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SYNTHESIS

FAO/WFP CROP AND FOOD SECURITY ASSESSMENT – LIBERIA, SIERRA LEONE AND GUINEA

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Highlights

- Rice production is estimated to decline by 12 percent, 8 percent and 3.7 percent in Liberia, Sierra Leone and Guinea, respectively.
- The sub-national level impact on production is much higher (up to 20 percent) in the areas hit hardest by the disease.
- The general decline in economic activity has severely affected households' wages and incomes.
- The number of food insecure individuals due to Ebola is estimated in hundreds of thousands in each country and is expected to rise in 2015.
- The loss of livelihoods coupled with market uncertainties call for flexibility and care in the type and scale of interventions mainly in food and agriculture assistance.

The Ebola Virus Disease (EVD) outbreak continues to adversely impact the agricultural sector and food security conditions of **Guinea, Liberia and Sierra Leone**. The outbreak which started in **Guinea**, escalated the fastest in **Liberia** and led to a sharp disruption of economic activities, mainly based on changes of behaviour due to fear. Furthermore, in **Sierra Leone** it led to the quarantining of the most affected districts, restrictions of internal population movement, as well as closure of markets.

In 2014, foreign direct investments slowed down due to the Ebola outbreak and the GDP is expected to suffer. The World Bank¹ has estimated the growth rate to drop from 5.9 percent to 2.2 percent in Liberia; 11.3 percent to 4 percent in Sierra Leone; and 4.5 percent to 0.5 percent in Guinea.

	GDP Growth Without EVD (%)	GDP Growth with EVD (%)
Liberia	5.9	2.2
Sierra Leone	11.3	4.0
Guinea	4.5	0.5

Source: World Bank.

¹ World Bank: Update on the Economic impact of the Ebola

In **Liberia**, prior to EVD, the share of agriculture in GDP has been steadily falling at high rates from 58-39 percent between 2009 and 2012. Furthermore, the annual growth of agriculture has been falling significantly i.e. 14 to 4 percent, respectively. In **Sierra Leone**, agriculture remains prominent but has also been gradually declining from 58 percent in 2009 to a forecast level of 50 percent in 2014. Furthermore, the annual growth of agriculture has remained at about 4 to 5 percent. In **Guinea**, the share of agriculture sector has been steadily declining from 26 percent in 2009 to 20 percent in 2013, with an average of about 22 percent. In all three countries, large segments of the population depend on agriculture as their primary source of livelihood and income. However, agricultural productivity has remained low. Poor roads, water and electricity supply hinder both storage and transportation of foods to markets; as a result, most agricultural production is for direct consumption.

Impact on Production

Agricultural production has been affected by EVD in all 3 countries. In **Liberia**, the production of the main staple crop, rice, would be lower by 12 percent. The sub-national level impact is even much higher in the counties hit hard by the disease, such as Lofa and Margibi, where losses of paddy crop are estimated in the order of 20 percent. For cassava, being a much less labour and input intensive crop, the impact on its harvest is estimated to be lower at 5 percent at the national level, ranging from 1 percent in Grand Gadeh to over 7 percent in Lofa and Margibi counties. In **Sierra Leone**, the production of the main staple crop, rice, would be lower by 8 percent. The relatively low level of impact at the national level masks the sub-national production and food security impacts. For example, impact on county rice production is estimated as high as -17 percent in Kailahun. The impact on maize harvests is expected to be significantly less (-4 percent) compared to that on rice both at the national level and subnational level. Moreover, reduction in cassava production is estimated to be the least of Sierra Leone's main food crops at -3 percent at the national level and ranging from 1 percent in Bonthe district to -6 percent in Kailahun district of the country. In **Guinea**, the impact is relatively localized with most of the disruption occurring in the forest zone. The production of the main staple crop, rice, would be lower by 3.7 percent and in some areas such as Nzerekore as high as 8.5 percent.

The impact on the maize harvest is expected to be almost the same to that on rice at the national level and subnational level. However, reduction in cassava production is estimated to be much lower at 1.2 percent at the national level.

Country	Reduction in Production due to Ebola, '000 t	Value of production loss, Mill. USD 1/
Rice		
Liberia	24	10
Sierra Leone	100	43
Guinea	55	23
Cassava		
Liberia	19	2
Sierra Leone	37	4
Guinea	4	0.4
Maize		
Sierra Leone	2	0.3
Guinea	24	4

Source: FAO estimates.

1/ Using international equivalent prices: Thai 100% broken rice at USD 425/tonne; US yellow maize at USD 175/tonne; average local price of cassava from Liberia and Sierra Leone, approximately USD 100/tonne; small grains (sorghum, millets, others) approximately USD 100/tonne.

Impact on Markets and trade

All three countries are net cereal importers with Liberia the most reliant on external supplies (up to 80 percent) to satisfy domestic consumption requirements. Cereal import requirements in 2015 are estimated at 445 000 tonnes, 440 000 tonnes and 300 000 tonnes for Guinea, Liberia and Sierra Leone, respectively. Rice accounts for the bulk of imports. Based on commercial imports forecasts, Liberia has about 90 000 tonnes, Sierra Leone about 55 000 tonnes and Guinea about 44 000 tonnes of uncovered gap. These gaps are expected to be covered with international food assistance and/or additional budgetary allocation by the Government. The significant impact of Ebola on export earnings is expected to have compromised countries ability to pay for their cereal import requirements.

Border closures, quarantine measures and other restrictions have seriously disrupted marketing of goods including agricultural commodities, notably in Liberia and Sierra Leone where trade activities have declined significantly, particularly in quarantined districts and counties. In **Liberia**, the retail price of imported rice has increased during several consecutive months, spiking well above the

usual seasonal increases. In October 2014, the increase reached around 40 percent compared to the beginning of the year. Although prices in November remained overall unchanged compared to their levels in October, they remained higher than a year earlier in most markets. Prices have been influenced by exchange rate depreciation and increased transport cost. Prices are highest in the Lofa county, where the EVD outbreak started². In **Sierra Leone**, according to the International Growth Centre³, market prices for domestic rice, cassava, and palm oil continued to be fairly stable in August-October 2014 throughout the country. The price spikes in the south are likely driven by trade disruptions with Liberia. While prices at large do not show any abnormal patterns, there is a substantial decline in trader activity. A small proportion of rice farmers (20 percent) sell their surplus, reduction in trader activity will be particularly harmful for farmers relying on cash crops such as cocoa and coffee. Lastly, monthly retail prices for key food commodities in **Guinea** remained stable between August and November 2014, with the exception of local rice in Labé, which after some months of dramatics increase, dropped rapidly⁴. The border closures with neighbouring Senegal, Liberia, Sierra Leone and Guinea-Bissau have led to a decline of trade volumes of agricultural commodities between Guinea and neighbouring countries. The World Bank reports that the upward pressure on food prices due to disruptions in production and trade restrictions has been offset by the dampening effect of low domestic demand.

² World Bank, LISGIS, Gallup 2014. The socio-economic impacts of Ebola in Liberia. Results from a high-frequency cell phone survey, 19 November 2014.

³ International Growth Centre (2014). The implications of the Ebola outbreak on markets, traders, and food security in Sierra Leone, November 2014.

⁴ According to WFP price monitoring.

The Impact of Ebola on Food Insecurity

The number of severely food insecure is estimated at 630 000 in Liberia, 450 000 in Sierra Leone and 970 000 in Guinea. A total of 170 000 of people are food insecure because of EVD in Liberia whereas 120 000 in Sierra Leone and 230 000 in Guinea. The total number of individuals vulnerable to food insecurity is estimated to be 11 million in Liberia, 2.1 million in Sierra Leone and 3 million in Guinea.

In March 2015, the number of severely food insecure is expected to propel to 750 000 in Liberia, 610 000 in Sierra Leone and 1.2 million in Guinea. A total of 290 000 of these will be food insecure because of EVD in Liberia whereas 280 000 in Sierra Leone and 470 000 in Guinea. The total number of individuals vulnerable to food insecurity is estimated to be 1 million in Liberia, 2.1 million in Sierra Leone and 2.9 million in Guinea.

Country	Severely food insecure Nov 2014	Food insecure due to EVD Nov 2014
Liberia	630,000	170,000
Sierra Leone	440,000	100,000
Guinea	930,000	190,000

Source: WFP estimates.

Recommendations

As earlier mentioned Liberia has about 90 000 tonnes, Sierra Leone about 55 000 tonnes and Guinea about 44 000 tonnes of uncovered food requirement gaps. These gaps are expected to be covered with additional Government resources or international assistance. The analysis indicates that different types of food assistance will be required. In addition to covering the import gap, cash/voucher transfers can assure food access for people whose main livelihood is not agriculture. Given reductions in trader activity, local purchases in surplus areas can assure that surpluses are being redistributed. A targeted effort to re-establish farming systems with the provision of key farm inputs, such as seed, fertilizer and assistance for adoption of improved technologies, with stakeholder consultation and participation, would be required to rebuild the community resilience.