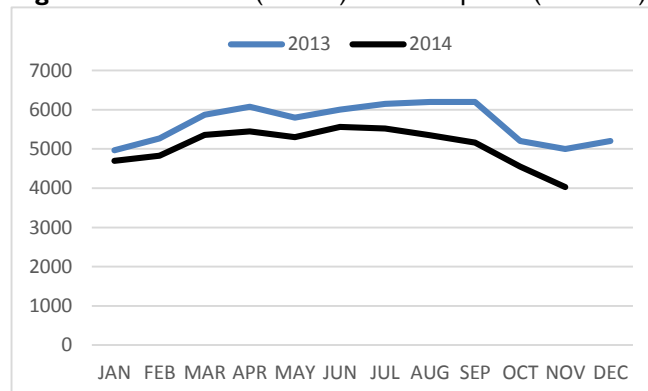
- **Ebola outbreak:** Cases of Ebola will continue to increase throughout the outlook period at a rate that is relatively similar to current levels. The majority of cases will be observed in the forest zone and in Conakry, although there will also be low levels of cases in other regions.
- **Household food stocks:** Due to a relatively average main harvest, food stocks for poor households in most areas of the country will last three to six months, similar to a normal year. In Nzérékoré, where crop production was estimated to be down 8 percent compared to 2013 levels, household food stocks will still likely last a typical four to six months, as households consume a larger proportion of their production than normal due to difficulties marketing their crops. However, within this zone, there will be pockets of households with below-average food stocks, particularly in areas worst-affected by the Ebola outbreak and amongst households directly impacted by the disease.

Figure 4. Conakry (Guinea) imported rice prices (GNF/KG)



Source: SIPAG

Figure 5. Nzérékoré (Guinea) local rice prices (GNF/KG)



Source: SIPAG

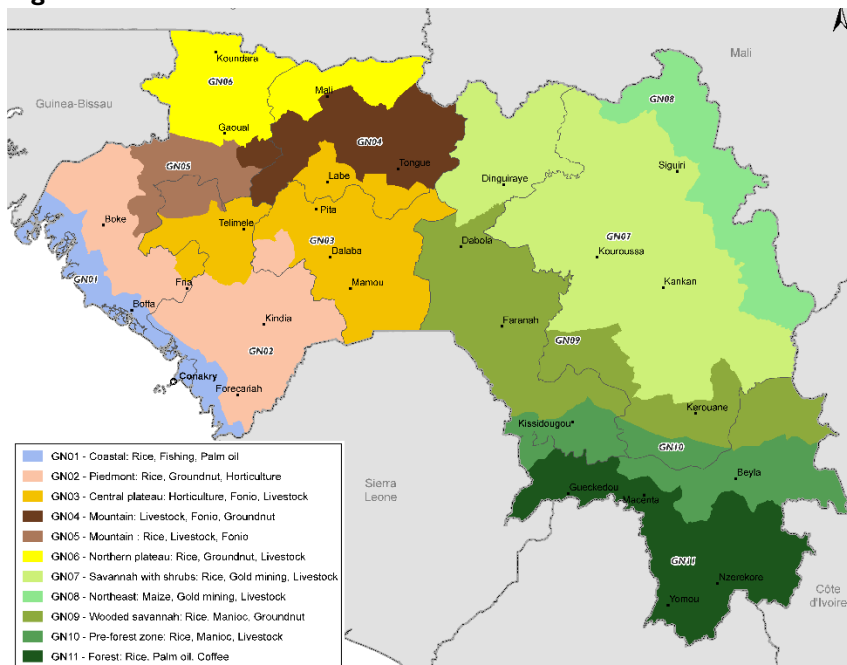
- **Trade flows and market functioning:**

While most internal trade flows will continue at relatively normal levels, flows will be limited to and from the forest zone due to Ebola-related fears. This will lead to above-average market supplies of cereals and other products in the Nzérékoré region. Although additional cross-border points will likely open during the outlook period, regional demand from neighboring countries for Guinean products will continue to be reduced due to traders' reluctance to travel to Ebola-affected countries. This will result in continued marketing difficulties for potato producers in Labé and Mamou and for fruit and tomato producers in Kindia. Domestically, demand for locally produced food commodities will also continue to

be slightly below average due to low purchasing power and the closure of some agricultural and mining industries that normal purchase commodities directly from producers. Rice imports from international markets will continue at relatively normal levels.

- **Food prices:** Due to normal import levels, stable prices on international markets, and relatively normal internal trade flows, prices for imported rice are expected to remain stable throughout the country. In addition, prices for local rice and other staple foods will follow normal seasonal trends, increasing as food supplies deplete in 2015. However, prices at most markets are expected to remain similar to or below last year's levels. Due to difficulties transporting local rice from Nzérékoré to other regions, prices in this zone will remain well below last year's levels.
- **Off-season vegetable production:** For producers who normally export to Senegal, off-season production of vegetables will likely be below average as farmers become discouraged due to difficulties marketing their current crops. These difficulties will also contribute to below-average cash availability for agricultural inputs. As sales to date have not enabled many farmers to cover their production costs, vegetable farmers will carry above-average debt levels during the outlook period.
- **Household incomes:** Due to a continued economic slowdown, border closures, and market disruptions, poor households in the forest zone will continue to face below-average incomes from typical sources (ex. petty trade, labor, bush meat sales, mining, and forest product sales). For agricultural households, incomes from crop sales will be average in most areas with the exception of households in the forest zone and those in Kindia, Labé, and Mamou who typically export their products to Senegal.
- **2015 rainy season:** Forecasts from major meteorological centers ([IRI](#), [CPC](#), [ECMWF](#)) are indicating no major anomalies between January and June 2015. Therefore, FEWS NET is assuming that rainfall during the 2015 rainy season will be average, with an on-time start to the main season in February/March in Nzérékoré and May/June in northern areas.
- **2015 main agricultural season:** Given the assumption of a normal start to the rainy season, land preparation activities will occur on-time between February and June, depending on the zone. However, households who had below-average crop sales incomes this year, particularly in Nzérékoré, Labé, Kindia, and Mamou, may slightly reduce the area that they plant next year due to limited access to agricultural inputs resulting from difficult access to cash and increased debt levels.

Figure 6. Livelihood zones in Guinea



Source: FEWS NET

Projected outcomes

Due to relatively normal harvests, food stocks, and incomes from agricultural activities, poor rural households in most areas will face normal food access between December 2014 and June 2015 and will be in Minimal (IPC Phase 1) acute food insecurity.

However, Ebola-related disruptions to markets and income-generating activities are expected to be more severe in the region of Nzérékoré during the next six months. This will cause poor non-agricultural households to face a significant decline in incomes from typical sources (petty trade, labor, etc.). In addition, poor agricultural households will face below-average crop incomes due to difficulties exporting their products to other regions of Guinea and to neighboring countries. While they are expected to be able to minimally meet food needs, poor households will have difficulties meeting their non-food expenditures between December 2014 and June 2015. Also, in the Kissidougou Prefecture of Farahan, many households will face similar shocks to household incomes and purchasing power, contributing to Stress (IPC Phase 2) food insecurity by April 2015.

In Kindia and Labé, poor households generally earn a significant amount of income from the sale of cash crops (potatoes, tomatoes, and fruits) to Senegal. However, difficulties marketing their products due to the border closure and low demand from Senegal has led to a significant decline in household incomes and an increase in debt levels. While these households are currently relying on their own crop production to meet household food needs, food access will likely become more difficult between January and June, depending on the zone, once household food stocks deplete. Poor households in Labé will begin to face Stressed (IPC Phase 2) food insecurity starting in January while those in Kindia, where trade opportunities with Conakry are better, will decline into Stress (IPC Phase 2) slightly later but by April 2015.

Finally in Conakry, a general economic slowdown will cause poor households' incomes from typical sources (petty trade, transportation, food service, etc.) to decline atypically, limiting food access through market purchase and resulting in a continuation of Stressed (IPC Phase 2) food security outcomes through June 2015.

Sierra Leone

Current situation

Ebola caseload

According to the [World Health Organization \(WHO\)](#), there has been a total of 9,004 confirmed, probable, and suspected cases of Ebola in Sierra Leone as of December 21. Recently, the number of new cases appears to have slowed although a large number of cases have recently been observed in the districts of Kono, Bo, Tonkolili, Bombali, Port Loko, Kambia, and the Urban and Rural Western Areas.

Agricultural production

[According to estimates by WFP and FAO](#), national 2014/15 rice production will likely be 1,155,114 tonnes, down 8 percent compared to 2013 levels (a record production year), due to labor constraints caused by Ebola-related fears and official restrictions on population movements. According to FEWS NET's calculations, this production estimate would suggest a 7 percent increase in rice production compared to the five-year average. Cassava, which is less labor intensive than other crops, has been less affected by the outbreak with national production down 3 percent compared to 2013 levels.

At a sub-national level, WFP and FAO estimates indicate that Kailahun, an early epicenter in the Ebola outbreak, will experience the sharpest production declines with rice and cassava production down 17 percent and 6 percent, respectively, compared to 2013 levels. Meanwhile, FEWS NET's key informants report that harvests will be slightly to moderately above average in Kono, Tonkolili, and Koinadugu, three areas with fewer Ebola cases earlier in the cropping season. However, in both Bonthe and Pujehun, two other areas less impacted by Ebola earlier in the year, production is still estimated to be slightly below average due to flooding in these districts.

Market functioning

Ebola-related fears have significantly disrupted trade flows across Sierra Leone. During the month of December, the districts of Kono and Tonkolili were placed under two week quarantines, adding to the growing list of quarantined districts within the country, including Kailahun, Kenema, Port Loko, Bombali, and Moyamba. In other areas, roadblocks and chiefdom-level quarantines are also restricting population movements. While trucks carrying food have been allowed to enter quarantined zones with the proper government paperwork, these quarantines have increased transportation costs and slowed the movement of goods. With regards to cross-border trade, the border with Guinea has recently opened, although trade flows continue to be at reduced levels. All cross-border points with Liberia are still closed.

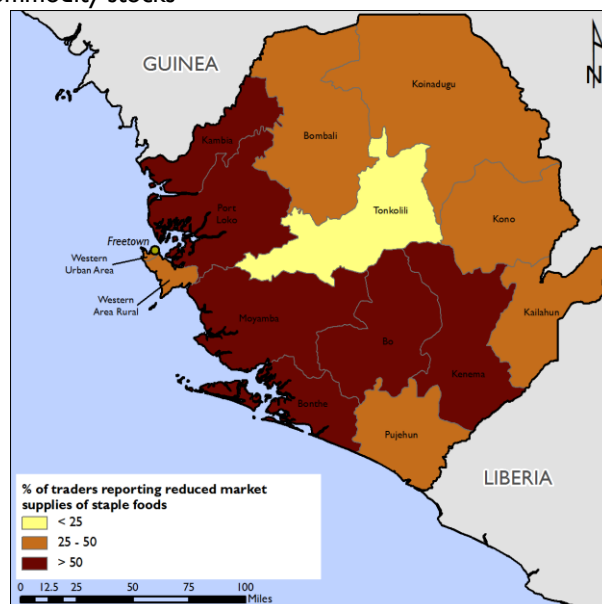
With regards to market functioning, only 8 to 9 percent of traders [surveyed by FEWS NET using a SMS-based GeoPoll survey in mid-November](#) reported that local markets (daily or weekly) were closed, despite an official ban by the government on weekly markets. In addition, another 44 to 45 percent of surveyed traders reported that markets in their communities were open but operating at reduced levels. The highest rates of traders reporting reduced weekly market functioning were observed in the districts of Bombali, Kailahun, Kambia, Kono, Moyamba, Pujehun, and Tonkolili.

Market supply levels and food availability

FEWS NET's recent trader survey also found that over 50 percent of traders in Bo, Bonthe, Kambia, Kenema, Moyamba, and Port Loko reported that their food stocks were currently at below-average levels, most often due to movement restrictions and high transport costs. Meanwhile, the lowest percentage of traders reporting below-average stocks was observed in Tonkolili (6 percent). Key informant reports indicate that Tonkolili is generally less dependent on trade flows from neighboring districts and had a relatively average harvest, which may explain the district's better supply levels.

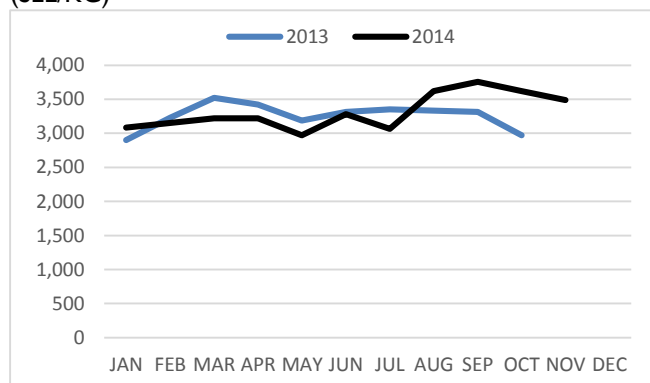
When asked about local food availability, 47 percent of surveyed traders reported that available food would be inadequate to meet the needs of local consumers. The highest percentage of traders reporting poor food availability (over 50 percent) was observed in Bo, Kenema, Kono, Moyamba, Port Loko, and Pujehun while the lowest percentage was in Kailahun (27 percent). The results of the survey indicated no clear relationship between reported stocks levels/food availability and quarantined areas.

Figure 7. Percentage of traders reporting lower than usual commodity stocks



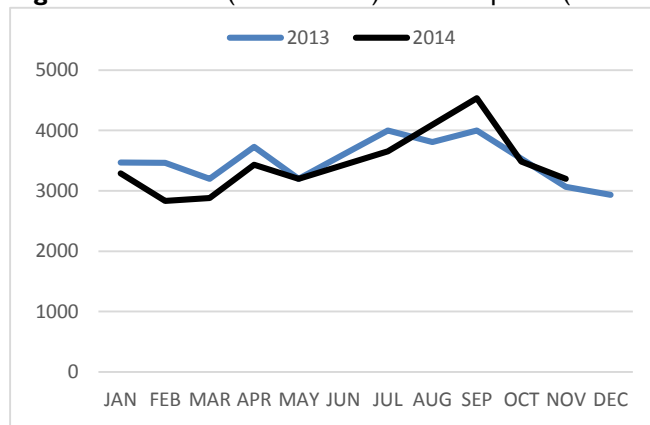
Source: FEWS NET

Figure 8. Kailahun (Sierra Leone) imported rice prices (SLL/KG)



Source: Ministry of Agriculture Forestry & Food Security

Figure 9. Tonkolili (Sierra Leone) local rice prices (SLL/KG)



Source: Ministry of Agriculture Forestry & Food Security

Food prices

Due to the ongoing harvests, November food prices for most commodities declined seasonally compared to October levels. Exceptions to this include imported rice in Kenema where prices increased 8 percent. Historical time series data is limited but for markets where November 2013 price data is available, imported rice prices are generally similar or above last year's levels. However, for local rice and cassava, price trends are variable with prices below last year's levels in Pujehun and Port Loko but well above in Freetown. According to key informant information, supply routes into Freetown have been significantly disrupted due to roadblocks and checkpoints, which may be contributing to higher prices for locally produced commodities in the capital city.

Household incomes

According to key informant information, incomes from a variety of sources are down this year due to the economic impacts of the Ebola outbreak. For agricultural households, slightly to moderately below-average harvests and the closure of local weekly markets where households normally sell their crops have reduced crop sales and related household incomes. Border closures, restrictions on population movements, and increased transportation costs have also reduced petty trade and opportunities to sell cash crops (ex. market gardening crops and palm oil). With regards to animal sales, a ban on bush meat sales has reduced incomes for those who normally sell this product. Meanwhile for small ruminants and poultry, the impact of the Ebola outbreak is varied, with reduced sales in some areas due to market disruptions but increased sales and prices in other areas due to stronger demand caused by the bush meat ban. In several areas of the country, charcoal production has reportedly intensified to help offset the effects of below-average incomes from other sources. However, producer prices for this product vary throughout the country, with normal or slightly below-average prices in most areas, but atypically high prices in certain zones where humanitarian organizations have been making charcoal purchases for humanitarian distributions.

Current food security outcomes

In many areas of Sierra Leone, households have been unable to earn typical levels of income through crop sales and non-agricultural activities. This, along with reduced market functioning, market closures, and quarantine measures have limited food availability and access in some communities. Although very poor and poor households in much of the country are still able to minimally meet food needs through ongoing harvests, they are unable to cover essential non-food expenditures and are currently Stressed (IPC Phase 2). Meanwhile, in Koinadugu, Tonkolili, and Bonthe, areas with a higher proportion of rural, agricultural households, food security conditions have been more favorable due to reduced impacts of the Ebola outbreak on crop production and a lower dependence on internal and cross-border trade for food supplies. In these areas, most households are currently minimally meeting both food and nonfood needs and are facing Minimal (IPC Phase 1) food insecurity.

Assumptions

The most likely food security scenario for December 2014 through June 2015 is based on the following assumptions:

- **Ebola outbreak:** The number of new Ebola cases will continue to grow substantially through the first quarter of 2015 at a rate that is relatively similar to current levels, before then slowing later in the year. There will be a relatively large number of new cases in Freetown and a more even distribution of cases throughout the rest of the country.
- **2014 cropping activities:** The ongoing rice harvests will continue through January, but at slightly reduced levels in areas worst-affected by the Ebola outbreak due to labor constraints. Off-season agricultural production is also expected to be slightly below average due to limited labor and a lack of agricultural inputs.
- **Household food stocks:** The duration of household food stocks this year will vary depending on the zone. In areas where labor constraints had the most significant impact on crop production, such as Kailahun, food stocks will deplete one to two months earlier than normal. However, in other areas where production was less impacted (ex. Kono, Tonkolili and Koinadugu), the duration of household food stocks will be similar to a normal year. Households with family members who have died or been ill with Ebola will also likely have lower than usual stocks resulting from the effects of quarantines and the loss of productive family members due to the illness and caregiving responsibilities.
- **Household incomes:** Most households will face below-average incomes from typical sources (cash crops, petty trade, labor, bush meat sales, mining, forest product sales, etc.) during the outlook period due to an unfavorable economic environment.

- **Trade flows:** Internal trade flows will continue to be limited due to Ebola-related fears, particularly in quarantined areas and those worst-affected by the Ebola outbreak. With regards to cross-border trade, some border crossings will open during the outlook period and will favor exchanges between Sierra Leone and neighboring countries compared to December levels, although exchanges will remain below average.
- **Market functioning:** Most markets will remain open during the entire outlook period, operating at reduced levels. However, limited market supply and elevated levels of market demand for rice will begin to be observed in January, slightly earlier than normal, in areas worst-affected by Ebola due to the effects of this year's below-average production. In addition, demand for cassava will be atypically high starting in April as poor households substitute towards this product due to low rice stocks and weak household purchasing power.
- **Food prices:** Between December and January, prices will remain relatively stable or in decline, particularly in the main agricultural production areas. Starting in February, prices will begin to rise seasonally and will evolve to above average levels between April and June due to atypically strong demand and low food stock levels. Due to transportation disruptions, price increases compared to average will be greatest for locally produced products (rice and cassava) in urban centers, such as Freetown. Meanwhile for imported rice, the largest increases will be observed in isolated rural areas far from the port city of Freetown.
- **2015 rainfall:** Forecasts from major meteorological centers ([IRI](#), [CPC](#), [ECMWF](#)) are indicating no major anomalies between January and June 2015. As a result, FEWS NET is assuming that rainfall will be relatively normal, with low levels of precipitation between January and March and increased levels between April and June.

Projected outcomes

Due to atypically low incomes resulting from below-average production and the closure of some weekly and cross-border markets, poor households in many areas of the country will face Stressed (IPC Phase 2) food security outcomes during the outlook period. More specifically, they will be unable to cover their essential non-food expenditures due to low purchasing power and a lack of adequate food access and availability. In areas where disruptions to agricultural production and market activities have been most severe, such as Kailahun, Kenema, Bombali, Port Loko, and Moyamba, poor households will likely face small to moderate food consumption gaps, equivalent to Crisis (IPC Phase 3) between January and June.

Meanwhile in Tonkolili, food security conditions are more favorable due to an average rice production and low dependence on internal or cross-border trade for food supplies at this time of the year. In this district, households will face normal food access and Minimal (IPC Phase 1) acute food insecurity between December 2014 and March 2015 before declining into Stress (IPC Phase 2) between April and June.

Liberia

Current situation

Ebola caseload

According to the [World Health Organization \(WHO\)](#), there has been a total of 7,862 confirmed, probable, and suspected cases of Ebola in Liberia as of December 20. Over the past 21 days, the largest number of new cases were observed in Monrovia, as well as the counties of Grand Bassa, Bong, and Grand Cape Mount.

Agricultural production

Farmers in areas worst affected by the Ebola outbreak (ex. Lofa, Bong, Nimba, Margibi, and Bomi counties) report that due to labor constraints during the typical crop maintenance and weeding periods, crop yields will likely be reduced this year. According to a recent FAO/WFP crop and food security assessment, 2014 rice production is estimated to be 262,570 tonnes, which represents a decline in production of 12 percent compared to 2012 levels (an above-average production year). According to FEWS NET's calculations, this estimate represents a three percent decline in production compared to last year's levels (a slightly below-average year) and 10 percent decline compared to the five -year average. At a sub-national level, the most significant declines in production compared to 2012 levels were observed in the counties of Lofa (-20 percent), Margibi (-20 percent), Montserrado (-17 percent), Bong (-13 percent), and Bomi (-12 percent). Meanwhile, in other areas of the country, favorable weather conditions and a normal progression of the agricultural season are expected to lead to generally average to slightly below-average harvests, although in southeastern Liberia (Grand Kru and Maryland) farmers report that

flood-related damages negatively impacted crop production this year. Cassava production is generally less labor intensive and was therefore less impacted by the Ebola-related labor constraints compared to rice. According to WFP and FAO estimates, cassava production at a national level will be down 5 percent compared to 2012 levels.

Market functioning

In mid-November, [FEWS NET conducted an SMS-based, GeoPoll trader survey in Liberia](#) to better understand local market functioning within the country. The results of this survey indicate that roughly 4-7 percent of surveyed traders reported that local markets (daily or weekly) were closed while an additional 36-37 percent reported that these markets were open but functioning at reduced levels. The highest rates of traders reporting reduced market functioning were observed in Bong, Lofa, Margibi, Montserrado, and Nimba counties.

Market supply levels and food availability

The port of Monrovia remains open, enabling the continuation of rice imports from international markets, although the depreciation of the Liberian dollar compared to the US dollar between June and July of this year made imports of local rice more expensive. With regards to local market supplies, the results of the recent FEWS NET/GeoPoll SMS-based survey found that in mid-November, over 40 percent of surveyed traders in Bong, Gbarpolu, Grand Kru, Lofa, Montserrado, and Nimba reported that their stocks were currently at below-average levels. These traders most frequently attributed their below-average stocks to low demand, high transport costs, and local travel restrictions. Meanwhile, the lowest rates of traders reporting below-average stock levels were observed in Bomi, Grand Bassa, River Cess, River Gee, and Sinoe counties. When asked about local food availability, 38 percent of all surveyed traders reported that they believed local food availability was inadequate to meet the needs of local consumers, with the highest rates of traders reporting inadequate supply in Bomi (40 percent), Bong (43 percent), Margibi (41 percent), Montserrado (41 percent), and Sinoe (100 percent) counties.

Prices

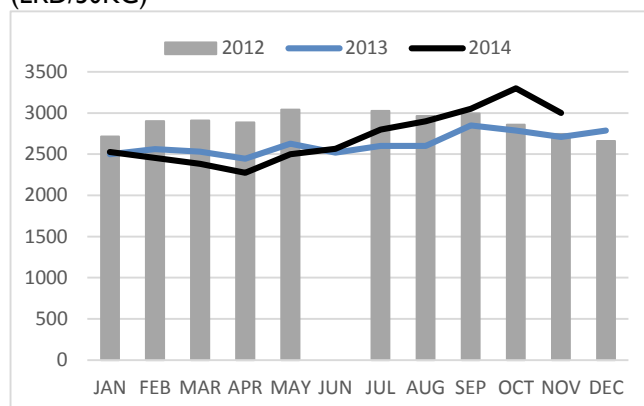
November imported rice prices in Liberia were generally stable compared to October prices, with the exception of Monrovia (-9 percent) and Zwedru (+6 percent). However, compared to last year's levels, imported rice prices have increased across the country, ranging from 11 percent in Monrovia to 36 percent in Pleebo. While reduced domestic market and trade functioning may have contributed to these price increases, the lagged

Figure 10. Percentage of traders reporting lower than usual commodity stocks



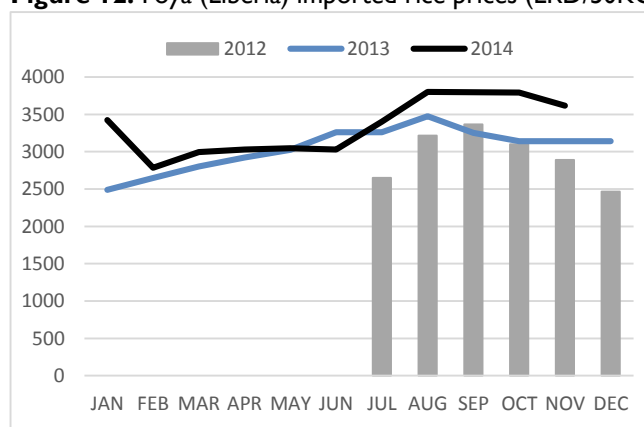
Source: FEWS NET

Figure 11. Monrovia (Liberia) imported rice prices (LRD/50KG)



Source: WFP

Figure 12. Foya (Liberia) imported rice prices (LRD/50KG)



Source: WFP

effect of the depreciation of the Liberian dollar also likely played a role. With regards to cassava, November prices fell sharply in most areas (6 to 28 percent) other than in two deficit producing areas (Monrovia and Zwedru), where prices were stable. Compared to last year's levels, cassava prices varied, with prices below last year's levels in Zwedru (-11 percent), stable in Pleebo and Voinjama, and up 33 percent in Monrovia.

Household incomes

Due to a general economic slowdown, household incomes from all sectors of the economy have fallen to below average levels. For agricultural households, a reduction in market functioning, border closures, and increased transportation costs have made it more difficult for households to sell their staple (rice and cassava), and cash (cocoa, palm oil, vegetables) crops. In addition, households in southern portions of the country typically hunt bush meat to sell to other areas of Liberia, as well as Cote d'Ivoire, but are unable to do so this year due to a ban on bush meat sales. While this has had a negative impact on poor household incomes from this source, it has also resulted in increased demand and prices for livestock animals. With regards to incomes for non-agricultural households, [a recent survey by the World Bank, Gallup, and Liberia Institute of Statistics](#) found that roughly half of urban respondents who had been working earlier in the year during the 2014 Household Income and Expenditure Survey (HIES) reported that they were no longer employed in October and November 2014.

Current food security outcomes

Currently, most agricultural households in Liberia are relying on their own crop production to meet essential food needs. However, in Bomi, Bong, Grand Bassa, Lofa, Margibi, and Montserrado counties, market and trade disruptions, as well as a general economic slowdown, has significantly reduced the ability of households, particularly those not active in the agricultural production, to afford essential nonfood expenditures. As a result, these households are currently Stressed (IPC Phase 2). Meanwhile, in southeastern Liberia (Grand Kru, Maryland, and Sinoe), market and trade flow disruptions, particularly relating to the closure of the border with Cote d'Ivoire, have reduced purchasing power and food access for poor, non-agricultural households and are also contributing to Stressed (IPC Phase 2) outcomes.

In the rest of the country, households are currently meeting their basic food and nonfood needs and are facing Minimal (IPC Phase 1) food insecurity.

Assumptions

The most likely food security scenario for December 2014 through June 2015 is based on the following assumptions:

- **Ebola outbreak:** The number of new Ebola cases in Liberia will continue to increase throughout the outlook period at a rate that is relatively similar to current levels. The majority of cases will be observed in Monrovia, although there will also be low levels of cases in other regions of the country.
- **Household food stocks:** In areas worst-affected by Ebola early in the outbreak, including Lofa and Margibi counties, household food stocks will last roughly four months, or one month shorter than normal, due to below-average crop production. In other areas, food stocks will not deplete significantly earlier than normal this year. Harvests of cassava will continue at relatively normal levels during the entire outlook period.
- **Market functioning:** With the exception of a few weekly markets, particularly in rural areas worst-affected by the Ebola outbreak, most markets will remain open during the outlook period. However, market operations will be at reduced levels due to the effects of Ebola-related fears. As a result, agricultural households will have more difficulties than usual marketing both staple and cash crops, resulting in reduced household incomes.
- **Trade flows:** Food will continue to flow internally between zones, particularly as most official movement restrictions have now been lifted. However, continued trader fears will increase transportation and transaction costs. With regards to cross-border trade, official crossing points with neighboring countries will remain closed and will significantly reduce exports, such as palm oil towards Guinea or bush meat and fish towards Cote d'Ivoire, compared to normal levels. However, informal trade away from major crossing points will continue at low levels.
- **Food prices:** Between December and January, prices will remain relatively stable or in decline, particularly in the main agricultural production areas. Then, starting in February, prices will begin to rise seasonally due to strong demand and low food stock levels. Rice prices are expected to remain above last year's levels during the entire outlook period.
- **Bush meat:** In rural areas, households will continue to hunt and consume bush meat at low levels. However, bans on the sale of bush meat will reduce household incomes for those who typically sell these products, particularly in Grand Gedeh,

River Gee, and Sinoe counties. In addition, demand for substitute products, such as livestock, poultry, and fish, will increase, leading to higher prices and positive incomes for livestock-raising households.

- **Palm oil:** Production will peak between January and June, depending on the area, although households will face slightly reduced incomes from the sale of this product due to market and trade disruptions.
- **2015 rainfall:** Forecasts from major meteorological centers ([IRI](#), [CPC](#), [ECMWF](#)) are indicating no major anomalies between January and June 2015. As a result, FEWS NET is assuming that rainfall will be relatively normal, with low levels of precipitation between January and March, and then increased levels between April and June.
- **2015 agricultural production:** Land preparation activities will begin between January and April, followed by planting activities between April and June. However, access to inputs, seeds, and agricultural credit might be below-average, due to reduced household incomes and market disruptions, leading to a slight decline in the area planted compared to normal. These activities will provide agricultural labor work opportunities for poor households at relatively average to slightly below-average levels. Wages for these activities will be similar to previous years.

Projected outcomes

As household food stocks in most areas of the country are relatively similar to a normal year, poor households in agricultural areas will rely on their own crop production to meet food needs in the short-term. However, market and trade disruptions, as well as a general economic slowdown, will reduce the ability of certain households, particularly market-dependent, non-agricultural households, to afford essential nonfood expenditures in Bomi, Bong, Grand Bassa, Grand Kru, Lofa, Margibi, Maryland, Montserrado, and Sinoe counties. Between January and March, areas worst affected by the poor agricultural production and market disruptions will face the highest levels of food insecurity, although as the year progresses, Stressed (IPC Phase 2) food security outcomes are expected across the country.