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Republic of
Liberia

**Market Review
(LMR)**

Conducted December 2006–February 2007

**Strengthening Emergency Needs
Assessment Capacity (SENAC)**



**World Food
Programme**

Republic of Liberia: Liberia Market Review (LMR)

Monrovia, July 2007

FOREWORD

The Liberia Market Review complements the Comprehensive Food Security and Nutrition Survey that was launched in October 2006 and forms part of a knowledge base on food security and nutrition that strives to enhance the development of a National Food Security and Nutrition Strategy for Liberia. The review, conducted between December 2006 and February 2007, will in no doubt fill in some of the information gaps that resulted from the 14-year civil war period. It provides an overview of the current performance of the marketing system and its relationship to food security.

One of the greatest challenges for the Government of Liberia and its development partners including the specialized UN agencies, donors and non-governmental organizations is to clearly understand the scope and nature of the tasks that lie ahead to enable Liberia to fully recover from the aftermaths of the protracted civil crisis. This report provides some of the answers to these challenges.

The formal and informal marketing sector is critical to our national economy in three respects. First, the vast majority of our urban and semi-urban population depends on markets to purchase its food on a daily basis. Second, a substantial percentage of the urban and semi-urban population derives its livelihood from petty trading. And finally, the farming households depend on markets for the sale of their farm produce and for purchasing other consumer items as well as production inputs.

Given the above, a sustainable marketing system is very essential to the attainment of food security in Liberia. Therefore, the report recommends the monitoring of markets and prices within the context of a food security monitoring system. It also provides a list of indicators to be monitored on a regular basis.

The report points out the following as a means of eradicating or minimizing food insecurity in Liberia: (1) improved access to markets; (2) improved availability of food commodities; (3) enhanced capacity of market institutions; and (4) improved marketing infrastructure and services.

On behalf of the Government of Liberia, I would like to extend my sincere thanks and appreciations to all agencies and organizations for their support. In particular, I would like to commend the European Commission's Humanitarian Aid Office (ECHO) for providing the required financial support. A special thanks goes to the University of Liberia, the United Nations World Food Programme (WFP) and the Food and Agriculture Organization (FAO) for their technical guidance and support throughout the review. Additionally, I would like to thank the National Information Management Center (NIMAC), the Liberia Institute for Statistics and Geo-Information Services (LISGIS), the Liberia Marketing Association, and the various line Ministries and Agencies of Government for their valuable contributions. Finally, I am extremely grateful to all individuals, marketers and farmers who provided their time and effort to make this exercise a reality.

The Government looks forward to collaborating and cooperating with all partners to address food insecurity and malnutrition. The report provides an important piece of the overall framework that will enhance the attainment of food security and nutrition for all Liberians.



Dr. J. Chris Toe
MINISTER
Ministry of Agriculture
Monrovia, July 2007

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The primary and secondary data collection and analysis of the review were primarily carried out by the Ministry of Agriculture (MOA), the Ministry of Health, the Food and Agriculture Organization (FAO), the World Food Programme (WFP), and the University of Liberia (UL).

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Tarnue D. Koiwou
MOA – National Economist
E-Mail: tarnue.koiwou@wfp.org

Claudia Ah Poe
WFP – VAM Officer
E-Mail: claudia.ahpoe@wfp.org

Jeanette Carter
UL – Research Coordinator
E-Mail: jecarter1942@hotmail.com

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LIST OF ACRONYMS

CBL	Central Bank of Liberia
CDA	Cooperative Development Agency
CFSNS	Comprehensive Food Security and Nutrition Survey
CIF	Cost, Insurance and Freight
CPI	Consumer Price Index
DEN-L	Development Education Network-Liberia
DFID	UK Department for International Development
ECHO	European Commission's Humanitarian Office
ECOWAS	Economic Community of West African States
ESF	Emergency School Feeding
FAO	Food and Agriculture Organization
FFW	Food-for-Work
FSLI	Food Support for Local Initiatives
FSMS	Food Security Monitoring System
GDP	Gross Domestic Product
GOL	Government of Liberia
HDR	Human Development Report
HEB	High Energy Biscuits
IDPs	Internally Displaced Persons
IMF	International Monetary Fund
IPC	Indebted Poor Countries
LAMCO	Liberia-American / Swedish Mining Company
LBDI	Liberian Bank for Development and Investment
L\$	Liberian Dollars
LISGIS	Liberia Institute for Statistics and Geo-Information Services
LMA	Liberia Marketing Association
LMC	Liberia Mining Company
LNP	Liberia National Police
LPMC	Liberia Produces Marketing Corporation
MCPI	Monrovia Consumer Price Index
MOA	Ministry of Agriculture
MT	Metric Ton
NPA	National Port Authority
ODAN	WFP Emergency Needs Assessment Services
ODAV - VAM	WFP Vulnerability Analysis and Mapping Branch
PCA	Principal Component Analysis
PDA	Planning Development Atlas
PDPE	WFP Economic Analysis Unit
SENAC	Strengthening Emergency Needs Assessment Capacity
UL	University of Liberia
UN	United Nations
US	United States
VAM	Vulnerability Analysis and Mapping
WFP	World Food Programme

1. Objectives and Methods

The Liberia Market Review was conducted by the Ministry of Agriculture (MOA) with support from FAO, WFP, and the University of Liberia as part of the government's efforts to develop a National Food Security and Nutrition Strategy and establish a food security monitoring system (FSMS). As many Liberians depend for their livelihood and their food security on purchasing and selling food products via markets, the monitoring of markets and market prices is essential. The market review was conducted to describe the Liberian marketing system and to identify market indicators that should be monitored in the context of a food security monitoring system.

The Liberia Market Review was conducted with financial assistance from the European Commission Humanitarian Aid Office (ECHO) – SENAC Project. The review team included a national economist, the staff of the VAM unit of WFP Liberia and a consultant from the University of Liberia. Additionally, two facilitators were recruited from the Ministries of Health and Social Welfare and Agriculture to assist during the field visits. The secondary data analysis was carried out by a socio-economist from WFP Rome ODAV (VAM). Backstopping was provided by WFP Rome/Dakar (ODAV, PDPE) and FAO Liberia.

The methodology included 1) literature and secondary data analysis, 2) key informant interviews at national and county/district levels, 3) observations and structured interviews at market level, and 4) rapid participatory assessment tools at market level. Twenty-one markets in 14 counties were surveyed. The review is a “snapshot” of the marketing system. Visits to market places occurred in January and February 2007. The review was not designed to produce statistically representative results but to provide a description of the marketing system based on qualitative analysis.

2. Background and Macro-Level Statistics

The Liberian civil war affected every community in Liberia as successive waves of fighting swept through the country between 1989 and 2003. 86% of Liberians living in rural communities and 78% of those living in Monrovia were displaced at least once during the war.

The current official population estimate for Liberia is approximately 3.2 million. The population of Monrovia has expanded significantly over the past years to an estimated population of more than one million.

GDP declined by 87% between 1980 and 2006. Exports have reduced sharply and a negative balance of trade has increased substantially. Local currency depreciated from parity with the US\$ in the early 1980s to approximately L\$ 60 to US\$ 1 in early 2007. Since 2004, the economy has slowly improved, with a projected growth rate of over 6% in 2006. Rubber is currently the main export, accounting for approximately 90% of total exports in 2005. Petroleum is the largest import, followed by food of which rice accounts for half of food commodity imports. Liberia is heavily dependent on imported food, with approximately two-thirds of annual consumption of rice being met through imports.

According to the Ministry of Agriculture, more than two-thirds of Liberians are dependent on agriculture for their livelihood. The sector is characterized by low productivity, inefficient management, and low-level technology. The absence of agricultural markets combined with poor rural-urban linkages results in a severely depressed rural economy.

3. The Liberian Market System

The development of the Liberian market system is linked to the growth and diversification of the Liberian economy, to the growth of urban areas with non-food producing consumers, and to the expansion of the road network.

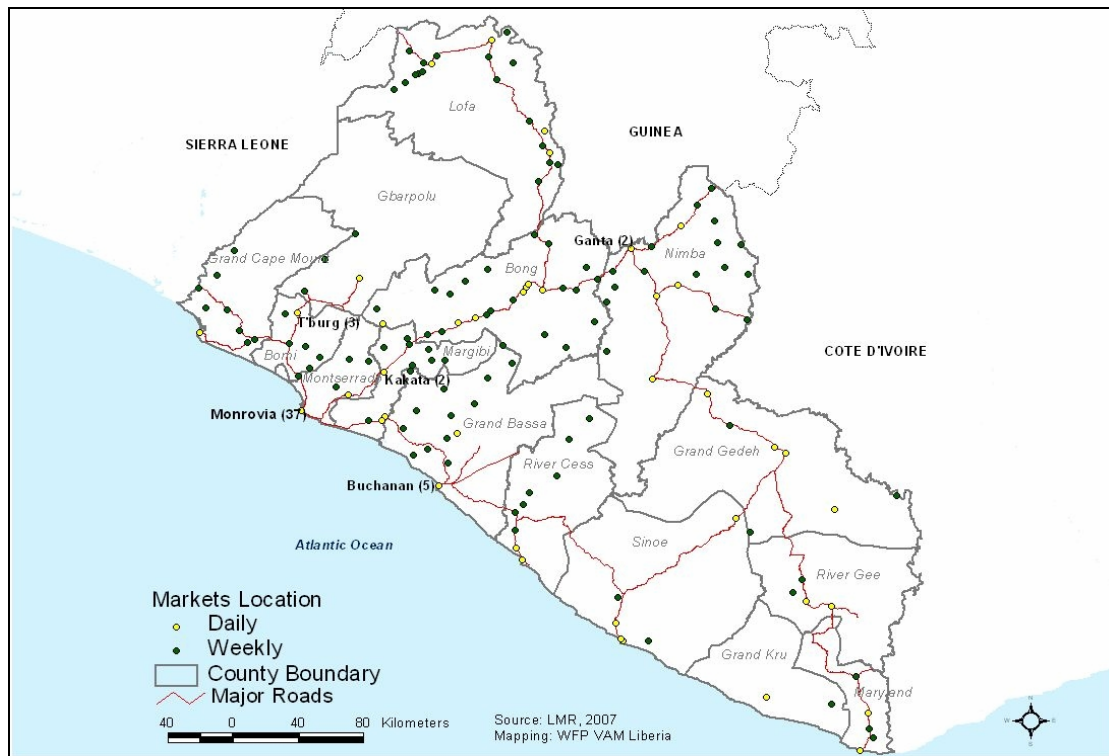
Distribution of Market Places

With assistance from county and local officials, **224 market places** across the fifteen counties of Liberia were identified. Approximately one-third are daily markets, while two-thirds are weekly markets. The “central belt” which runs from Montserrado to Nimba dominates with more than one-third of the markets. These are the counties with improved road access and higher population densities. Daily markets are concentrated in Greater Monrovia.

The major market chains that have been identified are:

- (1) Central, Western, and Northern counties <--> Monrovia
- (2) Grand Gedeh, River Gee, and Maryland <--> Cote d'Ivoire
- (3) Lofa, Bong, Nimba, and Monrovia <--> Guinea
- (4) Lofa, Grand Cape Mount, Bomi, and Monrovia <--> Sierra Leone

The few markets that exist in Grand Kru, Sinoe and Rivercess Counties are localized, meeting the local demand of non-food producers; they are not integrated into the wider system, largely because of their isolation due to bad road conditions and lack of transportation networks.



Liberia Market Association

The Liberia Market Association (LMA), a semi-autonomous body found in 1963, is mandated to provide assistance to the marketers throughout the entire marketing system. The LMA collects annual registration fees and “ticket” or “table” fees from marketers. Seventeen of the 21 markets surveyed were supervised by the institution. In the survey, marketers consistently reported that they do not know what happens to the collected fees, emphasizing that the LMA provides little or no benefit to them, especially in the maintenance and provision of services at the markets.

Types of Markets

The term “market” is used in two senses. One refers to a system of exchange of goods and services which is based on prices determined by supply and demand. The other use refers to a market place as a physical location where goods and services are bought and sold. The markets held **weekly** in rural communities between Monday and Saturday are both wholesale and retail. Producers bring their produce – usually head-loaded – from the

surrounding area for sale, most often to wholesalers. They tend not to be full-time marketers but attend only when they have produce to sell or have urgent needs for cash or for items they do not produce. These transactions often occur outside the market place ("in the bush"). The produce is then transported, usually to Greater Monrovia or other daily markets. At weekly markets, itinerant traders sell dry and imported goods, primarily to the producers. These retailers often travel regular market circuits around a central point.

The **daily markets** which are located in Greater Monrovia, other urban centres, or near concessions, are not simply weekly markets which meet more frequently. In these markets, non-food producers buy food and other goods. The sellers in the daily markets are usually full-time traders, the majority of whom are women.

In Greater Monrovia, two locations serve as **terminal markets**. The "Gobachop" market at the Red Light in Paynesville and the two "Kuwait" markets in Duala function as distribution points for the produce brought from rural Liberia which is then distributed to daily neighborhood markets in Monrovia. At these markets, the bulk-breaking intermediaries ('gobachop') buy produce from the wholesalers and distribute it to other markets in Monrovia. Both retail and wholesale activities occur at these markets.

4. Transportation

The Freeport of Monrovia handles most food imports, especially rice, and other consumer goods. The ports at Buchanan, Greenville, and Harper were formerly used to export iron ore and timber, although their current operations are very limited. The railroad from Bong Mine to Monrovia, originally built to transport iron ore, provides commercial service between the two points. The road network of approximately 700 kilometers of paved roads and 5,600 kilometers of unpaved roads is currently in poor condition, with major sections impassable during the rainy season.

Commercial road transport is provided by a range of taxis, vans, buses, pickups and trucks, most of which are imported used vehicles. During the review, transportation – specifically the lack of access, deplorable road conditions, and high transportation costs – was identified as the most important constraint affecting all traders. Vehicles, often in poor condition, frequently break down on the poor roads, resulting in spoilage of perishable commodities and significant time delays. There is significant variation in costs between the dry and rainy seasons. The south-eastern region of Grand Gedeh, River Gee, Sinoe, Grand Kru, and Maryland is the most affected by high transport costs.

5. Market Facilities and Services

Market places occur either in enclosed or covered structures or in open space. Market structures are of several types. Some are roofed buildings with concrete floors and walls, while others lack walls. Market areas often lack concrete floors and are poorly drained. Many of the market structures were damaged during the war and have required major renovation. Urban daily markets often operate in unsanitary, unhealthy, and congested conditions.

Storage facilities are limited. Of the 21 markets visited, only 9 reported having storage facilities. Cold-storage facilities are now provided at a few markets by a private fishing company.

The processing of locally-produced food is extremely limited. Rice mills which were common prior to the war are limited. There is considerable spoilage of seasonal produce (e.g. mangos, pineapples) because of limited processing and preservation facilities.

Most marketers indicated that there were no credit facilities available. Informal saving-clubs ('*Susu*') are common. Banks outside Monrovia are currently limited to larger urban centers such as Ganta. The Central Bank has branches in several counties that serve to cash government salary checks. Generally, banks are not accessible to petty traders.

6. Food and Non-Food Commodities on Markets

Food commodities frequently sold in Liberian markets can be grouped into several categories that include imported, fresh, and dried items. Four factors influence the quantity and diversity of food commodities that are sold at markets: (i) local demand and purchasing power which is determined by population density and predominant livelihood activities, (ii) agricultural production capacities in the area where the market is located; (iii) condition of road network (main roads and feeder roads) and availability of reliable means of transport, and (iv) the extent to which the produce is perishable.

The types of food commodities found in markets vary in diversity and quantity. During the market visits, the availability of 41 food commodities was assessed. On average, 30 food commodities were found in the markets, ranging from only 14 in Grand Kru to 37 in Montserrado. Generally, fewer food commodities are available in the south-east and in Bomi and Gbarpolu counties in the northwest. Daily markets tend to have more diversity than weekly. Daily markets visited outside Monrovia averaged 32 of the listed food items, compared to only 26 in weekly markets.

Food commodities found in nearly all markets included rice, cassava, plantain, dried fish, and fresh and dried pepper. Rice was found in all 21 markets. Imported rice (butter rice and sodone) dominated in 19 of the 21 markets. Imported parboiled rice was found in only 7 of the surveyed markets. Local or "country" rice was found in 17 of the surveyed markets, mostly in small quantities. Imported rice originates from Monrovia, the entry point, for all of the country's imports except Maryland and Grand Kru which are dependent upon Cote d'Ivoire for imported rice. "Country" rice is mainly produced and sold within the same county, with the exceptions of Montserrado, Margibi, Bong, and Bomi.

Fresh cassava is usually sold in the same county where it is produced. It was found in all markets except for Grand Gedeh, River Gee, and Sinoe. Plantains were available in all counties except Grand Kru. Dried pepper, usually imported from Guinea, was found in all markets. Dried fish was also universally present. Bush meat, mainly dried, was available in 13 of the 21 markets. Locally produced palm oil was available in all markets except River Gee and Grand Kru.

Data on prices of food generally indicated that prices were cheaper closer to Monrovia or in county of origin. Imported rice was most expensive in the south-east, while country rice was cheapest in Lofa. Dried fish was cheapest in the coastal counties and most expensive in Gbarpolu. Dried bush meat was cheapest in the originating counties of Grand Gedeh and Lofa and most expensive in Montserrado and Grand Cape Mount.

The presence of 17 non-food items in the markets visited was assessed, including agricultural inputs, fuel for cooking, medicine and clothing. Overall, the variety of non-food items correlates with the variety of food commodities found in markets. Generally, counties with more difficult physical access – south-east and Gbarpolu – have much less diversity compared to the other counties. The diversity increases the closer the market is to Monrovia.

Agricultural inputs had limited availability. Rice seed was found only in three markets in Montserrado, Lofa and Grand Gedeh. Vegetable seeds were found in 16 markets visited, but were not available in the south-eastern counties. Imported and locally produced tools for agriculture were found in 9 markets. Locally produced tools were found in Bomi and Grand Gedeh.

7. Cross-border Trade

Liberia shares porous borders with Guinea, Sierra Leone, and Cote d'Ivoire. Food and non-food commodities flow in both directions across the borders and are sensitive to the political environment, variation in exchange rates, and availability of commodities. Marketers identified problems such as poor road conditions, limited or unreliable transportation, and arbitrary or high customs duties.

At present, it appears that Guinea is Liberia's largest regional trading partner. Food imports are primarily dried peppers, sesame seed, and groundnuts. Products exported

include palm oil, kola nuts, cocoa, and coffee. South-eastern Liberia is heavily dependent upon Cote d'Ivoire for a number of basic commodities, especially rice.

8. Constraints of Marketers

For producers, wholesalers, and retailers the most frequently cited constraint is the deplorable condition of the nation's roads. Producers do not have adequate road access to markets, severely limiting the quantity of produce they can sell. Closely linked is the limited availability of reliable transport, especially in more isolated areas. Transportation costs are considered high, especially during the rainy season. Delays in transport often result in losses to the marketers or necessitate their selling at reduced prices.

Low demand for agricultural produce was cited as a constraint by producers. The limited number and low purchasing power of non-food producers translates into few buyers, especially in isolated areas.

Other constraints, mentioned especially by retailers, were the high purchase price of goods, the lack of storage facilities at markets, and the poor condition of markets.

9. Household Food Security and Markets

The Liberia and Greater Monrovia Comprehensive Food Security and Nutrition Surveys (CFSNS, 2006 and 2007) highlight the dependence of households on markets. In rural Liberia, petty traders, employees, skilled and contract labourers, palm oil sellers, rubber tappers, charcoal producers, hunters, and fisher folks depend on markets to purchase their food; also food crop producing households need to buy goods that they do not produce. Additionally, food crop producers, palm oil sellers, rubber tappers, charcoal producers and hunters depend on a functioning market system to sell their products.

Livelihoods groups in Greater Monrovia, most of whom do not produce food at all, rely even more on markets to meet their food needs. In Monrovia, the importance of marketing and petty trade for women is especially pertinent, for whom it is the main income activity followed by small-scale trade.

Households Expenditures on Food and Non-food Items

Based on the CFSNS, rural households have much lower cash expenditures compared to urban households. They spend 66% of their cash expenditures mainly on staples: rice (25%), bulgur (9%), fish (9%), condiments including salt and pepper (6%), oil (5%), cassava (4%), and bush meat (4%). The largest non-food expenditures are being spent on transport and housing (both 6%).

Urban households in comparison only spend 52% of their income on food: 17% on rice, 8% on fish, 5% on oil, and 4% on food consumed outside the household (e.g. from 'cook shops', canteens, restaurants, etc.). They spent more on education (8%) and utilities (8%) compared to rural households. They also spent 5% on pre-paid phone cards, an expenditure which was close to zero in the rural sample in early 2006.

Physical Access to Markets

Nearly all households in Liberia have access to a weekly or daily market, although they often have to walk distances of as much as 9 hours.

Access to markets is critical to all Liberian households, urban and rural, in two ways: (1) as a means of livelihoods, and (2) as a source to access food. Any disruption of the marketing system will have a fundamental impact on the food security situation in the country. Counties that are not integrated into the national marketing system, in particular Gbarpolu and those in the South-East, are more likely to be vulnerable to food insecurity. Counties with close connections to Monrovia are less likely to be food insecure.

Shocks and Risks Affecting the Marketing System

The biggest risk to the marketing system in Liberia has been political. During the civil war, markets did not function normally. Seventeen out of the twenty-one markets surveyed were disrupted during the war and eight did not reopen until 2004.

The current volatile political situations in Cote d'Ivoire and Guinea pose a risk to markets in Liberia. Instability or violent conflicts in both countries have affected the flow of produce to Monrovia. The south-east is heavily reliant upon goods purchased in Cote d'Ivoire while the northwestern counties obtain produce from Guinea. In early 2007 the political instability in Guinea caused a shortage of dried peppers and groundnuts throughout Liberia.

As Liberia is heavily dependent on food imports, price increases of food commodities could be a major threat to food insecurity in the country. Prices of wheat, rice and maize in the international market have shown an upward trend since 2001, particularly since 2006. Households that do not produce crops – such as urban households or traders - will be particularly vulnerable to price fluctuations on the international market.

10. Conclusions and Recommendations

Currently, the economy is in the early phases of recovery from a devastating civil war. Unemployment in the formal sector is high and the purchasing power of most Liberians is limited. Agricultural production, significantly below pre-war levels, is subsistence-oriented for most small holder farmers. The production of cash crops that provided significant income for these farmers pre-war is just beginning to revive.

The depressed state of the economy has forced many Liberians, especially those in urban areas, into the informal marketing sector. Entry into this sector requires little education or training and minimal capital. The flexibility of the urban informal sector enables individuals to pursue several income-generating activities at a time. In this environment, the sector is characterized by large numbers of small-scale traders selling similar commodities combined with a weak local demand. Assuming that the Liberian economy will improve and that there will be other employment opportunities, a number of those currently in the informal sector will opt for other income-earning activities, decreasing the number of sellers. At the same time, as incomes improve and people have more cash to spend, demand will increase. Fewer sellers responding to increased demand should result in improved incomes for these sellers.

Many rural households are selling produce primarily to meet immediate cash needs and relatively few rural households are producing significant amounts for the market. If a rural household is able to meet its basic needs and has available labour to produce a "surplus" to sell, the household is faced with the challenge of getting that produce to market. If provided with a reliable transport network, rural producers are likely to respond to improved marketing opportunities.

Based on the analysis, the report concludes by providing recommendations in the following five areas: (1) improved physical access to markets; (2) improved availability of food commodities; (3) enhanced capacity of market institutions; (4) improved marketing infrastructure and services; and finally (5) recommendations are provided to monitor markets and market prices in the context of a food security monitoring system.

Improved Physical Access to Markets

- Government and its development partners should prioritize the rehabilitation and reconditioning of the existing road network, including both the major trunk roads and farm to market roads. In the longer-term, the road network needs to be expanded and upgraded.
- Improve access to small business loans and training to private investors to encourage more engagement in commercial transportation.
- Promote the formation of informal groups and networks comprised of farmers and traders that support each other, for example, by sharing a vehicle for the transportation.

- Advocate for the establishment of a regular commercial service along the Yekepa-Buchanan railway when rehabilitated.

Improved Availability of Food Commodities

- Increased agricultural productivity through improved technology, expansion of extension services, improved access to farm inputs, and multiplication centers for improved and high yielding seeds and planting materials. Improving storage techniques and facilities are important in communities and market places.
- Improved processing techniques and facilities to enhance utilization of produce. In particular, the availability of rice mills at close proximity to markets would ease the serious labour constraint in processing locally-grown rice for market sale.
- Dissemination of technology for processing and preserving cassava and plantains and other crops would reduce losses due to spoilage and broaden marketing opportunities. The introduction of appropriate processing and preservation techniques would also permit year-round utilization of seasonal produce.

Enhanced Capacity of Market Institutions

- Review the act that established the Liberian Marketing Association (LMA) and determine if legislative revision or repeal of the Act is required to ensure that critical services are provided to marketers.
- Greater involvement of marketers in the election of the leadership of the LMA and increased transparency and participation of all members in the collection and allocation processes of market fees.
- Encourage the formation of farmer marketing cooperatives to protect the interests of producers and small-scale traders.

Improved Marketing Infrastructure and Services

- When rehabilitating or establishing market places, priority should be given to locations that are easily accessible to sellers and buyers and where there is sufficient supply and demand.
- All markets should be equipped with drainage and waste disposal facilities. They also should have water for drinking and cleaning as well as toilet facilities.
- Weekly markets need structures that provide protection from rain and sun and that can be kept clean. Wholesale markets require access, space, and flexibility to accommodate different types of produce. Daily markets require roofs, concrete floors, good ventilation, interior lighting, warehousing or storage facilities, including cold storage.
- Offer training in basic business management, accounting and literacy to petty and small-scale traders to empower them and increase their negotiation skills.
- Improve access to micro-credit to enable marketers to begin trading in new commodities that require more start-up capital.
- Reactivate and expand banks to rural Liberia, including the Agricultural and Cooperative Development Bank to provide services to marketers.

Monitoring of Markets and Market Prices

- Integrate key market indicators (availability of key food commodities; price of staple food – mainly country rice, imported rice, cassava, palm oil and dried fish; transport costs; etc.) into the National Food Security and Nutrition Monitoring System. Indicators should be collected and analysed on a regular basis and the following factors should be considered when identifying the sites: (1) areas with high population density/high urbanization, (2) areas that are geographically isolated, (3) counties with active cross-border trade with neighboring countries, (4) high agricultural production areas, (5) centrality to the capital Monrovia, and (6) market frequency (daily/weekly).

INTRODUCTION

The Government of Liberia - supported by its partners - is developing a National Food Security and Nutrition Strategy and a food security monitoring system (FSMS). As many Liberians depend for their livelihood and their food security on purchasing and selling food products through markets, monitoring markets is considered an essential part of the FSMS. Understanding food markets and the linkages of households with these markets permits an adequate analysis of market indicators such as prices.

Furthermore, understanding the functioning of markets in a normal situation allows a better understanding of the impact of a shock on the markets and marketing system and its subsequent effects on the relevant population.

Therefore, the Ministry of Agriculture (MOA) with support from FAO, WFP and the University of Liberia conducted a market review to highlight the essential market information/ indicators useful to: i) analyse markets within the food security framework; and ii) monitor within the context of a food security monitoring system.

1.1 Objectives

An improved understanding on the linkages between households and markets is critical for identifying appropriate interventions to improve food security in Liberia. Within the context of establishing a food security monitoring system (FSMS), understanding the characteristics and functions of the market system in Liberia is essential.

The objective of the market review profile is to describe the basic structure of markets and to analyse the relationship between household food security and the performance of markets, particularly during a shock. The review will also identify market indicators that should be monitored in the context of a food security monitoring system. The specific objectives of the review were to:

- Analyse the relationship between household food security and market performance
- Identify potential (sub)-national/international shocks and their likely impact on the markets
- Identify key market indicators for the food security monitoring system
- Inform decision-makers on market performance including key attributes

1.2 Definitions and Conceptual Framework

Throughout this report, the term “market” is used in two senses. One refers to a system of exchange of goods and services which is based upon prices determined by supply and demand. The other use refers to a market place as a physical location where goods and services are bought and sold. The market system can function, and often does, without a physical location. In Liberia, although market places are important centers for transactions, much of the produce does not pass through a market place until it arrives at its final retail destination. Rather, it is purchased “in the bush” from producers before it arrives at the market.

The conceptual framework used for the Liberia Market Review is based on the Sustainable Livelihoods Framework developed by DFID (1998) in the importance of markets to achieve household food security. Figure 1 highlights the ways in which households’ livelihoods and access to food depend on a range of markets for:

- (i) The acquisition of inputs necessary for production and income-generating activities (input markets);
- (ii) The sale of products and labour (food, non-food, and labour markets);
- (iii) The purchase of food if households do not produce or if production fails; and
- (iv) The national food market which is determined by national production and stocks, commercial imports and international food aid.

Though it is recognized that all types of markets are relevant to achieve national and household food security, this review will focus on the markets that are highlighted in red: national food availability as well as local markets where food commodities are bought and sold.

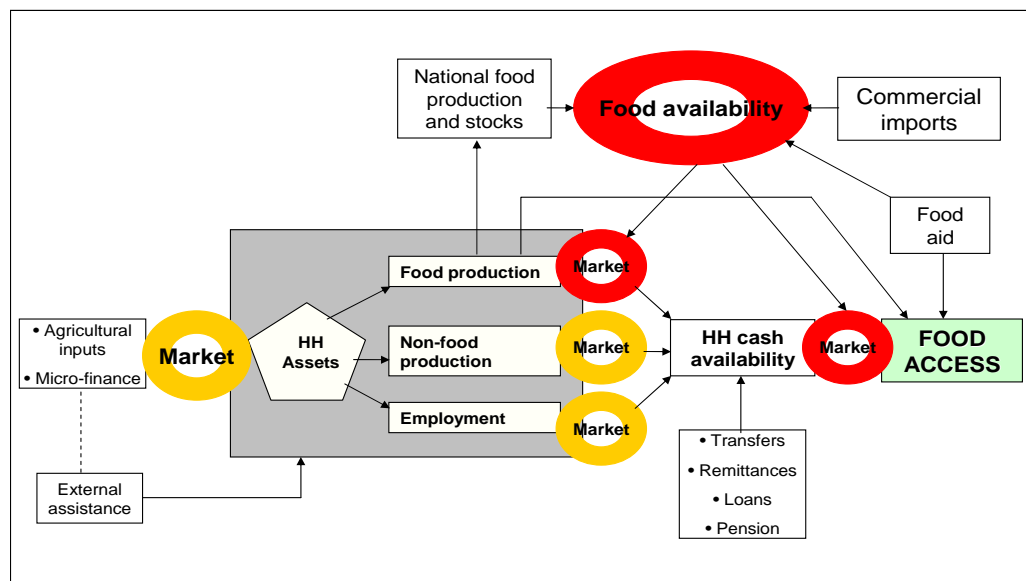
1.3 Stakeholders and Implementation Process

The Liberia Market Review was led by the Ministry of Agriculture and supported by WFP and FAO. The review was made possible through financial assistance of the European Commission Humanitarian Aid Office (ECHO) – SENAC Project.

The review team included a national economist, the staff of the VAM unit of WFP Liberia and a consultant from the University of Liberia. Additionally, two facilitators were recruited from the Ministries of Health and Social Welfare and Agriculture to assist during the field

visits. The secondary data analysis was carried out by a socio-economist from WFP Rome ODAV (VAM). Backstopping was provided by WFP Rome/Dakar (ODAV, PDPE) and FAO Liberia.

Figure 1: The Role of Markets for Livelihoods and Food Security



1.4 Methodology

The review was not designed to produce statistically representative results but to provide a description of the marketing system based on qualitative analysis.

1.4.1 Secondary Data Analysis and Literature Review

Generally, data are scarce and not readily available for all sectors. The Liberia Market Review team was able to compile and analyse the following datasets provided by various agencies and institutions:

- LISGIS: Monrovia Consumer Price Index (2000-2004)
- Ministry of Labour: Employment and wages
- Ministry of Commerce: Statistics in imports and exports (2000-2005)
- WFP Liberia M&E database: food aid distributions (2001-2007)
- IMF: Macro-economic indicators (2000-2005)
- FAOSTAT: Per capita food consumption data (2000-2004)

The review also makes use of the CFSNS datasets (rural and urban) to describe the general food security situation, physical access of households to markets, income activities and livelihoods, and share of food expenditures in total household expenditures.

The secondary data analysis was complemented by a review of available literature, which mostly predates the war. Recent relevant literature on Liberian markets and the marketing system is scanty.

1.4.2 Key Informant Interviews

Key informants interviews were held at national as well as county and local level. In total, 33 interviews were conducted, 9 in Monrovia and 24 across Liberia in county capitals and markets visited (see annex 1).

At the national level, interviews were conducted with representatives of relevant agencies and institutions including the Ministries of Commerce, Labor, Agriculture, Finance,

Transport, the Central Bank, Liberia Institute of Statistics & Geo-Information Services (LISGIS), Liberian Produce Marketing Corporation (LPMC), National Port Authority (NPA), Liberia Marketing Association (LMA), and the Sinkor Trading Corporation to collect available information and assess the level of support being provided to the marketing sub-sector.

At the local level, county or development superintendents, district commissioners and LMA market superintendents served as key informants. Information on location and frequency of markets was obtained from county and market officials.

1.4.3 Market Visits

The review was conducted in all 15 counties. Given logistic and time constraints, markets were selected based on their frequency (daily, weekly), geographic location (rural, urban and proximity to the border) and the type of market (wholesale, retail or combined). Twenty-one markets were surveyed (see annex 2).

In line with the TOR and technical guidance for market data collection and analysis, a structured questionnaire was designed to collect primary data. Given the time constraint and the expected output, the questions were designed to collect mostly qualitative information. The following information was collected: market structure, estimated number of traders by sex, list of food and non-food commodities available, LMA supervision and market fee collection, cash and barter, storage and warehousing facilities, access to credit facilities, origin of sellers and buyers, origin of food produce, cross-border trade, availability of and costs of commercial transport, constraints of retailers, wholesaler and producers, historical trends, seasonal fluctuations of supply and prices of important food commodities as well as their current prices.

Information was gathered using a mix of methodologies including observations, interviews with individual traders, focus group discussions with retailers, wholesalers and producers using participatory rural appraisal tools, and weighting and estimating average costs of key food commodities.

The facilitators were trained and the questionnaires and other tools were pre-tested at the Old Road Joe Bar Market in Sinkor, Monrovia. The pre-test results were discussed with the review team and final adjustments were made to the questionnaires.

1.5 Limitations and Constraints

The market review is a "snapshot" of the market system, with markets being visited only once in January-February 2007. The review is not designed to produce statistically significant data but rather qualitative and descriptive analysis. Because the focus was on the market places, data were not collected on transactions that occur outside the market place. While all 15 counties were visited, the visit to River Cess occurred on a day when no weekly market was taking place.

As a consequence of the civil war, reliable data are scanty. Data are often fragmented and based upon estimates. There are no current, reliable production data available. Statistical information quoted by international institutions is often based on regional averages rather than empirical local data.

It was not possible to determine profit margins from the survey. Traders are extremely reluctant to answer questions that deal with profit and will claim that they do not know how much they make. In order to establish these margins, an alternative approach which tracks particular commodities would be required.

2.1 The Aftermath of the Civil Conflict

The civil war affected every community in Liberia. Between 1990 and 2003, there were successive waves of fighting throughout the country. In some areas, towns were burned or destroyed more than once. The major disruptions in Monrovia took place in 1990, 1992 (Octopus), 1996 (Operation Pay Yourself), and lastly, 2003 when factional fighting engulfed Monrovia and President Taylor was forced from office.

According to the CFSNS (2006), 86% of Liberians currently living in rural and semi-urban Liberia were displaced at least once. The proportion was slightly lower for households in Greater Monrovia (78%). Households were displaced on average twice between 1990 and 2003.

The highest rates of displacement during the conflict were in Bomi, Lofa, and Grand Bassa. Everyone in Bomi reported being displaced, while only 1% in Lofa and 2% in Grand Bassa were never displaced. The areas with the least displacement were in the south-east. In Grand Kru, 53% reported not being displaced, while Sinoe reported 34%. Of those displaced, 57% of the households returned before 2005, and 20% since 2005. In Lofa, 75% returned in 2005/06 and return migration is still ongoing.

As rural communities begin to rebuild, the population is less diversified and less stratified than pre-war. The Liberian professional and middle class has not, for the most part, returned. There is still a substantial refugee population in neighboring countries and a substantial population in the Diaspora.

2.2 Demographic Profile

The current official population estimate for Liberia is approximately 3.2 million, with other estimates ranging from 2.6 million to 4 million. The last national census was conducted in 1984. Projections from that census have been based upon natural increases and do not take into consideration war-time mortality, changes in the birth rate, and displacement or migration of the population. The population of Monrovia has expanded significantly over the past years with current estimates of 1 million+ for the Greater Monrovia area. Estimates are that about one third of the population is living in the Greater Monrovia area. A national census will be conducted in 2008.

The rate of population growth was estimated at 3.4% in 2003, with life expectancy estimated at 48.7 for males and 47.1 for females. Child mortality was 194/1000 for males and 198/1000 for females. Approximately 75% of Liberians live below the poverty line of less than \$1 per day. 52% are estimated to live in extreme poverty, i.e. below 0.50 USD per day. Unemployment in the formal sector is estimated at 85% (HDR 2006).

The majority of Liberians, mainly youth, are either unemployed or employed in the informal sector as a result of the shrinkage in the formal sector combined with the disastrous political, economic and social effects of the war.

2.3 State of the Economy

Liberia was a middle income food secure country in the 1970s. Today, however it is an entirely different situation with a GDP per capita of only US\$191.5 (HDR 2006) compared to US\$1,269 in 1980, an 87 percent decline. Exports have reduced from US\$486 million in 1978 to about US\$112 million in 2005. External debt rose to an estimated US\$3.7 billion—about 800 percent of the GDP and 3,000 percent of exports. Additional domestic debt and non-salary arrears amount to US\$700 million—mostly owed to the national banking system. Local currency significantly depreciated from parity with the US\$ in the early 1980s to approximately L\$60 to US\$1 in early 2007.

Since 2004 the economy has slowly improved, reaching a GDP growth rate of 5.3 percent in 2005 and a projected growth rate of over 6 percent in 2006. Central Bank of Liberia's

net foreign exchange position has also improved from a debt of US\$ 0.3 million in 2003 to an estimated US\$ 9 million reserve in 2005. This, however, reflects foreign exchange reserves for only 0.3 months in terms of imports of goods and services. Inflation has also declined from 15 percent in 2003 to about 6 percent in 2005.

Table 1 presents the sectoral GDP shares at the current prices. With the exception of forestry, all sectors have recovered from the extremely low levels of 2003 to closer to year 2000 levels.

Table 1: Sectoral Gross Domestic Product (2000-05)

	2000	2001	2002	2003	2004	2005
	US\$ Million					
GDP at current prices	560.9	543	559.3	435.3	496.8	548.4
Agriculture and fisheries	286.8	277.1	288.5	199	259.8	284.8
Forestry	117.1	120.9	133.9	94.9	59.5	64.2
Mining and panning	1.0	0.2	0.2	0.3	0.4	0.4
Manufacturing	53.2	38.5	31.8	29.9	58.8	65.7
Services	102.7	106.2	104.9	111.2	118.3	133.3
	Percentage Shares					
GDP at current prices	100.0	100.0	100.0	100.0	100.0	100.0
Agriculture and fisheries	51.1	51.0	51.6	45.7	52.3	51.9
Forestry	20.9	22.3	23.9	21.8	12.0	11.7
Mining and panning	0.2	0.0	0.0	0.1	0.1	0.1
Manufacturing	9.5	7.1	5.7	6.9	11.8	12.0
Services	18.3	19.6	18.8	25.5	23.8	24.3

Source: Liberia Statistical Appendix IMF 2006

Agriculture and fisheries are the biggest contributors to the GDP, followed by the services sector. Forestry and manufacturing sectors are both contributing about 12 percent each. This is a sharp improvement for the manufacturing sector from 2000. Forestry, however, experienced a sharp decline because of the U.N. Security Council sanctions on timber.

As a sub-sector within agriculture, rubber is the biggest contributor, having doubled its share from 2000 levels. The contribution of rice has declined to less than half of its value in 2000, indicative of the reduction in local rice production experienced over the last six years. Cocoa and coffee shares have remained negligible over the same period (Table 2).

Table 2: Sectoral Origin of GDP, 2000-05 (US\$ Million)

	2000	2001	2002	2003	2004	2005
GDP at current prices	286.8	277.1	288.5	199	259.8	284.8
Agriculture and fisheries	286.8	277.1	288.5	199	259.8	284.8
Rubber	57	50.3	55.4	46	101.2	116.5
Coffee	0.5	0.1	0.1	0	0	0
Cocoa	0.7	0.4	0.6	0.7	2.3	1.2
Rice	61.7	56.1	53.2	27.7	27.1	30.2
Cassava	56.7	57.9	60.9	42.4	41.6	44.9
Other	110.1	112.3	118.3	82.2	87.6	92

Source: Liberia Statistical Appendix IMF 2006

The collapse of the economy has led to very high levels of unemployment estimated at 85 percent in the formal sector. Formal sector employment is currently around 120,000, with 50,000 to 60,000 employed in the public sector. The majority of the population works in agriculture (subsistence farming), the informal economy (trading) and petty production. External remittances from relatives abroad are a major source of support for many. Donor-funded income-generation projects, particularly in the rural communities, are also sources of income.

2.4 Formal Trade Statistics

The major imports and exports along with their percentage shares are presented in annex 3. Liberia's main export is rubber which accounted for 88 percent of total exports in 2005. The share of rubber exports has more than doubled since 2004 due to the increased price of rubber on the world market, encouraging local production. The quantity of cocoa exported has improved since 2004 but remains small in absolute terms at US\$5.7 million in 2005.

Petroleum is the largest component in Liberia's total imports accounting for about 33 percent in 2005. Food and live animal imports are second (19 percent) of which rice accounts for about half. Rice imports have declined both in value and percentage terms—in 2003 rice imports accounted for US\$39 million compared to US\$25 million in 2005. This indicates a declining trend in commercial rice imports assuming no substantial decline in world market rice price.

Liberia's balance of trade shows a deficit of about US\$161 million in 2005. This deficit has sharply increased since 2003 when it was only US\$31 million. Much of this increase is explained by the high world market crude oil prices.

The major export partners in 2005 were Belgium, Spain, US, Malaysia, Thailand, Poland and Germany. Imports mostly came from South Korea, Japan, Singapore, Croatia, China and India.

2.5 National Agricultural Production

Approximately 70% of Liberians are dependent upon agriculture for their livelihood (MOA 2007). The sector is characterized by low production, in part a result of the collapse of the sector during the civil war, and of inefficient management and low-level technology. Currently, the sector is absorbing by default many of the young people, including former combatants, who seek something more than subsistence agriculture as their future. In the past, the agricultural sector was divided between the commercial, largely-export oriented, portion and the small-holder portion that was largely neglected. To achieve the goals of poverty reduction, growth, and development, both portions of the sector require attention. In addition to improving food security, the objective is to improve agricultural incomes and to expand agricultural exports that contribute to foreign exchange and domestic revenues. Per-capita income in the sector is estimated to be one eighth of the pre-war level.

Liberia is heavily dependent on imports for its food consumption. Rice is the most important staple, with approximately two-thirds of the annual consumption being met through imports. Significant numbers of Liberians have received food assistance during the years of conflict, with the emphasis shifting from emergency distributions to emergency school feeding (ESF) and Food for Work (FFW), known locally as Food Support for Local Initiatives (FSLI). Household agriculture is depressed by low yields and few marketing opportunities. Farmers have little opportunity to learn new technology and/or apply improved varieties. Yields are lower than before the war and post-harvest losses are high, largely because of animals and other pests.

Most households now focus on food crop production. Less than one-fifth grow vegetables, probably due to marketing constraints. The absence of agricultural markets combined with poor rural-urban linkages results in a severely depressed rural economy.

Priorities for improving agricultural production include 1) improved yields for food crop farmers; 2) on-going support to smallholder tree crop farmers, and 3) continued support to small enterprises, encouraging basic agro-processing and off-farm rural-based enterprises.

2.6 Rice Imports

The imported rice market in Liberia has an estimated demand of 200,000 tons annually. After much controversy surrounding the awarding of licenses to import rice, Sinkor Trading Corporation became the largest importer of rice in the country in late 2006, replacing

Bridgeway and K&K who had previously been the main importers. More specifically, Sinkor Trading Corporation provides about 10,000-13,000 bags daily against an estimated demand of 10,000-15,000 bags (100 lbs each).

From January to October 2006, Liberia imported about 174,000 tons of rice—162,000 tons commercial and 12,000 tons non-commercial—at a total cost of US\$59 million.

Sinkor Corporation imports three types of rice: parboiled and butter rice from China and white long grain rice from India. Butter rice is the preferred and commonly used variety.

GOL has a fixed price scheme for imported rice. Domestic prices both at the wholesale and retail level are adjusted depending on the world market price trends (Table 3).

GOL through the Ministry of Commerce and Trade has also established a two month strategic reserve of approximately 700,000 bags which is also maintained by SINKOR.

In addition, a price stabilization fund for rice was started by assessing US\$0.25 per bag of imported rice. The current value of this fund, maintained by the Ministry of Finance, is over US\$1 million.

Table 3: Fixed Wholesale and Retail Prices for Imported Rice (December 2006)

Origin	Type	Price (CIF) US\$/MT	Price Wholesale US\$/100 lbs	Price Retail US\$/100 lbs
China	Parboiled	400	23	24
China	Butter	340	21	22
India	White Long Grain	310	19	20

Rice imports are regulated through the issuance of an import license by the Ministry of Commerce without which no formal imports can occur. The importing company has to pay a one-time form cost of US\$25 and US\$1/MT to the Bureau Veritas Group (BIVAC), a private company employed by the government to carry out pre-inspections.

Import related charges, in addition to the CIF Monrovia price, include an import duty of US\$44/MT, National Port Authority (NPA) charges of US\$12.5/MT and an overhead of US\$30/MT for a total of US\$87.5/MT.

Most importers use the “pay as you retrieve” method or establish letters of credit with a two-month grace period. Guarantees, however, are sometimes required for up to 50 percent of the shipment value. Many traders use international rather than national banks, given that the Liberian banks are not competitive, charging up to 15 percent interest. Importers also give 30 day credit to the distributors and plantations. There is a four to five month lag between order confirmations and actually receiving goods.

The main constraint identified by the importers was that the marketing chain is not necessarily followed: importer, distributor, wholesaler and retailer. Price controls at the retail level may not be working since mechanisms to implement and monitor are generally weak. Larger retailers may also be better-off given that they buy in US\$ and sell in L\$.

2.7 Food Aid Imports

As a result of the civil crisis, several humanitarian organizations including specialized UN agencies have been providing food assistance to the people of Liberia. The import and distribution of food aid dates back to 1991. During the literature review and secondary data analysis, there were no readily available statistics.

WFP's food aid intervention in response to the civil war in Liberia started in 1991 with the distribution of food to vulnerable populations. WFP – being the largest food aid provider – distributed a total of 234,137 metric tons of food including cereal, pulses, vegetable oil, CSB/cornmeal, meat/fish, salt and high energy biscuits (HEB) between 2001 and 2006. Catholic Relief Services also has a pipeline.

The largest distributions took place in 2004 and 2005, when IDPs in more than 20 camps were assisted; the last camps were closed in April 2006. Resettlement of IDPs and refugees started in 2004 and is expected to be finalized by mid 2007. Returning households are receiving a start-up package including a 4-month food ration delivered in

two trenches. Since 2006, activities are shifting towards recovery activities such as emergency school feeding (ESF), food support for local initiatives (FSLI), and nutrition intervention programmes. For 2007, the planned tonnage will be around 41,800, which is approximately 60% of the food distributed in 2004.

Table 4: WFP Food Aid Distribution (2001-2007)

Year	Commodities Distributed (Mt.)								Total
	Cereal	Pulses	Veg. Oil	CSB	Sugar	Meat/ Fish	Salt	High Energy Biscuits	
2001	8,691	2,925	0	295	0	0	0	0	11,911
2002	14,807	706	727	401	0	0	66	6	16,713
2003	19,754	3,485	1,183	1,959	112	0	226	23	26,742
2004	55,070	7,558	4,188	6,252	111	0	735	4	73,918
2005	42,144	5,201	3,216	4,712	125	0	668	81	56,150
2006	35,400	5,615	2,554	3,616	262	564	691	0	48,702
2007*	31,859	5,199	2,377	1,495	223	0	678	0	41,831

* = Projected/Planned

Source: WFP Liberia Country Office

2.8 Monrovia Consumer Price Index (MCPI)

MCPI has been compiled and disseminated on a monthly basis since 1964. It is the official measure of inflation in the country that is determined by the changing cost of a fixed basket of goods and services purchased by households composing of two or more individuals and headed by urban wage earners or clerical workers. MCPI covers only Monrovia. It is assumed that price changes there could be used as a proxy indicator for the other parts of the country.

The MCPI basket was recently enlarged from eight to twelve categories and 79 to 235 items within those categories (Table 5). The base price was also changed from May 1998 =100 to December 2005 =100. These changes were introduced to make the index more compatible with that of other ECOWAS States.

Table 5: Latest Consumer Price Index Categories and Weights

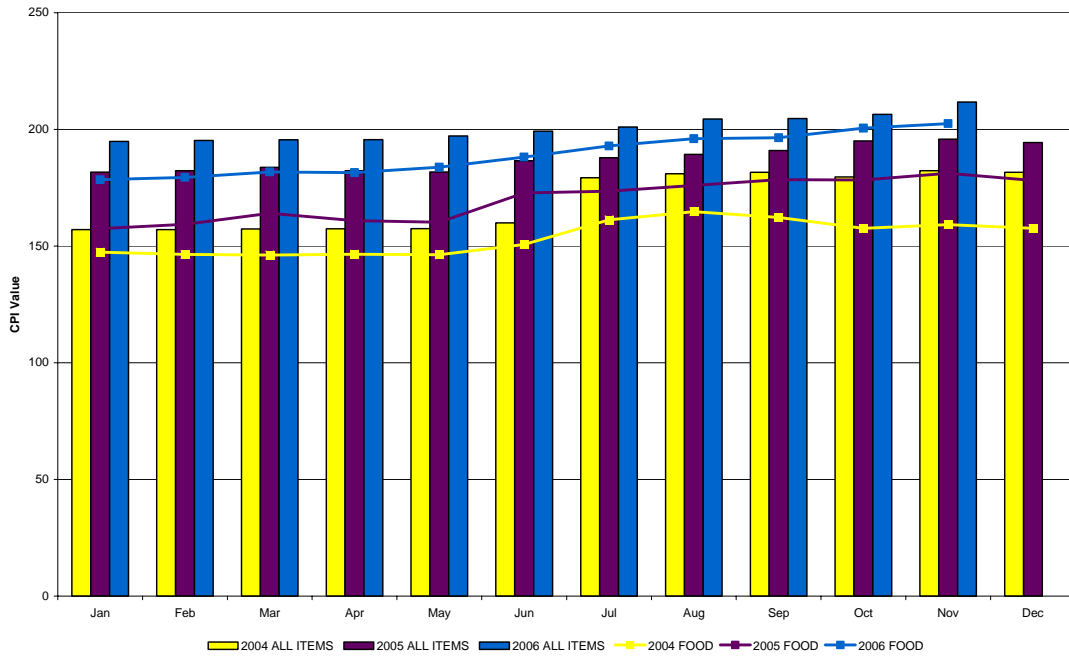
No	CPI Category	Weight
1	Food and non-Alcoholic beverages	35.5%
2	Alcoholic beverages, Tobacco and Narcotics	4.4%
3	Clothing and Footwear	13.0%
4	Housing, Water, Electricity, Gas and other Fuels	15.0%
5	Furnishings, Household equipment and Routine Maintenance of the house	4.4%
6	Health	1.6%
7	Transport	2.4%
8	Communication	5.9%
9	Recreation and Culture	2.2%
10	Education	7.0%
11	Restaurants and Hotels	0.9%
12	Miscellaneous goods and Services	6.8%

Source: Liberia Institute of Statistics and Geo-Information Services, Monrovia.

Staff from the Liberia Institute of Statistics and Geo-Information Services (LISGIS) and the Central Bank of Liberia (CBL) collect prices from two urban markets by making actual purchases of food commodities for three consecutive days during the first and second week of the month. All purchased items are weighed in the market to determine the unit price of each item. For non-food items, price quotes are taken from 30 retail stores, two service centers and one hundred household tenants.

Figure 2 presents the monthly MCPI for all items in comparison to food items for the period 2004-2006. It clearly shows that food inflation has remained below the overall inflation rate for the entire period.

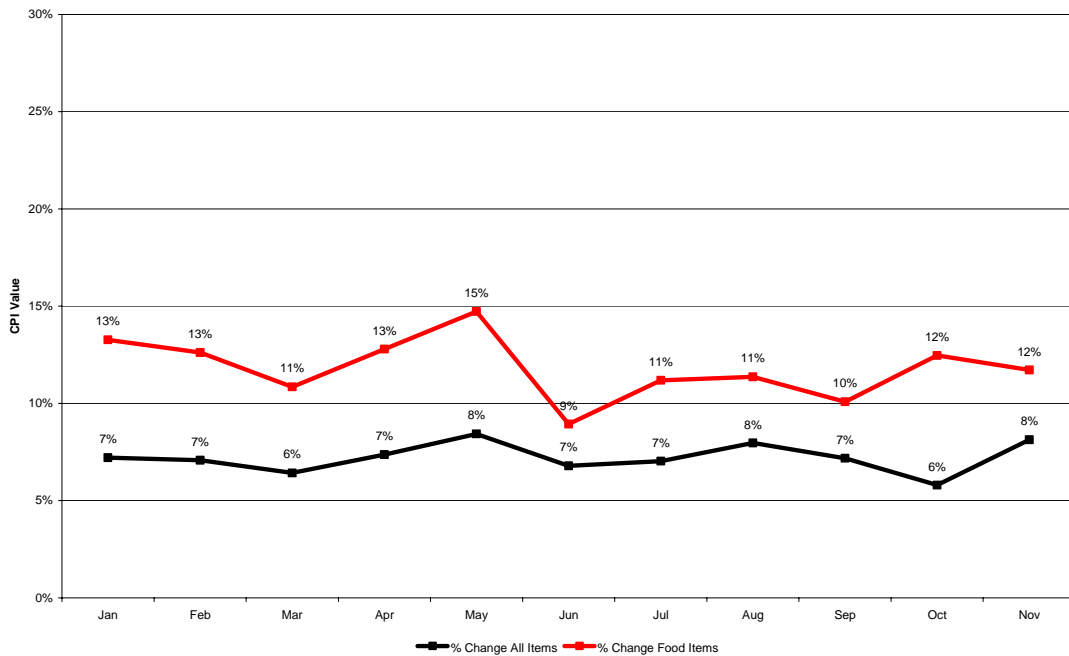
Figure 2: Monrovia Consumer Price Index (2004-06): All Items versus Food Items



Source: Liberia Institute of Statistics and Geo-Information Services, Monrovia.

Comparing month to month changes between 2005 and 2006, however, indicates that inflation for the food items has risen at a higher rate than for all items—12 percent compared to about 7 percent for all items (Figure 3). This increase is most defined during April and May.

Figure 3: Month by Month Percent Change in Consumer Price Index (2005-06): All Items versus Food Items



Source: Liberia Institute of Statistics and Geo-Information Services, Monrovia.

In addition to the CPI, since July 2005, LISGIS is also collecting monthly price data for food and non-food commodities from five counties: Montserrado, Grand Bassa, Margibi, Bong and Bomi. These data are used to generate a monthly price index (relative change) that was initially published on a monthly basis. This initiative is funded by the African Development Bank under the IPC Africa project. The frequency of publications was recently changed to a quarterly basis given lack of financial resources.

The price data collection format under this initiative is highly desirable as a monitoring system given its comprehensiveness. Data for the following fields is collected: Product code, Product name, Outlet type (Observation Date-Time), Outlet code, Observed quantity, Observed unit of measurement, Observed price, Statistical representativeness, Poverty relevance (poor/non-poor), Location relevance (poor/non-poor), Price type (fixed/negotiated), Remarks, Region name, Province name, Locality name, Price collection center code, price collection center name, supervisor name and demography (rural/urban).

Expanding the current system in terms of its geographical coverage and reporting frequency could serve as a viable national price monitoring system. The outputs will also meet the high demand from many humanitarian and development agencies that are currently forced to collect similar information through their own resources.

3.1 Historical Development

The development of the Liberian market system is linked to the growth and diversification of the Liberian economy, to the growth of urban areas with non-food producing consumers, and to the expansion of the road network.

Until the early twentieth century, the Liberian trading system was segmented in two: the coastal and the interior systems. The coastal system centered on transactions between the local population and the sailing European merchants. With the arrival of the settlers in the nineteenth century, competition, including warfare, developed between the newcomers and the indigenous peoples over control of this trade. The interior system linked what is now Gbarpolu, Lofa and Nimba counties with the Sudanic trade centers to the north and was controlled by Mandingo traders. In the latter part of the nineteenth century, the settlers on the coast attempted to break the monopoly of the Mandingo traders by contacting the trade centers in Guinea, but were not successful.

Head-loading, utilizing the labour of porters, was the only means of transport in the years prior to the expansion of the motor road network. Animals such as donkeys and camels that are used in the Sahel were not suitable for the climate. In the nineteenth century, boats were utilized along the coast and short distances up rivers such as the St. Paul.

In the early years of the republic, because the demand for purchased foodstuff was low, there was no demand for rural markets. Smallholder subsistence agriculture was the dominant economic activity in an environment characterized by low population densities and low-level technology. At the turn of the twentieth century, the number of market-places recorded in Liberia probably did not exceed a dozen. Attempts in the early twentieth century to create market-places by administrative order were not successful because the necessary market conditions of sellers and buyers did not exist (PDA 42).

With the establishment of the Firestone rubber plantations in the 1920s, the situation began to change as the non-food producing population began to grow. The growth of privately-owned rubber farms and the introduction of iron ore mining and logging accelerated the process. The diversification of the economy meant the development of new job opportunities and the growth of urban centers. The increased demand for foodstuffs in these centers created incentives for increased food crop production in the catchment's areas. Coinciding with the increased demand for foodstuffs was the emergence of a pool of unskilled labour, primarily female, who became the market traders.

The urban centers developed around several key features. The county administrative centers dominated their counties and their populations diversified to include middle class professionals. Urban areas also developed around the port cities of Monrovia, Buchanan, Harper, and Greenville, and adjacent to the mining and timber concessions.

As the economy diversified, the road network developed. The first period of development was pre-motor road when walking and head loading of goods dominated.

The second period was from the mid-1920s to late 1940s, coinciding with the growth of the rubber economy. The first major motor road link was between Monrovia and the Harbel Plantation of Firestone, with further expansion to Kakata, Gbarnga, and finally Ganta. By the late 1940s the principal axis of the road network, Monrovia to Ganta, was in place. The Cavalla Firestone Plantation was the spur for the road linking Harper to the Pleebo area.

The third period occurred during the 1950s and early 1960s with the development of the iron ore mines. The road link to western Liberia came with the development of the Liberia Mining Company (LMC) in Bomi Hills in the 1950s. The road to Buchanan was paved with the development of the Liberia-American/Swedish Mining Company (LAMCO) in Buchanan in the early 1960s. The railroads linking the iron mines to the ports of Monrovia and Buchanan were built.

The fourth period, from the mid 1960s to the outbreak of the civil war in 1990, saw the further expansion of the road network to its present configuration. Logging companies,

requiring roads for extraction of timber, built a network of privately constructed and maintained roads linking the extraction areas with the exporting ports of Monrovia, Buchanan, Greenville, and Harper. The government road network was extended from Ganta to Zwedru and Pleebo. The bridge across the St. Paul River opened the road to Lofa in the 1960s. By the late 1980s, the motor road was paved to Ganta and to Bo Waterside on the Sierra Leonean border.

The fifth period came with the civil war, 1990-2003, when the road network deteriorated and contracted. Many roads became impassable, especially during the rainy season. Road maintenance was minimal. Logging roads, however, were extended and maintained until timber sanctions were imposed. Markets were disrupted, while women especially turned to marketing as the only way to support their families. The demand for food increased in Monrovia as its population began to swell due to the displacements. But the capital was cut-off politically from the rest of the country. "Front-line markets" developed near the boundaries separating the factions. On the eastern side of Monrovia, usually near Mt. Barclay beyond Paynesville, the market was known as "Kuwait". On the western side at the Po River, a similar market developed. "Behind the line", markets continued to function sporadically in central Liberia. During the conflict, transportation was controlled by fighters of the several factions who commandeered vehicles which they used for their private businesses. Fighters are also reported to have forced civilians to head-load produce, including palm oil, cocoa, and coffee.

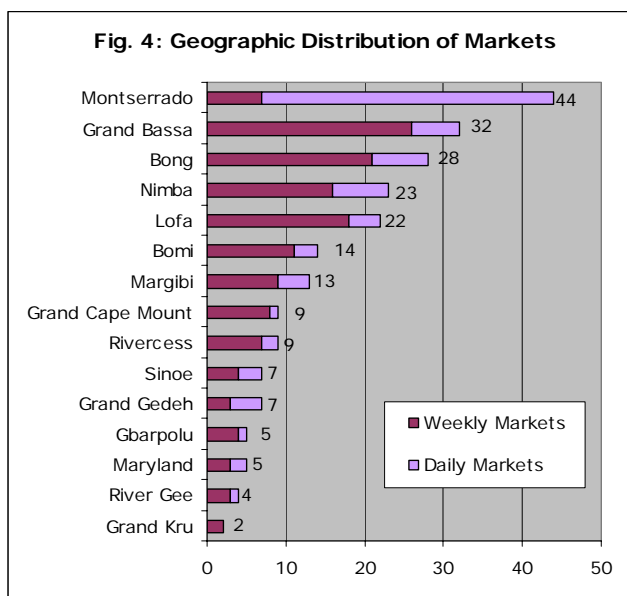
The sixth period began with the cessation of fighting in 2003. Throughout the country, the road network is in poor condition, with most unpaved roads, including many of the logging roads, becoming impassable during the rainy season. The paved roads, with some exceptions, are also in poor condition. The networks of logging roads that provided a coastal link and a link through Gbarpolu to Lofa are no longer available. Throughout the country, rehabilitation began in 2004 and continues.

Looking at the map (see annex 12), it is clear that market places are located along these roads. In particular, the isolation of the south-east is visible. Markets in Sinoe, Maryland, River Gee, Grand Kru, and Grand Gedeh are localized, meeting the local demand of non-food producers, but are not integrated into the wider system, largely because of the constraints of transport.

3.2 Geographic Distribution of Markets

In 2007, many of the markets are again functioning and several new markets are being established. With the exception of the Monrovia markets, however, most appear to be operating well below their pre-war levels. Sellers do not have access to sufficient produce and there are not enough buyers, especially in the urban centers outside Monrovia, to sustain the markets. Those in Lofa, with their strong links to Guinea, and Sierra Leone, and some in Nimba, with strong links to Guinea, are more active.

With the assistance of county and market officials, **224 market places** have been identified in the fifteen counties of Liberia (see annex 10 for complete list). Data are not available on the average size of the markets, and the date of establishment.



Of the markets identified, approximately one-third are daily markets, while two-thirds are periodic or weekly. The "central belt" which runs from Montserrado to Nimba dominates

with more than one-third of the markets. Daily markets are concentrated in Greater Monrovia. The number of markets in Greater Monrovia is nearly three times what was recorded in the early 1970s (Handwerker 1972).

The major market chains that have been identified are:

- Central, Western, and Northern counties <--> Monrovia
- Grand Gedeh, River Gee, and Maryland <--> Cote d'Ivoire
- Lofa, Bong, Nimba, and Monrovia <--> Guinea
- Lofa, Grand Cape Mount, Bomi, and Monrovia <--> Sierra Leone
- Grand Kru, Sinoe, Rivercess, Gbarpolu: Isolated

The counties to the west of Monrovia, Bomi and Grand Cape Mount, and those to the east, Grand Bassa and Rivercess, appear to have less well developed systems but are close enough to Monrovia to provide produce to the urban area. In contrast, the counties in south-eastern Liberia where there are considerably fewer markets are not linked to the Monrovia urban market. Like Gbarpolu, Grand Kru is relatively inaccessible by road. Grand Gedeh appears to have a fragmented system with local authorities in Zwedru only being aware of markets in Tchien district.

3.3 Marketing Institutions

3.3.1 Liberian Marketing Association (LMA)

The LMA was founded in 1963 to solicit President Tubman's assistance in providing better market places in Monrovia. By the late 1960s, the LMA had declined with few active members and irregular collection of fees. There were few branches throughout the country and no national structure (Handwerker 1972). During Tolbert's presidency (1973-1980), the Liberian Marketing Association was formally established by legislative act. Within a short time, the LMA became part of the national political patronage system. The leaders were spokespersons for the Liberian president and the membership was mobilized for political rallies and other events requiring crowds. This situation continued throughout the 1990s until the current government's inauguration in 2006. In the 1970s, the Monrovia City Corporation was also given a legislative mandate to manage markets in Monrovia (see Conteh et al 1982).

Currently, the LMA is a semi-autonomous body which is mandated to provide assistance to the marketers throughout the entire marketing system. The LMA is headed by a president and a vice-president "elected" by the members. There are county and local market officials, appointed by the President of the Association. After disputes over leadership in 2006 and complaints from the membership, the governing body of the association was dissolved and an interim administration was appointed by the President, under the supervision of the Vice President of Liberia. It is assumed that the association will eventually be restructured.

The Liberian Marketing Association (LMA) supervises 17 out of 21 surveyed markets, excluding the main Ganta market (Nimba), Barclayville (Grand Kru), Bopolu (Gbarpolu), and Daniel's Town (Grand Cape Mount). The LMA collects registration fees and "table" fees or "tickets" from traders. In response to questions concerning registration and table fees in the surveyed markets, the traders reported that registration fees were paid annually and ranged from L\$100 to L\$250 in most markets. In addition to the registration fees, traders also pay table fees or get tickets, usually L\$5. For weekly markets, the fees are paid on that market day. In daily markets, the total amount paid varies as the fees are paid from two – six times per week. In some markets, the LMA provides storage facilities for which marketers most often pay L\$5-10 for overnight storage and L\$25-50 for weekly storage. LMA is supposed to use these financial resources to pay for its field and non-field staff and to provide services such as garbage disposal, toilets, roof repairs, storage for perishables and day care facilities for children.

The Red Light and Gobachop markets in Greater Monrovia are the biggest sources of revenue for LMA. These two markets have several thousand wholesale and retail traders. LMA charges a one-time setup cost of L\$250 for a stall in a sheltered space. Each marketer is then charged L\$15 as a maintenance fee. Private storage is also available at a cost of

L\$50 per bundle per week. Traders without permanent stalls pay L\$5 per bag of commodities that they bring to these markets.

During the survey, interviews with marketers consistently indicated that they did not know how much money was being collected nor did they know how that money was being used. Their perception is that the money “goes to Monrovia” and that they receive little or no benefit from fees paid. They do not see the money being used for maintaining and improving the market.

In some markets, the traders collected money separately to pay for the cleaners. In only one market, Harper, did the local LMA appear to be using fees for the improvement of market facilities. There, concrete tables were being constructed in a market hall that did not have tables.

3.3.2 Liberia Produce Marketing Corporation (LPMC)

The Liberia Produce Marketing Corporation (LPMC) is responsible for assisting farmers in the production and marketing of cocoa and coffee. Currently, it collects and processes cocoa from the farmers for export. The 2006 exports were about 3,000 tons against a domestic production capacity of approximately 8,000 tons. The main market is Western Europe and CIF price is about US\$1,600 per ton. Currently, coffee exports are negligible but LPMC is planning to expand exports in 2007, given favorable world market prices.

According to the CFSNS, about 30% percent of rural households are involved in cash crop production including rubber, cacao and coffee. Cacao production is particularly important in Bong, Lofa, Nimba, and Grand Gedeh.

The farm gate price of cocoa in 2006 was US\$0.65 per kg for best grade and US\$0.32 per kg for sub-grade quality. LPMC commission is US\$0.065 per kg and the transportation cost is US\$ 0.08 per kg. The total delivered cost in Monrovia is US\$0.80 per kg for best grade and US\$0.47 per kg for sub-grade.

The main constraints identified by LPMC were lack of finances to provide extension services to the farmers that could increase both the quality and volume of cocoa production, provision of handling and operational storage capacity to address humidity and mould issues, and equipment such as scales and meters to monitor moisture content. Inaccessibility of markets particularly in the rainy season due to closure of roads is a major limitation since cocoa is harvested only once a year—August—and on farm processing time is about two months. Lack of access translates into significant losses in the marketing of cocoa produce.

3.4 Types of Markets

3.4.1 Weekly Markets

Approximately two-thirds of the markets identified meet once a week on a set day or weekly. Sales in weekly markets in rural communities are both wholesale and retail. The weekly markets held between Monday and Saturday draw three major categories of traders:

- 1) **Producers** from the surrounding or catchments area bring their produce for sale, most often to wholesalers (bulking intermediaries). The producers tend not to be full-time market traders but participate in the market only when they have produce to sell or have urgent needs for cash or for items they don't themselves produce.
- 2) The **wholesalers**, often from Monrovia, buy from the producers outside the market place. The transactions between the producers and bulking-intermediaries occur on the edge of the market place or “in the bush”. The wholesalers often build “customer” relationships with the producers, contracting in advance for their produce and, in some cases, providing them with inputs such as seeds and chemicals. Because the produce must be head-loaded from the farm to the market, these transactions appear to occur at the end or nearest point on the motor road reached by the producers. If there are not enough household members to head load the produce, the producer may hire people for this chore.

- 3) **Retailers** (itinerant traders) sell dry and imported goods, primarily to the producers. These traders usually travel to regular market circuits around a central point, e.g. Totota or Ganta. Farmers use the cash from their sales to the wholesalers to buy basic needs, e.g. salt, matches, clothing, etc. from the retailers in the market. The disposable cash income of farm households depends upon sales of farm produce which may be sold infrequently and in small quantities.

As indicated earlier, market cycles have developed around several centers, especially in Bong, Nimba, and Lofa. The Totota cycle in Bong County developed in the late 1950s/early 60s as improvements in the road network made it possible to travel to Monrovia within the same day. The markets are located along the main highway, approximately 7 miles apart, or the minimal taxi ride distance which cost 25 cents in 1970 (Handwerker 1972: 251). Totota became the residence of a number of traders, mostly selling imported or dry goods, who visited a different market each day of the week.

3.4.2 Daily Markets

The daily markets, approximately one-third of identified markets, are not simply weekly markets which meet more frequently, but have their own distinctive function. The sellers in the daily markets are usually full-time traders.

The daily markets, referred to as community or neighborhood markets, found in the larger urban centers, e.g. Gbarnga and Ganta, and in the neighborhoods of Monrovia, function primarily as retail markets, selling produce to a non-food producing population.

Some daily town markets, e.g. Voinjama, also host a weekly market in the same market-place. While occurring at the same time and in the same location, the two retain their different functions.

3.4.3 Terminal Markets

The Greater Monrovia markets serve a non-food producing population, most of whom must make daily food purchases because of little or no access to refrigeration or other storage facilities. Prior to the war, the Waterside and Rally Time markets in central Monrovia served as the major distribution points for produce coming into Monrovia from rural Liberia and Guinea. At these distribution points, the wholesalers or "bulking intermediaries" sell produce to the "Gobachop" or bulk-breaking intermediaries who then distribute produce to the neighborhood markets in Monrovia. During the civil war, Waterside and Rally Time were replaced by the "Gobachop" market at Red Light and the two "Kuwait" markets at Duala which now function as both wholesale and retail markets. The shift probably occurred because of the location of these markets on the outskirts of Monrovia near the front-line that encircled Monrovia during much of the conflict.

3.4.4 Cluster Markets

Cluster markets are smaller in number of sellers and commodities sold than the daily neighborhood or town markets. The markets may specialize in certain commodities such as fresh fruits and vegetables, fish, shrimps and meat, or prepared foods and snacks. In Monrovia, these clusters situated near supermarkets, often cater to middle and high income earners. The cluster markets may also be found in labour camps of concessions, main streets of upcountry towns, intersections of major roads, gasoline stations, government offices, etc.

3.4.5 Street Vendors or Hawkers

Especially in Monrovia, street vendors or hawkers are common. Their numbers seem to have increased significantly during the civil conflict and its aftermath, perhaps because entry requires very small amounts of capital. Because they move about, they pay no market fees. The majority of the sellers are women or girls, walking around with trays of oranges, bananas, groundnuts, plantain chips, etc. On occasion they may sit in front of office buildings or stores. Initially, the commodities marketed were mainly limited to fruits and groundnuts, but now, the number of sellers as well as the range of commodities has increased. Another category of street vendors are those who prepare food, e.g. roasted

meat or cassava, on coal pots in front of stores and offices. Cooler chests are filled with cold water, frozen koolaid, and soft drinks.

The “wheelbarrow boys” navigate wheelbarrows through the streets. These are mostly young men who sell bread, imported foodstuffs such as biscuits, cassettes and CDs. Dry goods, including used clothing and jewelry, are also sold by these vendors. In addition to the sale of commodities from wheelbarrows, the wheelbarrow is now common in market places, being hired to transport goods from place to place. There is a national wheelbarrow association which registers and numbers many of the wheelbarrows.

3.4.6 Road Side Markets

Produce is often sold from road side markets, usually at farm villages or in smaller communities, often some distance from a market. Farmers and hunters display their perishable produce or meat by the road.

3.5 Types of Marketers

Sellers can be categorized as:

- 1) **Producers:** Farmers who sell produce, most often in rural weekly markets.
- 2) **Wholesalers** (Bulking intermediaries): Traders who bulk commodities bought from producers and transport to other markets, especially markets in Monrovia.
- 3) **“Gobachop”** (Bulk-breaking intermediaries): Traders who buy from the wholesalers and sell in other markets to retailers.
- 4) **Retailers:** Traders who sell to consumers

In all the markets surveyed, female traders significantly outnumbered males. The estimates from the surveyed markets based on observation ranged from 65% to 98% (with an average of 86%).

Obtaining information on the characteristics of sellers was beyond the scope of the market review. Information, however, is available from earlier research that is probably still applicable (Handwerker 1972, Conteh et al 1982). According to these studies, most market sellers worked on their own. Any assistance they received came primarily from their family or household, especially children. Helpers were responsible for carrying loads of goods to and from marketing sites, watching the market in the absence of the seller, fetching water, and other chores (Handwerker 1972:282). At that time, the wholesalers sometimes hired boys or young men to search for possible sellers in the bush. Boys and young men were also hired to collect fruit and to carry bags of produce to the road.

3.5.1 Producers

Producers are the core of the weekly markets. Depending on the commodities and the quantities, they are either wholesalers or retailers. For instance, a bunch of plantain or bananas or a five gallon container of palm oil can be sold wholesale by a producer, while another producer could elect to retail the plantain and banana by “hand” and the palm oil by gallon or bottle. Producers may also sell retail in the rural daily markets. They are usually not full-time marketers.

3.5.2 Wholesalers

The two categories of wholesalers identified are the “middlemen” or bulking intermediaries and the hackers or bulk-breaking intermediaries (Handwerker 1972). The wholesalers procure their produce in the weekly markets as buyers and transport the produce to the wholesale markets of Gobachop in Paynesville, or Kuwait in Duala (both in the outskirts of Greater Monrovia) or to rural urban centers, e.g. Gbarnga, Ganta. Wholesalers market their produce, either through cash sales or by extending credit to the hackers (Gobachop) for two to five days at a higher price. The hackers (bulk-breaking intermediaries) then sell the produce to retailers in the other markets of Greater Monrovia.

3.5.3 Retailers

The retailers are found in all the markets. In the weekly markets, the itinerant traders who sell imported or dry goods are the full-time retailers. They may have a base in a daily market, e.g. Ganta, where they sell on some days, going to weekly markets, e.g. Flumpa or Saclapea, on other days. Another category of itinerant retailers are those who sell processed or prepared foods, e.g. bread, fritters or doughnuts.

3.5.4 Buyers

The market review did not attempt to obtain information on buyers. What was striking in several of the daily rural markets, however, was the small number of buyers. The marketers frequently commented that "times were hard." Outside Monrovia, the limited number of buyers may be attributed to the absence of a substantial non-food producing population. Simply put, while there are many sellers or traders, in part because of the lack of other viable livelihoods, there are still relatively few buyers with the need and the cash for market purchases.

The socio-economic status of a buyer influences where and how much is purchased. The daily urban markets are used primarily by low or middle income people, especially to buy local foodstuffs. Two factors affect purchases. First is the amount of cash available.

As many people rely on low or irregular incomes, cash availability is limited. Second, most households must make daily food purchases because they have no way to store food in the absence of regular electricity, refrigerators and freezers. Many buyers utilize markets that are within walking distance of their residence, or in the case of Monrovia, are located near points with easy access to public transportation. Buyers with bigger and more reliable incomes, with access to private transportation, and with refrigeration may buy less frequently and may go to markets where they believe prices or quality is best.

In Monrovia, there are several specialized markets which are utilized by middle or upper income people, e.g. the Fish Market on Tubman Blvd. in Sinkor or the cluster of sellers on Benson and Mechlin Streets, adjacent to a supermarket. Wealthier buyers, including the expatriate community, make many of their purchases at the several supermarkets in Monrovia where they often purchase imported fresh produce and eggs rather than local produce.

4.1 Transportation

The transportation sub-sector, greatly affected by the civil war, is comprised of seaports mainly for transporting imports and exports, rail roads for transporting iron ore from mining sites to export points, and road transport for the movement of goods and services throughout the country and to and from neighboring countries. From the food security point of view, the road transport component was closely examined since it is the principal means by which food commodities are transported from surplus areas to deficit areas. The utilization of the rail road connecting Monrovia to a mining town in Bong County (Bong Mines) which is presently being used for both industrial and commercial purposes is presented as a case study in annex 6.

4.1.1 Seaports

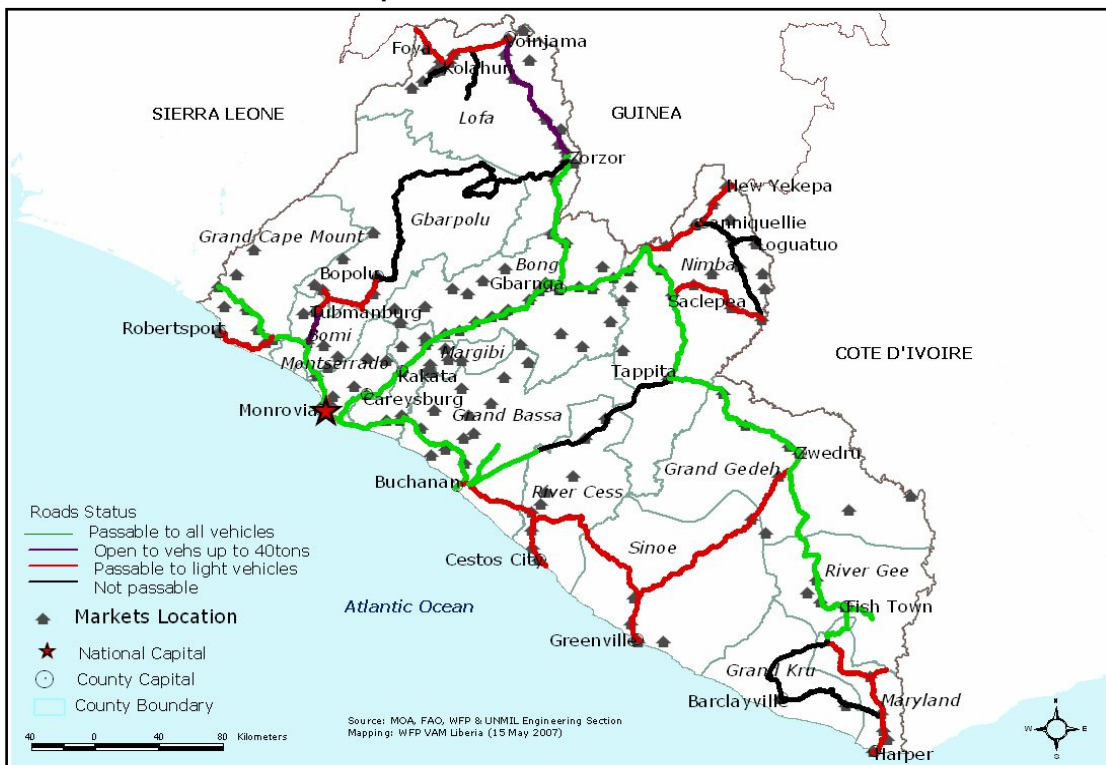
There are four main seaports in Liberia: Harper, Buchanan, Greenville and the Freeport of Monrovia. The Freeport is the most active, where most of the imported commodities arrive. The other three ports, mainly used for exporting logs, have limited handling capacity, forcing vessels calling at these ports to provide their own handling equipment.

Major constraints at the Freeport include channel shrinkage, blockage of berths by capsized vessels, limited and outmoded discharging and handling equipment, and heavy reliance on manual labour.

4.1.2 Roads and Transportation Costs

There are approximately 650 kilometres of paved and 5,600 kilometres of unpaved primary, secondary and feeder roads in Liberia. In addition, there is an estimated 7,800 kilometers of primarily logging roads, most of which are now impassable. The condition of most road beds and many bridges deteriorated significantly during the years of the conflict, necessitating major repairs and/or reconditioning. Farm to market access is difficult and parts of the country are isolated during the rainy season, May to November, when many of the unpaved roads become impassable.

Map 1: Liberia's Main Road Network



Source: UNMIL: Status of Roads and Bridges in Liberia, 11 April 2007

The main road networks extend from Monrovia in three major spurs. To the west, a paved road, in relatively good condition, extends through Bomi and Grand Cape Mount to the Sierra Leonean border. To the east, the paved road passes through Roberts International Airport, Harbel, to Buchanan.

To the north, the paved road passes through Kakata and Gbarnga, terminating in Ganta where the pavement ends. At Gbarnga, the road splits and one spur extends north to Lofa County and the Guinean and Sierra Leonean borders. The other spur continues to Ganta where the road again branches. One branch continues through Saniquellie to the former LAMCO concession at Yekepa. The other branch goes toward the south-east, passing through Nimba, Grand Gedeh, River Gee, and Maryland, ending at Harper. On that branch, a few miles from Zwedru the road again branches to Greenville, Sinoe County. In addition to these main arteries there are numerous feeder roads in varying condition.

4.1.3 Rail Roads

Cessation of iron ore mining in 1990 halted utilization of the rail network. Approximately 500 km of track had linked iron mines in Grand Cape Mount, Bong, and Nimba Counties to the ports of Monrovia and Buchanan. During the conflict, the tracks and beds of the railroads were heavily looted. The line between Bong Mines and Monrovia has been reactivated by a private company, the Geoservices, which provides railway service for some passengers and light cargo (see annex 6). The line between Yekepa (Nimba) and Buchanan will be rehabilitated to accommodate mining activities of Mittal Steel.

4.1.4 Trucking Capacity

There are about 20-30 trucking companies in Monrovia with a total trucking capacity of less than 2000 metric tons. Commercial truck carrying capacity ranges from 5-20mt. Most trucks imported into Liberia are secondhand, with an average age of 8-10 years.

During the dry season, commercial transporters operate throughout the country with the exception of River Gee, Maryland and Grand Kru. These counties are generally served by transporters from Cote d'Ivoire. Foreign registered trucks are allowed to operate in Liberia provided that they have the ECOWAS permit. Particularly common in Monrovia are trucks from Guinea.

Commercial transportation costs vary by season and type of road. On average, transportation costs on paved roads are US\$0.40/mt/km and US\$0.56/mt/km on unpaved roads. Costs on the paved roads remain generally the same for both wet and dry seasons, but may be more than double during the wet season for travel on the unpaved roads.

The main constraints experienced by the transporters are exceptionally high fuel prices, poor availability of spare-parts, and road conditions resulting in excessive wear and tear.

4.1.5 Commercial Vehicles

Commercial transport is provided by a range of taxis, vans or mini-buses, buses, pickups, and trucks, most of which are used imports. During the conflict, vehicles of all types were looted, converted to private use by fighters, sold in neighboring countries, or recklessly damaged. The existing fleet of vehicles is relatively old and in poor condition. Vehicles deteriorate rapidly because of the poor road conditions and overloading. Recently, a new type of commercial transport has developed, starting first in Nimba County. Motorcycles provide transport to one or two passengers. Known as "kpeng, kpeng," the motorcycles have now spread to Monrovia, offering service to locations off the main roads.

During the review, transportation – specifically the lack of access, deplorable road conditions, and high transportation costs – was identified as the most important constraint affecting producers and traders alike. Owners of commercial vehicles find it uneconomical and risky to allow their vehicles to ply the existing roads.

Although fares are set by the Ministry of Transport and the Drivers & Transport Union, in reality outside Monrovia, the limited commercial vehicles that ply the roads are able to charge whatever the traffic will bear for passengers and commodities. Interviews with traders of locally produced commodities revealed that the transport cost of a given quantity of commodity often exceeds its market value, particularly in the rainy season.

Figure 14 in section 8.4 provides information gathered in the CFSNS on the cost of transport and the variation in fare between dry and rainy season.

The south-eastern region of Grand Gedeh, River Gee, Sinoe, Grand Kru and Maryland appears to be the most affected by the difficult movement of commodities and people. People often walk long distances to the nearest roads, markets, and services. Young adults are often hired as porters to carry commodities to the markets, especially in Grand Kru.

4.1.6 Communication

The recent expansion of the cellular phone networks throughout Liberia has opened up new possibilities for traders. Of the surveyed markets, only two did not have access to the cellular network: Barclayville and Fishtown. In Bopolu there was intermittent access from certain locations, including one near the market. The impact of the cellular network on market trading needs to be investigated. It is evident, however, that the traders are using the network to obtain information on availability, location, and prices of goods.

4.2 Marketing Infrastructure

4.2.1 Market Structures

Market places occur either in structures or in open space. Market structures are of several types. Some are roofed buildings with concrete floors and walls, while others lack walls.

These structures may have tables that are concrete and permanent or wooden and movable. Sellers in markets without walls must store commodities elsewhere at night.

In market places, sellers of the same commodity tend to cluster together. Most of the daily markets have external extensions that include roofed structures or tables. These are used most often by those selling dry goods that cannot be appropriately displayed on the tables inside the market structure, or where there is not sufficient space within the market. On those days when the rural daily markets have a simultaneous weekly market, the site will also include sellers on mats on the open ground.

Open space markets are 1) those with no shelters in which sellers provide their own mats and sell from the ground, 2) those where open space is encircled, wholly or partially by permanent structures (thatch or zinc roofs, wooden-pole frames), and 3) markets with crudely constructed tables that may have a "roof". The open space markets are usually weekly markets. Sellers construct the structures or shelters themselves and are regarded as "owning them". Traders who regularly move from one market to another in the weekly cycle may have a structure at more than one market (Handwerker 1972: 243).

Box 1: Why Market Buildings are not Utilized

In several locations around the country, market buildings were observed that were either not being used by traders or were being used by children as playgrounds, or by hawkers of CDs and videos, used clothing ("doka fleh"), etc. The reasons for the underutilization of market halls are not evident.

One possibility considered was that the sellers outside the market halls might not be paying registration fees. Responses to this inquiry were not consistent, with a preliminary conclusion that payment of fees is not the main factor.

In some cases, the location of the market hall appears to be a factor. Roadside markets appear to function best when they are located "on the road" where buyers can quickly stop and make purchases. An example of this is the market hall at Gbokonimah near Totota. Historically, there was a roadside market on the right side of Gbarnga-Totota road where traders sold a variety of produce, including fruits, bitterballs, peppers, etc. Buyers were travelers in private and commercial vehicles. In the 1980s a market hall was constructed on a hill on the opposite side of the main highway, accessible by a short road. After its completion, the hall sat empty for some time while the roadside market continued. Eventually authorities banned the roadside market to force traders to use the market hall. Although there were a few traders using the market hall, there seem to have been fewer buyers. During the civil conflict, the traders returned to the roadside to what was then known as the "Charles Taylor supermarket" as he was reported to have frequently stopped to buy all the produce. The market hall has recently been renovated by an international agency.

Another explanation may be the commitment to trading at a particular location by sellers and second, establishing "security of ownership". Those who build the crudely constructed tables with thatch or zinc roofs are most likely to be sellers who frequent the same market on a regular basis. Having their own structure guarantees their tenure in that spot. On the other hand, spots in an open market hall with no permanent tables provide little security. The traders can not be sure of how much space each will have, as the number of traders varies. This is especially true of weekly markets. It is likely that many of those selling from mats on the ground come intermittently. For them, there is little incentive to invest in constructing tables or paying for a table in the hall.

The regularity of market visits and a commitment to trading are major factors in the presence of shelters among sellers. Traders do not invest the effort or money in constructing a table or permanent shelter unless trading in a particular site takes place regularly and trading forms the major basis for livelihood (Handwerker 1972:244).

The land on which market places are located may be either government or privately-owned land. In Tubmanburg, the Central Market is government-owned, while the two smaller markets in the city are on privately-owned land, with rent being paid to the owner. Several of the markets in Monrovia, e.g. Joe Bar Old Road, are on private land.

4.2.2 Storage Facilities

Storage facilities are critical for wholesalers and retailers. Prices may be lowered in order to sell before produce spoils. Most imported goods are purchased in Monrovia and transported elsewhere in the country. The shortage of storage facilities outside Monrovia limits purchases in Monrovia, meaning more trips to replenish stocks, and, probably, increasing the price of goods. The itinerant traders are also constrained as their stocks are limited to what they can transport from market to market or store in their residences.

The Liberian informal food marketing sub-sector generally lacks storage facilities. Of the 21 markets visited, only 9 reported having storage facilities. These storage facilities referred to as warehouses are basically large rooms owned and operated by private individuals where commodities of all kinds are stored overnight. They lack ventilation and pallets. The costs for storage depend on the quantity of commodities stored. The cost of storing a bag per night averaged L\$5. The areas around Red Light in Paynesville and Duala on Bushrod Island have a number of warehouses, including several at Red Light operated by Guineans that store dried peppers and groundnuts.

Cold storage was provided prior to the conflict by the Mesurado Fishing Company, which operated fish depots around the country. That function is now being developed by the West African Fishing Company. Access to cold storage facilities, especially at the bigger urban markets, would allow sellers to store perishable items overnight.

4.2.3 Processing Capacities

Processing is extremely limited in the informal food marketing sub-sector. The utilization of seasonal produce, e.g. mangos, pineapples, is also limited because of lack of processing.

In most cases, traditional processing techniques are applied: Fish is most often smoked and dried. Cassava is processed into fufu, gari, etc. Peppers are frequently dried, mostly before their purchase in Guinea.

Prior to the civil war, rice mills were becoming more common throughout Liberia. Most were privately owned and were often located near markets. The mills were popular because considerable labour in processing rice was saved by women and there were fewer losses.

4.2.4 Credit Facilities

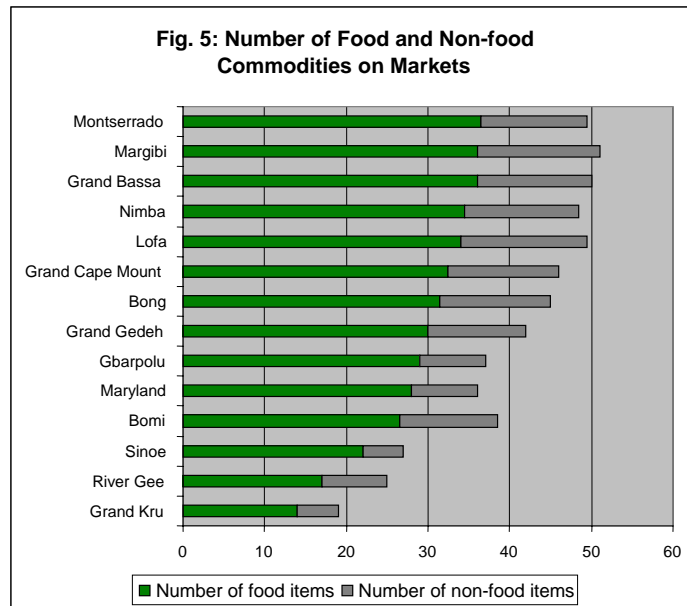
Most marketers indicated that there were no credit facilities available. In several markets, *Susu* clubs had been organized. In the Gbarnga market, the traders mentioned micro-credit provided by Liberty Finance and DEN-L. Wholesalers may provide credit to retailers and to producers in the form of farm inputs. The lack of credit facilities limits the ability to procure goods. In some cases, retailers may be forced to sell at lower prices in order to get the necessary cash to replenish their stocks.

A special case was observed near the Handii market in Bong County, where a group of youth formed a *Susu* club to which each of them contributed 5 gallons of palm oil and some cash on a weekly basis. One of them received the oil and cash each week to sell the palm oil in Monrovia (see annex 6).

Currently the number of banks outside Greater Monrovia is limited. The Central Bank has established branches in several of the counties that function primarily to cash government payroll checks. Commercial banks, e.g. ECOBANK and Liberian Bank for Development and Investment (LBDI), have opened branches in Ganta and Harbel and plan on opening additional branches. The commercial banks, however, are perceived as not “user friendly” to petty traders.

5.1 Food Commodities

The food commodities sold in Liberian markets are a function of the Liberian dietary patterns and methods of food preparation. The basic Liberian diet consists of either rice, cassava, or other tubers and a “soup” or stew made from greens or palm nuts. “Pepper” or “clear water soup,” most often consumed with cassava products (fufu, dumboy, or gbegbi) is made from fish and meat and highly seasoned with pepper. Palm butter, especially popular in south-eastern Liberia, is made from palm nuts. Commonly-used greens and vegetables include cassava leaf, potato greens, palaver sauce, okra, bitterballs, etc. Cassava leaf must be pounded in the mortar or ground before cooking. In rural markets, the leaf is most often sold. In urban markets, cassava leaf is often sold already ground (using a meat grinder). Greens are cooked with palm or other vegetable oil. All soups or stews tend to be heavily seasoned with fresh or dried pepper.



Many Liberians do not consider themselves to have eaten during a day if they have not had at least one meal of rice. Cassava is the second most commonly consumed staple and is preferred in some parts of the country. Food preferences and preparation methods have been influenced by the experience of Liberians as refugees in neighboring countries or in the U.S. Whatever the socioeconomic level, the basic ingredients are much the same. The differences are in the quantity (especially rice) and the quality of the stew or soup. Higher income households will prepare stew or soup that includes considerable quantities of fish, poultry, or meat. Lower income households will prepare stew that has relatively more oil (for calories and to make the soup go further), little meat or fish, and fewer greens. For those with little money, a meal may consist of rice with palm oil.

Food commodities frequently sold in Liberian markets can be grouped into several categories:

1. Grains: locally-produced and imported rice
2. Tubers/roots: mainly locally produced
3. Pulses: mainly imported from Guinea
4. Vegetables: mainly locally produced
5. Fruits: locally produced and imported
6. Palm oil: locally produced (“red” palm, palm kernel, coconut)
7. Other oil: Imported (vegetable, corn, etc.)
8. Pepper: fresh locally produced, dried imported from Guinea
9. Dried fish (in some markets fresh and/or frozen fish)
10. Dried bush meat (in some markets: fresh meat such as chicken, beef, pork and bush meat)
11. Canned products (e.g. milk)
12. Condiments (salt, «manpo», maggi cubes, etc.)

Four factors influence the quantity and diversity of food commodities that are sold at a local market: (i) local demand and purchasing power which is determined by population density and predominant livelihood activities, (ii) agricultural production capacities in the area where the market is located; (iii) condition of road network (main roads and feeder roads) and availability of reliable means of transport, and (iv) the level to which the

produce is perishable. Greens such as cassava leaf and potato greens perish within a day or less. Other vegetables such as eggplant and 'bitterballs' last longer.

At the other extreme, beans and dried pepper have a long shelf-life. Those items which are highly perishable cannot be transported long distances/time before arriving at market.

During the market visits, the availability of 41 food commodities was assessed. On average, 30 food commodities were found in the markets, ranging from only 14 in Grand Kru to 37 in Montserrado. Generally, fewer food commodities are available in the south-east and in Bomi and Gbarpolu counties in the northwest.

Daily markets visited outside Monrovia averaged 32 of the listed food items, compared to only 26 in weekly markets.

Rice was found in all 21 markets. **Imported rice** (butter rice and "sondone") dominated in 19 of the 21 markets – often in large quantities. Imported parboiled rice was found in only 7 of the surveyed markets.

Locally produced rice ("**country rice**") was found in 17 markets – except for Lofa and Montserrado in small quantities. No country rice was observed in Grand Kru, Sinoe and Maryland. The survey was done at the time of year when it is most likely that country rice will be available for sale.

Fresh **cassava** was found in all markets except for Grand Gedeh, River Gee and Sinoe. Large quantities were observed in Bong, Grand Bassa, Grand Cape Mount and Montserrado. Processed cassava – fufu and/or farina – was available everywhere with the exception of River Gee.

Plantain has become more important in Liberian diets, probably because of the exposure of refugees to preparation methods in other West African countries. It was found in all counties except for Grand Kru. **Yams**, not a major item in Liberian diets and not commonly cultivated, were found only in markets in Montserrado and Nimba.

Groundnuts, though grown locally in some parts of Liberia, are mainly imported from Guinea. They were found in all surveyed markets except Grand Kru. Similarly **pulses**, mostly imported from Guinea, were found in all markets with the exceptions of Gbarpolu, Grand Kru and River Gee.

Bush meat, mainly dried, was available in 13 of the 21 markets. It was not present in the markets surveyed in Bomi, Grand Kru, Maryland and Sinoe. The meat mostly comes from forest areas such as Rivercess, Sinoe, Grand Gedeh, and Gbarpolu. The sale of several species is illegal but there is a considerable volume estimated at US\$78 million per year (BMS).

Dried fish was found in all markets, while **fresh fish** was available in 18 markets. Most of the fish in the interior derives from fresh water sources. Frozen fish is purchased in Monrovia from several companies. Dried fish most often comes from *Kru* or *Fanti* fishing communities located along the Liberian coast from Cape Mount to Maryland. Most common is the small fish known as "bony".

Eggs were found in 10 and **chicken meat** in 14 of the visited markets, mainly in Central Liberia and Lofa. **Beef** was found in Montserrado, Margibi, Lofa and Grand Gedeh. Beef and pork are found primarily in urban markets. Pigs are raised locally, while most cattle are imported from savannah countries to the north.

Fresh fruits were found in 18 out of 21 markets and **vegetables**, mainly leafy greens, were found everywhere except River Gee.

Important condiments include sesame, fresh and dried peppers, and onions. Onions are most often imported. **Dried pepper** comes primarily from Guinea, passing primarily through Ganta to Monrovia and elsewhere. It was found in all markets visited.

Palm oil was also found in all markets, except Fish town (River Gee) and Barclayville (Grand Kru). Palm oil or "red" oil is the most common locally produced oil. Palm kernel oil and coconut oil are rarely available. Other vegetable oil is imported.

Prepared foods may be sold, most frequently some kind of fried dough such as doughnuts or fritters. Sticks of roasted meat or roast cassava and plantain may also be sold. *Kool-aid* drinks packaged in small plastic bags are common.

Box 2: Country Rice versus Imported Rice

At the present time, most Liberian households buy rice at some point during the year. Rice production is still considerably lower than in pre-war years and few households in 2006 were likely to have a surplus of rice that could be sold. In any case, most Liberian farmers prefer not to sell their rice as it is their basic food and some must be kept for seed rice. Farmers sell rice most often when they need cash and that cash cannot be obtained from alternatives sources. As one woman expressed it, she sells country rice “when I’m jammed”. On that day she was selling rice in order to get cash to pay laborers to brush her farm. A major constraint affecting the sale of country rice is the time required for processing it. The rice has to be dried, beaten, and fanned for sale. The labour inputs for this chore are considerable for rural women in the absence of milling facilities.

The availability of country rice on markets is highest in the several months following harvest. The long-standing dilemma for farmers has been that they tend to sell rice soon after the harvest when the price is lowest and have to purchase rice in the rainy season when the price is highest.

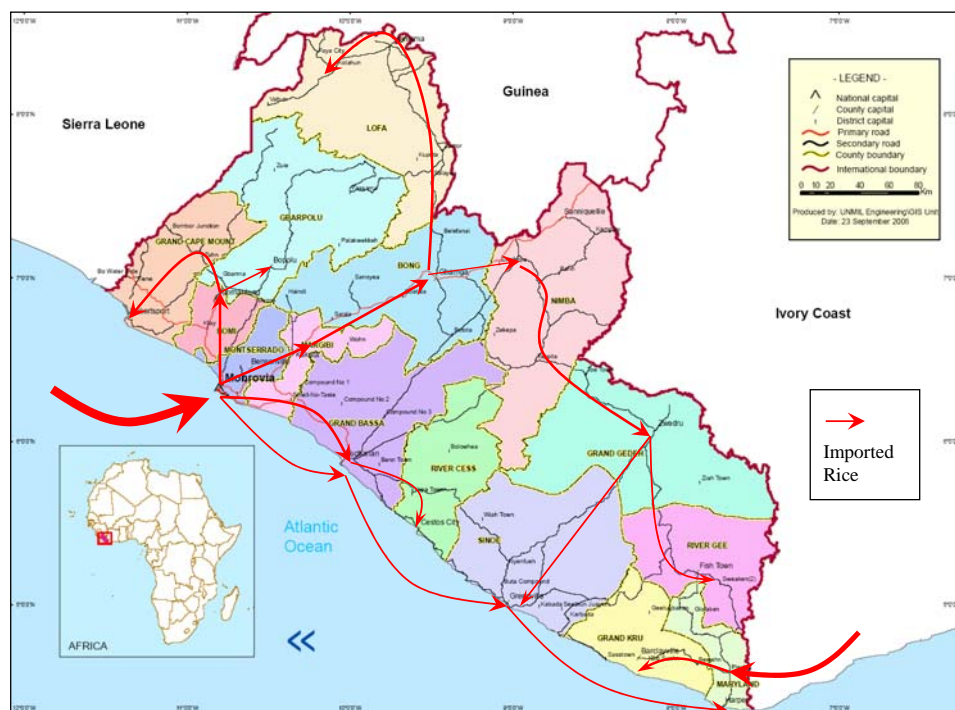
For markets outside Monrovia, the supply of imported rice is determined by two main factors. First is its availability in Monrovia, the point of entry, or in the south-east, its availability in Cote d’Ivoire. The second supply factor is the availability of transport. Transport is most difficult during the rainy season and to the south-eastern counties. The demand for imported rice is lowest in rural Liberia in the months following the harvest and highest late in the rainy season prior to the harvest. Hence, the demand for imported rice is highest in rural Liberia at the time when supplying it is most difficult. For the counties in the south-east, the government has recently tried to make more imported rice available by ocean shipment to the ports of Greenville and Harper. Grand Kru receives most of its imported rice by small boat or canoe from Harper or Monrovia.

The consumer preference among urban buyers is usually for imported rice, with frequent claims that “country” rice is rocky. Furthermore, many urban cooks are not familiar with its preparation.

5.1.1 Sources of Food Commodities

The origin of **imported rice** for most counties is Monrovia, the entry point. Maryland and Grand Kru in the south-east depend on Cote d’Ivoire for imported rice. Most of the parboiled rice sold in Margibi and Grand Bassa is imported by the Firestone Rubber Plantation at Harbel for employees who receive a monthly allotment of imported rice as part of their compensation.

Map 2: Trade Flows of Imported Rice



Country rice is mainly produced and sold within the same county; the exceptions are Montserrado, Margibi, Bong and Bomi where country rice from Lofa County was being sold. This is an indication that Lofa County – originally the ‘bread basket’ of Liberia which was heavily affected by the most recent civil strife and displacements – is starting to recover.

Cassava is mainly produced within the same county, with the exception of Margibi, where some originated from neighboring Grand Bassa and Montserrado, where cassava comes from Grand Bassa and Bong. A similar pattern was observed for *eddoe* (taro).

Plantains are produced within the same county; again the exceptions are Margibi and Montserrado, where they originate from Grand Bassa and Nimba. Plantains found in Sinoe market came from Grand Kru, though no plantains were found in the markets of Grand Kru.

In approximately half of the markets visited, **dried fish** originated from within the county, while in the remaining ones, fish came from another county with a coastline. Fish in Bomi and Bong originated from Grand Cape Mount, dried fish in Grand Gedeh and Nimba from Sinoe, and fish in River Gee from Maryland. Imported fish from Guinea was found on markets in Lofa and Nimba.

Bush meat mainly originates from the highly forested, counties in the interior. Bush meat found in Bomi came from Lofa and Gbarpolu. Bush meat from Lofa was also found in Bong County. Grand Bassa provides bush meat to Margibi and Montserrado. The biggest supplier is Grand Gedeh, which supplies markets in Nimba, Montserrado, Grand Bassa and Margibi. **All dried beans** – when available - were imported from Guinea, sometimes via Monrovia. The exception is Maryland, where beans were imported from Cote d’Ivoire. The same pattern was observed for **dried pepper**. **Palm oil** is mostly produced within the same county.

5.1.2 Food Prices (January 2007)

During the market visits in January 2007, prices for 17 food commodities were assessed when they were available. The estimation is based on the average of three samples per market which were weighed and recalculated into kilograms for comparison. The objective was to assess regional price differences for staple food commodities that are important for a typical Liberian diet. All prices provided below are stated per kilogram.

The market price for **imported butter rice** ranged from L\$31 in Montserrado to L\$46 in Maryland. **Sodone rice** ranged from L\$29 in Montserrado to L\$50 in Grand Kru and River Gee, where no other imported rice was found. The prices reflect transportation: the closer to Monrovia (Montserrado), the cheaper imported rice is. Prices are particularly high in the south-east, which is regularly cut-off from the rest of the country during the rainy season.

On the contrary, the price of ‘**country**’ rice depends on levels of production and harvest season. It was cheapest in Lofa (L\$28), where the main harvest season is around November to December. It was most expensive in Grand Gedeh, where rice reserves from the previous harvest were already starting to run out (L\$40). It was not found in all other counties of the south-east, namely Grand Kru, River Gee, Maryland and Sinoe. Country rice was also relatively expensive in Montserrado and Nimba at L\$36 per kg.

Bulgur wheat found on the markets, a food aid commodity which can be traded by beneficiaries for other products, is much cheaper compared to rice. It is often purchased by households that cannot afford rice. In most counties, prices ranged from L\$12 to L\$19 per kilogram. In Grand Kru and River Gee the costs of the same quantity was L\$29, explainable by the high transport costs. Bulgur was not found in Gbarpolu.

CSB or cornmeal, another food aid commodity, was found in two-thirds of the markets, at prices ranging from L\$30 in Lofa and L\$38 in Maryland to L\$60 in Grand Cape Mount. Prices are a function of the potential supply, e.g. the presence of refugee camps or areas of high return in the neighborhood of the market.

Cassava is relatively cheap in comparison to all other food commodities; the price ranges from L\$5 per kg in River Gee and Grand Kru to L\$14 in Montserrado. The high costs in Monrovia can be explained by the fact that it is not often grown locally and transport is relatively expensive due to its heavy weight.

Eddoes ranged from L\$20 in Lofa to L\$41 in Bomi, **plantain** from L\$16 in Lofa and Maryland to L\$37 in Gbarpolu.

Dried beans were cheapest in Nimba (L\$59) and Montserrado (L\$60), both entry-points for products from Guinea. They were most expensive in Grand Cape Mount and in the South East (around L\$80).

Dried bony fish is cheaper in the counties along the coast. Prices ranged from L\$138 in Sinoe to L\$295 in Gbarpolu in the North-West.

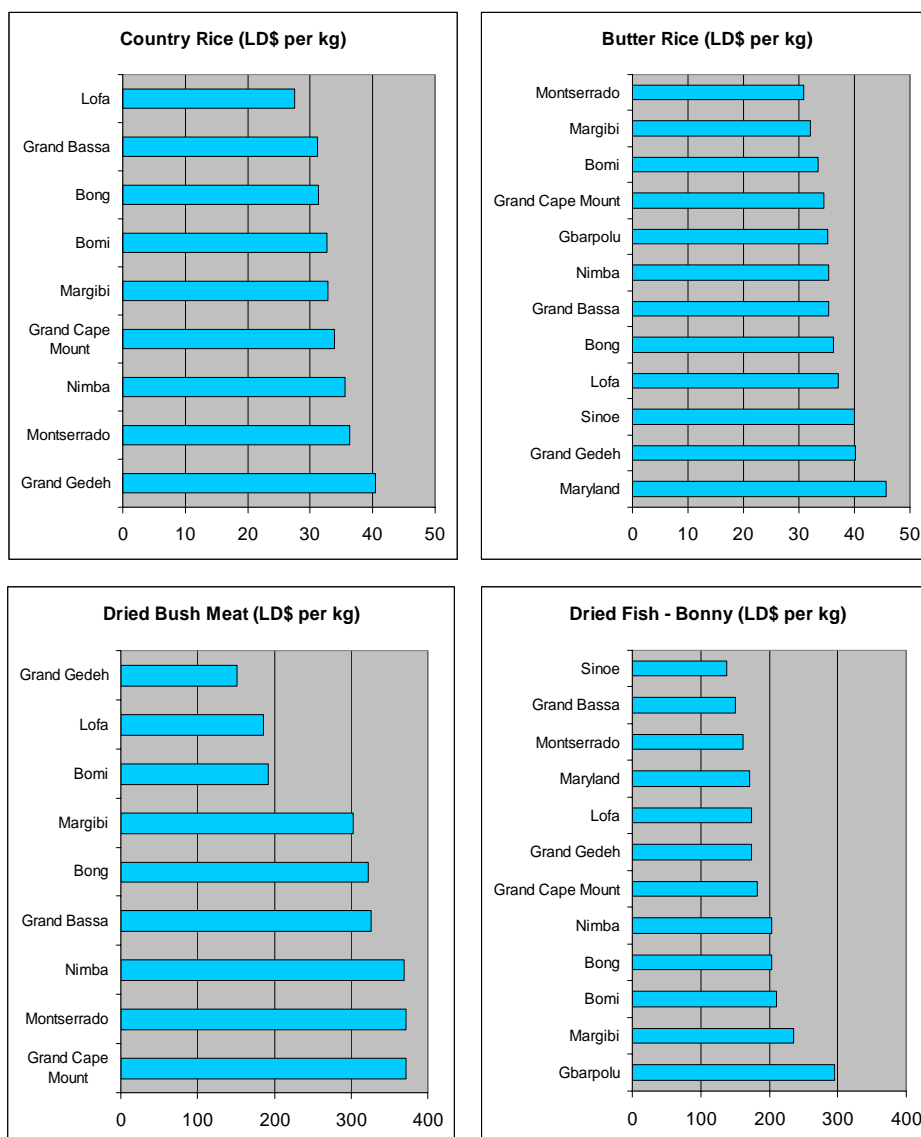
Dried bush meat is the cheapest in Grand Gedeh at L\$186 where it originates. Prices peak in Montserrado where households have to pay L\$372 for one kilogram.

Salt and **sugar** are most expensive in Grand Kru, River Gee and Sinoe, directly correlated with the transport costs to reach these remote locations. Salt costs approximately L\$60 compared to an average of L\$37 elsewhere. Sugar is as high as L\$125 compared to an average of L\$72.

Palm oil ranges from L\$50 to L\$70 across the country, but is more expensive in Lofa and Bong, at L\$110. **Imported vegetable oil** is cheapest in Montserrado (L\$74) and most expensive in Sinoe (L\$140).

Overall, the most expensive counties are Gbarpolu, Grand Kru and River Gee, due to their remote location and difficult access. These are also the counties that are highly vulnerable to food insecurity according to the CFSNS.

Fig. 6: Prices of Key Food Commodities by County



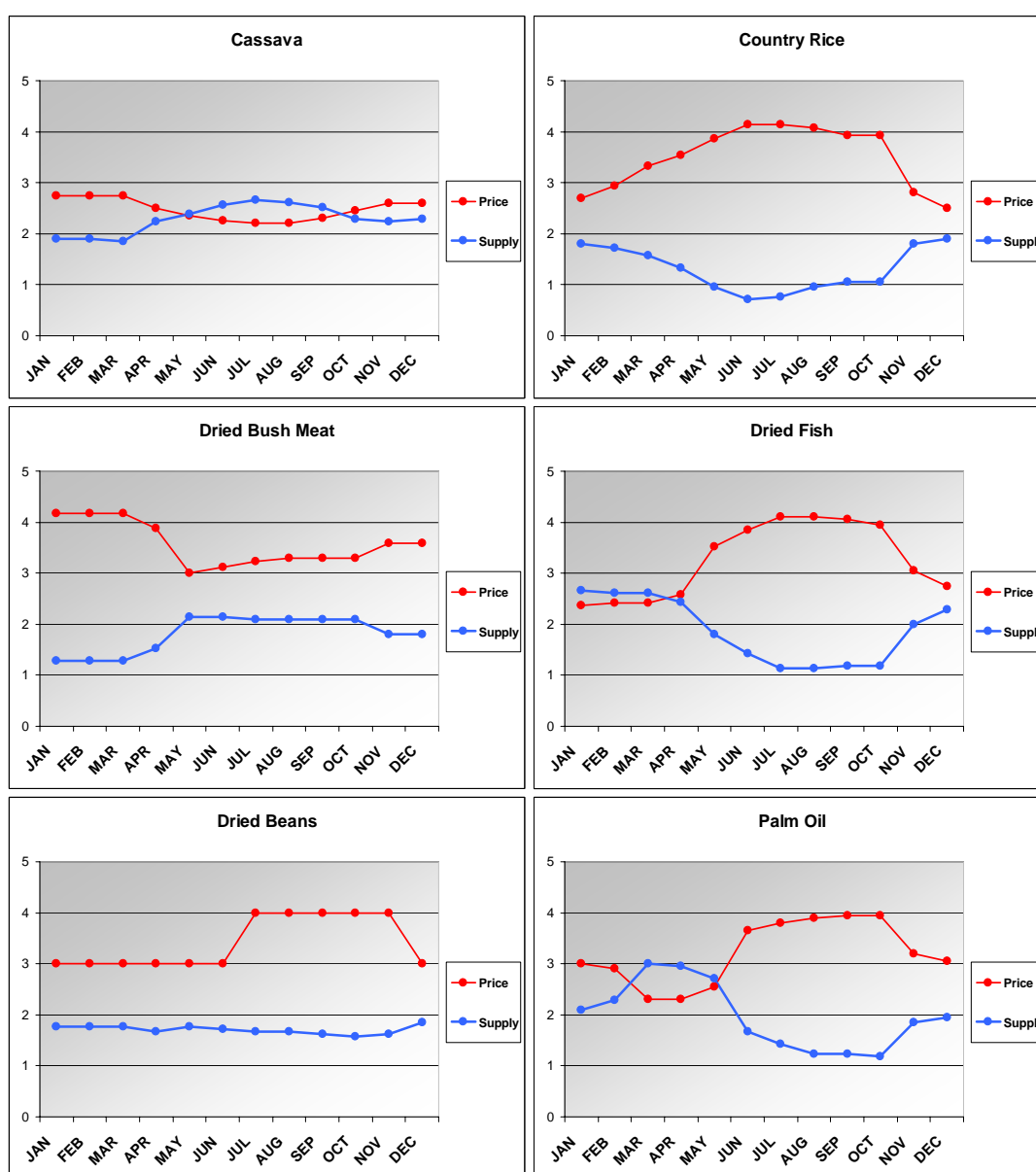
5.1.3 Seasonality of Supply and Prices

Using Participatory Rural Appraisal tools, seasonal calendars were developed to assess seasonal trends in supply and price of 9 food commodities over the past 12 months (January to December 2006) in qualitative terms. Table 6 presents the results, whereas "1" = low, "2" = medium, "3" = high and "4" = very high.

For most food commodities, market prices fall in line with seasonal availability which is determined by the agricultural cycle and physical accessibility. When assessing the average of all markets across the country, **country rice** was most expensive from April to October which corresponds with the lean season. From November to February availability was higher and prices slightly lower, although they were still perceived to be "high" though.

On average, **cassava** seems to be available throughout the year with a peak from June to August. This could be related to the fact that during this time, the demand is higher as country rice is not available. Cassava is less sensitive to price changes compared to country rice.

Fig. 7: Seasonality of Supply and Prices of Key Food Commodities



The season for **fishing** is December to April, when the price for dried fish is the lowest. Highest prices were reported for May to October. Within a given month the best time for fishing is during full moon.

Bush meat has its peak in the rainy season. Respondents of the focus group discussions explained that this is related to the fact that the animals cannot hear the hunters moving in the damp bush. Prices are also lowest during the rainy season.

Interestingly, the supply of **dried beans** is perceived to be “medium” throughout, while prices are higher in the rainy season, which could be related to higher transport costs.

Palm oil prices are lower during the dry season, in particular from March to May when the market is flooded with palm nuts. Prices are very high from June to October.

Table 6: Seasonality of Supply and Prices by Food Commodity*

		JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP	OCT	NOV	DEC
Country Rice	Price	3	3	3	4	4	4	4	4	4	4	3	3
	Supply	2	2	2	1	1	1	1	1	1	1	2	2
Cassava	Price	3	3	3	3	2	2	2	2	2	2	3	3
	Supply	2	2	2	2	2	3	3	3	3	2	2	2
Eddoe	Price	3	3	3	3	4	4	4	4	4	4	3	3
	Supply	2	2	2	2	1	1	1	1	1	1	2	2
Plantain	Price	3	3	3	3	3	4	4	4	4	4	3	3
	Supply	2	2	2	2	2	1	1	1	1	2	2	2
Dried beans	Price	3	3	3	3	3	3	4	4	4	4	4	3
	Supply	2	2	2	2	2	2	2	2	2	2	2	2
Dried fish	Price	2	2	2	3	4	4	4	4	4	4	3	3
	Supply	3	3	3	2	2	1	1	1	1	1	2	2
Bush meat	Price	4	4	4	4	3	3	3	3	3	3	4	4
	Supply	1	1	1	2	2	2	2	2	2	2	2	2
Dried pepper	Price	3	3	3	3	3	4	4	4	4	4	3	3
	Supply	2	2	2	2	2	2	2	2	2	2	2	2
Palm oil	Price	3	3	2	2	3	4	4	4	4	4	3	3
	Supply	2	2	3	3	3	2	1	1	1	1	2	2

* 1=low, 2=medium, 3=high, 4=very high

In order to assess regional variations in food supply, the **seasonal availability** of the main locally produced staple foods – ‘**country’ rice and cassava** – is presented by county.

Bomi and **Grand Cape Mount** show a similar pattern: cassava is available through the year at medium to high levels, while country rice, only available in markets during the harvest season from November onwards, is at low levels throughout. The focus groups in Bomi reported that no country rice was available at all from June through October.

Rice reached medium to high levels in **Lofa** and **Gbarpolu** from November to March. Cassava, in contrast, is more available during the lean season, June to October. The lean season starts two months earlier in Gbarpolu compared to Lofa (March/May). Bong and Nimba show a similar pattern with the lean season starting in April and lasting up to September and October.

The supply of country rice in **Montserrado** is highest from February to May, which follows the harvest season with a time lag due the transport from other counties. Cassava follows a very similar pattern, as it is not grown much within the boundaries of Greater Monrovia. Availability corresponds with the dry season, when transport from other counties is easier. It is also an indication that households in Montserrado are more dependent on imported rice.

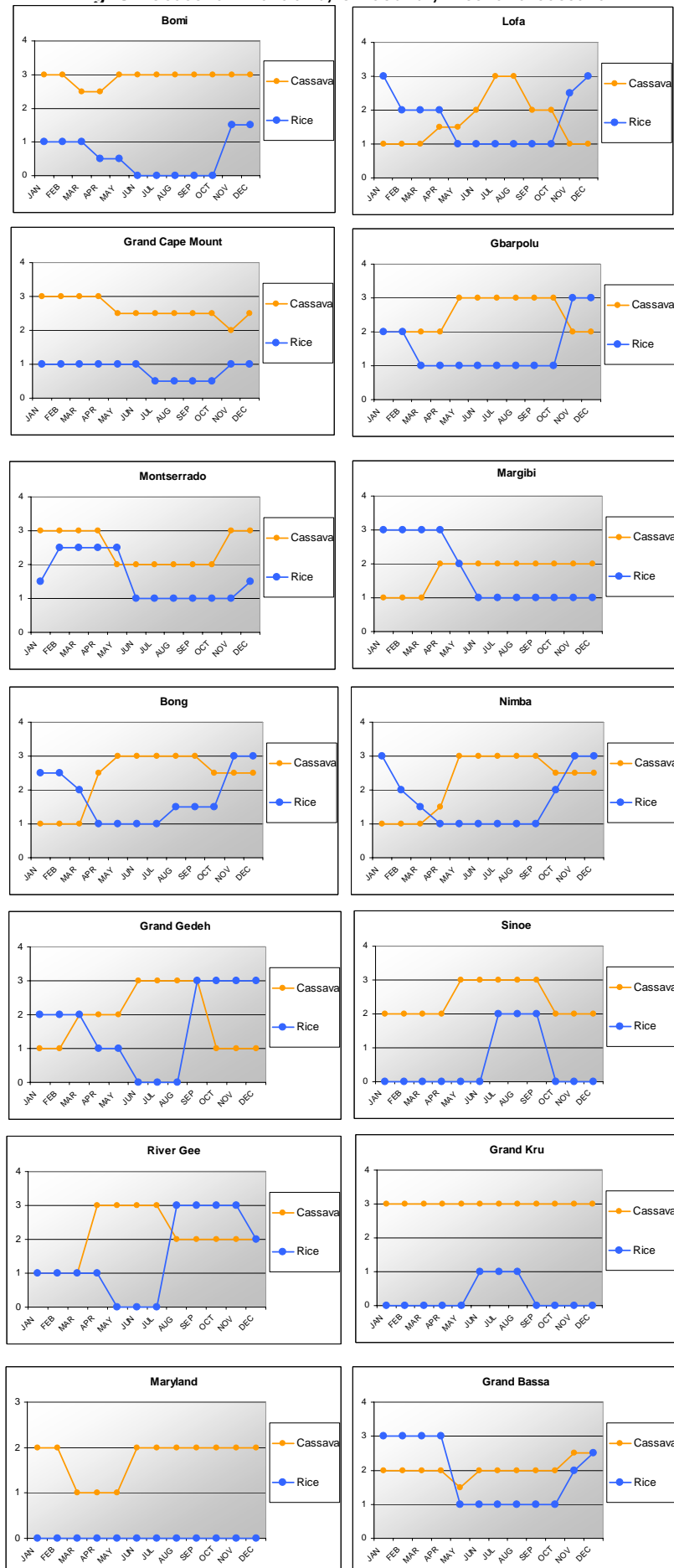
In **Margibi**, country rice is most available from January to May. Here cassava shows the opposite patterns as observed in Lofa and Gbarpolu. **Grand Bassa** shows a similar pattern.

Fig. 8: Seasonal Availability of 'Country Rice' and Cassava

The harvest season in **Grand Gedeh** starts in September, while the lean season is from April to August. The peak for cassava is during the lean season. The pattern is very similar for **River Gee**, where the harvest starts one month earlier.

Cassava dominates in **Sinoe** and **Grand Kru** throughout the year. The lean season for rice lasts from October to June in Sinoe and from September to May in Grand Kru.

Maryland shows a slightly different picture from the rest. The focus group in Pleebo reported that no country rice is available throughout the year. Cassava is available but only at low to medium levels. This indicates that Maryland is highly dependent on rice food imports from Cote d'Ivoire to fulfill the demand for the main staple food.



5.2 Non-food Commodities

The presence of 17 non-food items in the markets visited was assessed, including agricultural inputs, fuel for cooking, medicine and clothing. On average, 12 non-food commodities were found, ranging from only 5 in Sinoe & Grand Kru to all 17 at the Gobachop in Greater Monrovia. The 3 goods that were found in Grand Kru and Sinoe were medicine, and old and used clothing. Additionally, slippers and candles were found in Barclayville (Grand Kru), and charcoal and mobile phone cards in Greenville (Sinoe). Daily markets visited had a slightly higher number of non-food items compared to weekly markets; 13 versus 11.

In terms of **agricultural inputs**, rice seed was found only in three markets in Montserrado, Lofa and Grand Gedeh. Vegetable seeds were found in 16 markets visited, but were not available in the south-eastern Counties. Imported and locally produced tools for agriculture were found in 9 markets (Bong, Grand Bassa, Grand Cape Mount, Lofa, Margibi, Montserrado and Nimba). Locally produced tools were found in Bomi and Grand Gedeh. The availability of fertilizer falls in line with the availability of imported and/or local tools. The exception is Lofa, where no fertilizer was observed.

In terms of **lighting and cooking fuels**, candles were found in all markets except for Greenville (Sinoe). Charcoal was found in most markets but not in Gbarpolu, Grand Kru and River Gee. Quantities were reported to be large in Bomi, Bong, Lofa, Montserrado and Nimba. Kerosene was found in all markets except Grand Kru, Maryland and Sinoe.

Practically all markets offered **clothing** (old and new) and slippers for sale. Only in Sinoe were no plastic slippers found. Other types of shoes (leather or sneakers) were found in 13 markets, but were not present in the south-eastern markets and Gbarpolu.

Prepaid phone cards for cellular phones ("scratch cards") are more and more available in rural centers as the network is expanding. They were found in 15 out of the 21 markets visited.

Overall, the variety of nonfood items correlates with the variety of food commodities found in markets. Generally, counties with more difficult physical access – south-east and Gbarpolu – have much less diversity compared to the other counties. The diversity increases the closer the market is to Monrovia.

5.3 Food Aid Commodities

Among commodities on sale in markets are those that originate as food aid. These are available both at retail and wholesale level – bulgur wheat, split peas, vegetable oil and CSB (corn-soya-blend). Bulgur wheat is sold at L\$5 per tin (approx 1 lb) which is about half the price of country and butter rice. CSB is about L\$15 per tin, while split peas are L\$7.50 per tin.

During the field visits, bulgur wheat was found in 19 out of the 21 markets; the only exceptions were Gbarpolu and River Gee. It was sold by more than 10 sellers per market in Bong, Grand Cape Mount, Lofa, Montserrado and Nimba. Bulgur wheat is not a preferred staple in Liberia and its market is limited to the extremely poor who cannot afford even the cheapest varieties of rice as well as diabetic individuals who need to avoid starchy foods. CSB was found in 14 markets and split peas in 18 markets.

During this review, it was not possible to assess the origin of food aid commodities as most retailers and wholesalers are reluctant to talk about it openly. Generally, it can be stated that there are two possible ways for food aid commodities to reach markets: (1) individual beneficiaries (returning IDPs, refugees from camps inside and outside Liberia, participants of FFW activities) may sell or exchange products for other goods in markets, and (2) food aid commodities meant for school children or the nutritionally vulnerable may be diverted. The first way is generally accepted, while the second is considered to be illegal. A task force has been established by WFP in collaboration with the Ministry of Justice and the Liberia National Police (LNP). Currently, monitoring mechanisms are being further strengthened to control food aid diversions from the entry point into Liberia to the actual food distribution to beneficiaries.

PART VI – CROSS-BORDER TRADE

Liberia shares borders with Guinea, Sierra Leone and Cote D'Ivoire. The ethnic groups residing along these borders are also found in the neighboring countries. Immigration and customs officials recognize the importance of the cross-border trade for their citizens by frequently allowing relatively free movement of people and vehicles to the closest markets. The major immigration points for Koindu in Sierra Leone and Foya in Liberia are located after the international markets in these towns. The major immigration point in Ganta is also on the outskirts of town, after the commercial area.

Liberia's borders are best described as porous. Although there are a number of border crossings, only a few have a functioning customs office. According to GOL revenue reports, the border crossings currently reporting the highest revenue intakes, other than the Freeport and RIA, are two on the Guinean border: Ganta, Nimba County and Yeala, Lofa. Both of these crossings currently provide reasonable road access to Monrovia. The road from Ganta to Monrovia is paved.

As rivers often form the borders for all three countries, the ease of crossing depends upon the season. There are relatively few bridges. During the dry season, the border can be crossed relatively easy at a number of points because the rivers are low. During the rainy season, crossing requires canoes or becomes hazardous.

The magnitude of the trade and commodities traded vary at different border markets. The foreign exchange rate also influences trade at the cross border markets. For instance, when the price of a given commodity is high in terms of foreign exchange, the supply is diverted to the country with the high price. This is particularly true for cash crops such as cocoa, coffee and palm oil. This also affects rice which is the staple food for the three countries. Rice imported in any of the countries easily flows to the country with the highest price. On several occasions the export of imported rice to Guinea has been a major political issue in Liberia. One of the factors in the decision not to provide rice as relief food in Liberia in the mid-1990s was because there was evidence that considerable quantities were being sold in Guinea.

The problems identified by traders with reference to cross-border trade emphasized the arbitrary and/or high customs fees that they had to pay. The other major constraint focused on transportation, including poor road conditions, high fares, and unreliable vehicles. At Bo Waterside, traders complained about the fees charged by the large cart owners to take goods across the bridge. There, commercial vehicles are not allowed to move freely across the bridge, so large carts that are pushed by people are used to move the goods. Those coming from Guinea complained about long delays on the Guinean side.

6.1 Guinea

Guinea appears to be Liberia's largest trading partner. The traders in the informal trade include marketers from Monrovia and citizens of Guinea and its neighbors, especially Mali. There is a fluid population of Guineans residing in Liberia, especially in Monrovia.

Prior to the civil conflict, the trans-shipment of imported goods from the Free Port in Monrovia to Guinea, via Salombah or Ganta was substantial. During the conflict, many of the goods looted in Liberia found their way to Guinea. Currently, several items appear to be less expensive in Guinea, e.g. motorcycles and used cars, and are being imported to Liberia.

Although requiring further study, it appears that the flow of commodities from Guinea is greater than that into Guinea. In particular, several commodities found in almost all markets in Liberia originate in Guinea. These are dried hot peppers, sesame seed, and groundnuts. The dried pepper passes from Ganta (and possibly Yeala) through warehouses in Monrovia at Redlight for retail sale in western Liberia and markets near Monrovia, including Grand Bassa. That sold in south-eastern Liberia passes through Ganta from where it is transported to the south-east. Groundnuts and sesame follow a similar pattern. In several markets, e.g. Foya, Voinjama, and Ganta, dried bony was being sold that originated in Guinea.

Liberia exports palm oil, kola nuts, cocoa and coffee to Guinea. Palm oil production in Guinea is lower than in Liberia, resulting in a higher price for Liberian oil. A major use of that oil is reported to be in soap-making. Cocoa and coffee are currently being sold in Guinea because there are few or no Liberian buyers, particularly in the counties bordering Guinea.

Kola nuts have historically been traded to Guinea and other Sahelian countries, primarily from Nimba. There is also a substantial traffic in dried bush meat.

6.2 Sierra Leone

Bo Waterside in Grand Cape Mount and Foya in Lofa are the two main markets where cross border trade occurs. Prior to the civil conflict, the volumes of commodities traded and number of traders in these markets were quite substantial. Traders from Freetown and Monrovia frequented the Foya market. In January 2007, local authorities reported that the two markets were much smaller in terms of volumes and types of commodities and number of traders.

At Bo Waterside, it was reported that the major commodity (dried and fresh bush meat) which was previously brought in large quantities from Sierra Leone was absent in the market. Small quantities of food commodities from both sides of the border were observed on the market. Women traders from Sierra Leone are reported to come to Liberia, selling Gari or farina and returning with bulgur and other produce.

The Foya market has not yet attained its pre-conflict levels. Vehicles were observed from Sierra Leone and Guinea. People from Sierra Leone mainly brought in fresh fruits and vegetables, while groundnuts, dried hot pepper, and bonny were brought in from Guinea. In return, palm oil, rice, and cocoa were being exported.

It is probable that Vahun District in Lofa is almost entirely dependent upon Sierra Leone for trade. The rehabilitation of the Kolahun - Vahun road will facilitate the reintegration of this district into Liberia.

6.3 Cote d'Ivoire

Trade with Cote d'Ivoire appears to be very important in terms of food security for the south-eastern region. Because of the long distance and the poor condition of the road linking the south-east to Monrovia and the rest of the country, the south-eastern region depends primarily on informal trade with Cote d'Ivoire for their basic needs. The boundary between the two countries is a river. There are bridge crossings to Cote d'Ivoire at Logatuo in Nimba County and Toe Town in Grand Gedeh and a ferry crossing the Cavalla River, near Harper in Maryland County. Otherwise, crossing is by canoe.

In Harper, Maryland County, most of the fresh produce and all of the rice found on the market were brought in from Cote d'Ivoire. While some rice is brought by boat from Monrovia, a significant quantity of the rice consumed in the south-east originates from Cote d'Ivoire. Consequently, the retail price for rice is the highest in the south-east. It appears that rice imported from Cote d'Ivoire is not subject to the Liberian government price regulations for that commodity.

Currently, exports to Cote d'Ivoire appear limited. The trade in dried bush meat has been officially curtailed by Ivorian authorities. Cane juice is a major commodity in parts of the south-east. Its production and importation are officially prohibited in Cote d'Ivoire. It is likely, however, that significant quantities of bush meat and cane juice are smuggled into Cote d'Ivoire.

7.1 International and Regional Shocks/Risks

The biggest risk in Liberia has been political. During the civil conflict, markets did not function normally. Seventeen out of the twenty-one markets surveyed closed during the war and eight did not reopen until 2004.

The current situations in Cote d'Ivoire and Guinea pose a risk to markets in Liberia. Instability or violent conflict in both countries can affect the flow of produce to Monrovia. The south-east is heavily reliant upon goods purchased in Cote d'Ivoire while the northwestern counties obtain produce from Guinea. Political instability in Guinea would probably mean an acute shortage of dried peppers and groundnuts throughout Liberia. The political crisis in Guinea in early 2007 affected the availability and price of dried pepper in Liberia.

In the south-eastern counties bordering Cote d'Ivoire, imported goods, including rice and other food items, come from Cote d'Ivoire. Political instability or conflict in that area would have a significant affect upon the food security of people in that region.

Further, an influx of refugees from Guinea or from Cote d'Ivoire would have a major impact upon food security in the receiving counties, in particular Nimba, Grand Gedeh, Maryland and Lofa.

As Liberia is heavily dependent on food imports, price increases of food commodities could be a major threat to food insecurity in the country. Prices of wheat, rice and maize on the international market have shown an upward trend since 2001, particularly since 2006. Households that do not produce crops – such as urban households or traders - will be particularly vulnerable to price fluctuations on the international market.

7.2 Risks and Coping Strategies of Marketers

During focus group discussions, the risks and constraints of producers, retailers and wholesalers were listed (see annex 4). Participants were also requested to list the activities and methods that they apply to avoid or cope with the risk or constraint. Focus group discussions with retailers took place in all markets visited. No producers were interviewed in Margibi, Maryland, Montserrado and Sinoe as they were either not present or too busy to participate in the discussions. Wholesalers were not found or interviewed in the markets visited in Grand Kru, Maryland, River Gee, Sinoe and Margibi.

7.2.1 Producers

The most frequently cited constraint that producers are facing is the **lack of or bad road network** to reach markets from the production site. Coping strategies applied are to auction the goods in neighboring villages instead of traveling to the market centers, hauling goods on the back and head, contracting casual labourers to carry goods to markets, and sending children to haul goods to markets. This constraint was mentioned in nearly all markets across the country, though no producers were interviewed in Montserrado, Margibi, Maryland and Sinoe.

The second and third most quoted constraints are directly linked to the first one: **high transportation costs**, reported by producers in Grand Cape Mount, Bomi, Gbarpolu and Nimba; and **lack of commercial transport** reported in Bomi, Grand Gedeh, Grand Kru and Lofa. To cope with high transportation costs, producers sometime hire a vehicle as a group to make the transport more cost-efficient. Others increase the price or reduce the quantity of the food commodity in order to recover costs and realize a profit. When no commercial transport is available, producers haul goods to markets and use motorbikes or wheelbarrows to transport their goods. Others responded that they keep the goods on the farm and wait for retailers or wholesalers to pass by to buy the produce.

Also ranked third was the **limited demand** for agricultural produce related to small population size and low purchasing power of local communities. This issue was raised by

producers in Bomi, Gbarpolu, Grand Cape Mount and Grand Kru. Response mechanisms included taking the produce home for own consumption or using preservation techniques such as drying or changing the product into another form (e.g. fresh cassava into gari or fufu).

Finally, related to limited demand, **spoilage of perishable foods** was mentioned as a major constraint by producers in Grand Bassa, Grand Cape Mount and Nimba. Spoilage can take place during storage as well as transport. Responses were to increase the volume of goods for sale to minimize risk and transformation of goods into less perishable forms as mentioned above.

7.2.2 Retailers

The most frequently quoted constraint by retailers is the **high purchase price of goods**. The strategy cited to overcome this was to increase the retail price and/or reduce the quantity to be sold. This constraint was cited by focus groups in all counties except Bong, Grand Cape Mount, Maryland and Sinoe.

Three constraints were mentioned with equal frequency as second rank. Like the producers, retailers find it **difficult to access production sites** due to bad road conditions. Their response is to travel well in advance of market day to the production site, haul goods on the head or pay casual labourers to carry goods to accessible points/areas, limiting the amount that can be marketed. This was mainly mentioned by retailers in Bong, Grand Bassa and Sinoe.

A second constraint is the **competition with producers and wholesalers** in markets. Strategies to overcome this were to decrease the quantity and/or increase the price.

Finally, the **limited supply of commodities** in markets was also ranked second. The main coping strategy is to visit rural villages and towns in search of farm produce. This constraint was mentioned by retailers in Bomi, Bong, Grand Cape Mount, Grand Kru and Lofa.

Ranked third was the **lack of storage facilities** at markets. The retailers' response is to sell produce at low costs or higher quantities to avoid spoilage, sell fresh water fish from nearby rivers rather than (frozen) sea fish, and use preservation techniques to preserve perishable goods for the next day, mainly by drying.

The **need to repair the market shelter was ranked fourth**. Coping strategies included covering goods during rainfall with plastic sheets or tarpaulin and selling goods in front of the house when it is raining instead of going to the market. One group also mentioned the lack of toilet facilities within the market compound.

Five constraints were ranked fifth: **Limited demand** (responses: increase volume or reduce price to minimize loss and spoilage); **spoilage of perishable goods** (responses: preservation of goods, or increase quantity when goods are about to spoil); **high transportation costs** (responses: join up with other retailers to hire vehicle, decrease quantity to recover costs); and competition among retailers (response: visit producers and make arrangements prior to the market days).

Finally, three constraints were ranked sixth: **Theft** (no response); **lack of garbage dump sites** (response: dump garbage at an unauthorized site); and **lack of access to financial capital** (response: negotiate with producers to give goods on credit to trusted buyers).

7.2.3 Wholesalers

The main constraint cited by wholesalers is the **high cost of transportation**. The responses are to increase the wholesale price or to sell the good in smaller units to recover costs and to join with other traders to hire commercial vehicles to reduce costs. Similar to the retailers, the wholesalers also raised the issue of **difficult access to production sites**. To reach these places, they travel several days prior to the market day and contract people to haul goods.

They also complained about **price fluctuations, limited demand** and **spoilage of perishable goods**. In response, some wholesalers add small quantities to motivate buyers. Others store non-perishable goods overnight and sell them at another market on

the following day. For perishable goods, they sell them retail or take them home to turn them into other products such as *fufu* or banana bread.

Other constraints included losing on **money exchange** and **custom duties** when trading products cross-border (response: increase price of commodity or reduce quantity); **no storage facility** (response: preservation techniques, sometimes sell at a loss); **spoilage of commodities during transport** (response: sell at lower price to recover capital); **breakdown of commercial vehicles** (response: change into another vehicles if available and pay again); and finally **competition** among too many wholesalers.

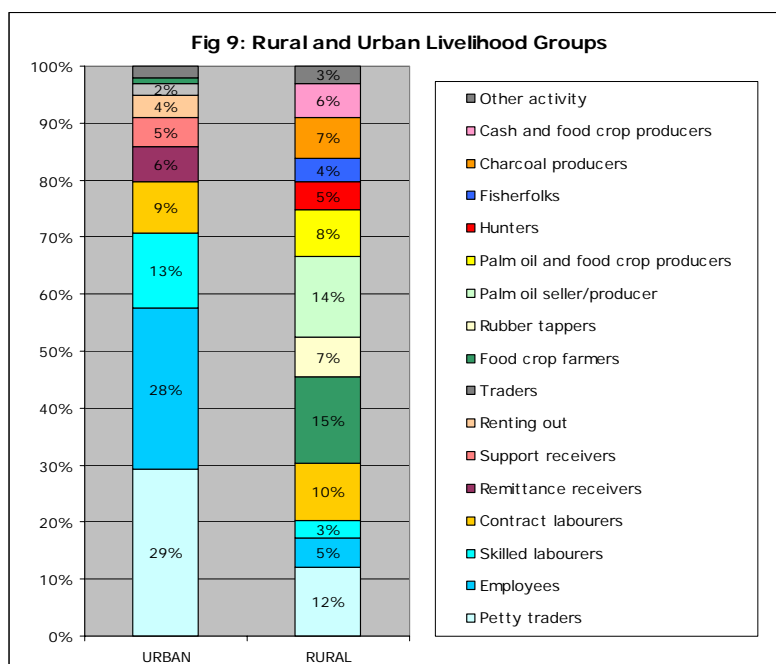
The findings of this section are based on the Comprehensive Food Security and Nutrition Surveys. The countrywide survey was conducted in March/April 2006 and was representative for rural and semi-urban communities. In December 2006, the survey was repeated in Greater Monrovia.

8.1 Rural and Urban Livelihoods

Using principal component (PCA) and cluster analysis, relatively homogeneous livelihood profiles were created based on how much each individual activity contributed to the annual household income.

In the **rural sample**, the following livelihood profiles dominate: food crop producers (15%), palm oil seller/producer (14%), petty traders (12%), contract labourers (10%), rubber tappers (7%), charcoal producers (7%), hunters (5%), employees, fisherfolks (4%), and skilled labourers (3%). 14% rely on a combination of two income sources: palm oil and food crop producers (8%), and cash and food crop producers (6%).

In order to maintain their livelihood sources, petty traders, food crop farmers, palm oil sellers, charcoal producers, cash crops producers, hunters and fisher folk depend heavily on the functioning of markets.



The following livelihood groups depend on a well functioning marketing system in order to purchase the food that they are consuming as they engage in little or no food crop production: petty traders, employees, skilled labourers, contract labourers, palm oil sellers, rubber tappers, charcoal producers, hunters and fisher folks. These groups make up 67% of the rural sample.

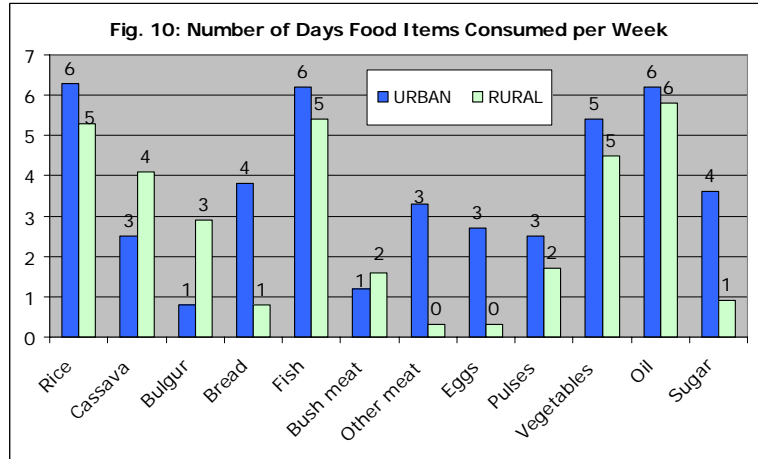
Also, food crop producing households are highly dependent on markets, in order to buy goods that they do not produce and to sustain themselves, especially during the seasonal lean season. They also rely on markets to sell their produce. According to the CFSNS, 10% of the rice produced by food crop farmers in 2005 was sold and about half of the cassava and vegetables harvested were marketed.

The main **urban livelihood profiles** are petty traders (29%), employees (28%), skilled labourers (13%), contract labourers (9%), and remittance receivers (6%). In order to access food, all these groups depend on their cash incomes from formal and informal employment and a well functioning food marketing system based on national production and imports (national food availability).

With reference to the main income activity in the Greater Monrovia survey, the importance of marketing and trade for women is striking. Street vending/petty trading was the main source of income for 38% of the women, followed by 30% who identified themselves as market women. In contrast, only 17% of males indicated that their main source of income was petty trading and 5% identified themselves as market men.

8.2 Household Food Consumption and Sources

Using data on dietary diversity, defined as the number of different foods consumed during the week prior to the survey and the frequency by which these foods are consumed, the food consumption pattern of 5,400 rural/semi-urban households and 1,200 urban households was assessed. Figure 10 illustrates the different consumption patterns between households in Greater Monrovia and the rural/semi-urban sample (CFSNS 2006/07).



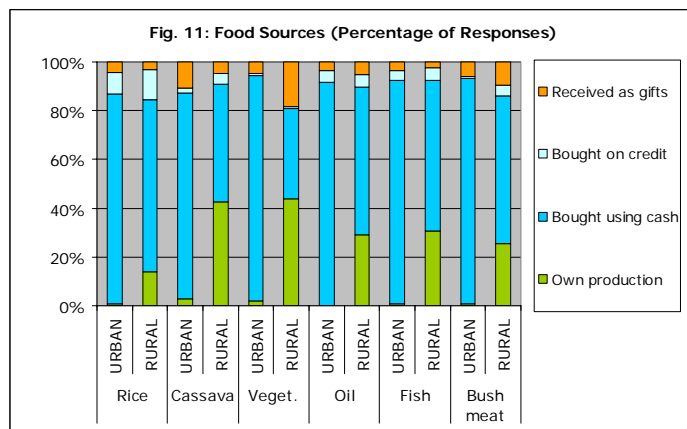
Overall, households in Monrovia show a higher frequency and diversity in their food consumption patterns. In particular, they consume animal protein (eggs, other meat than bush meat), bread and sugar in much higher frequency compared to the rural sample. In the rural population, cassava and bush meat have slightly higher frequencies than the urban sample. For both groups, rice is the major and preferred staple, consumed 5 to 6 days per week.

Using multivariate techniques, households with similar food consumption patterns were clustered and categorized into poor, borderline, fairly and good food consumption groups. The table below shows food consumption levels in the urban sample compared to the rural sample:

Table 7: Food Consumption Levels (CFSNS 2006/07)

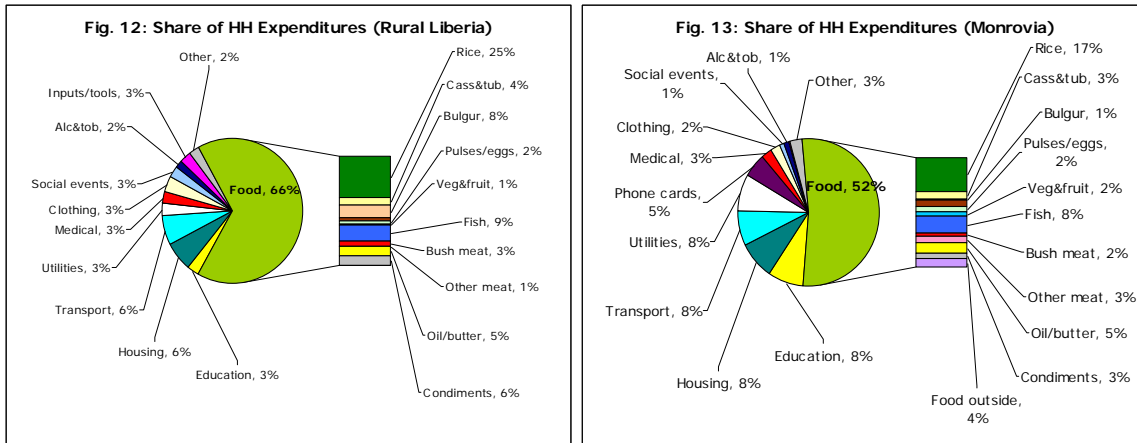
	Food Consumption Group			
	Poor	Borderline	Fairly good	Good
URBAN	3%	10%	20%	66%
RURAL	14%	36%	36%	15%

In March/April 2006, only 17% of rural households reported that all or part of the rice that they consumed came from their own production. 87% had purchased all or some of the rice they consumed. 46% of the households reported that they consumed cassava from their own production, while 52% ate cassava that was purchased from the market. A similar pattern was obtained for vegetables. For urban households, own production is close to zero, and nearly all of the rice, cassava and vegetables consumed were bought from the market. These results indicate that in post-war Liberia, most households, urban and rural, are highly dependent on a functioning market system. The situation may change with time, as rural households restore their livelihoods and rehabilitate their farming systems.



8.3 Share of Household Expenditures on Food

Data on expenditure for food- and non food items, such as education, health, transport etc. are collected to understand how household decision-makers prioritize expenditures, especially when funds are limited. During the CFSNS, respondents were asked to provide estimates for 16 food categories and 14 itemized non-food categories. Estimations were based on a one-month recall for short-term cash and credit expenditures. A 6-month recall period was applied for medium to longer term expenditure.



Rural households have much lower cash expenditures compared to urban households. They spent 66% of their cash expenditure, which is a proxy indicator for income, on food products, mainly on staples: rice (25%), bulgur (9%), fish (9%), condiments including salt and pepper (6%), oil (5%), cassava (4%), and bush meat (4%). The largest non-food expenditures were on transport and housing (both 6%).

Table 8: Per-capita Expenditures by Rural Livelihood Profiles

	Per-capita food expenditure (LD)	Per-capita non-food expenditure (LD)	Per-capita total expenditure (LD)	Share of food expenditure in %
Petty traders	632	344	975	66%
Employees	590	373	962	62%
Contract labourers	547	259	806	68%
Charcoal producers	548	257	805	68%
Fisherfolks	503	289	792	64%
Rubber tappers	512	243	755	69%
Skilled labourers	502	247	749	68%
Hunters	471	250	720	65%
Food crop farmers	428	222	650	66%
Cash & food crop producers	415	232	648	63%
Palm oil seller/producer	418	197	615	69%
Palm oil/food crop producers	378	226	604	62%

Table 8 presents expenditures differentiated by livelihood profile. 'Petty traders' and 'employees' have significantly higher cash expenditures than most other livelihood groups. They have the highest food, non-food and total expenditures. Not surprisingly, all livelihood groups that engage in food crop production

have lower food expenditures. Overall the worst-off group are households that mainly depend on palm oil production – followed by hunting. They have both low food and non-food expenditures, combined with low agricultural production levels. 'Contract labourers', 'charcoal producers', 'rubber tappers' and 'skilled labourers' are, overall, in the medium to higher end, however, they spent nearly 70% of their budget on food. These groups have little or no own production.

Urban households in comparison only spent 52% of their income on food: 17% on rice, 8% on fish, 5% on oil, and 4% on food consumed outside the household (e.g. from 'cook shops', canteens, restaurants, etc.). They spent more on education compared to rural households and utilities – including water, fuel for cooking and generator – (both 8%) compared to rural households. They also spent 5% on phone cards for their mobile phones, an expenditure which was close to zero in the rural sample in early 2006.

In terms of livelihood group, large scale traders, remittance receivers, households renting out and employees have the highest expenditures (see table 9). With the exception of the large-scale traders, they spend proportionally less on food than all other groups. On the other hand, petty traders, casual labourers and food crop producers have the lowest non-food and total expenditures. Households relying on support, petty traders and casual labourers spend the highest share of their income on food.

Table 9: Per-capita Expenditures by Urban Livelihood Profiles

	Per-capita food expenditure (LD)	Per-capita non-food expenditure (LD)	Per-capita total expenditure (LD)	Share of food expenditure in %
Large scale traders	1742	1694	3436	51%
Remittance receivers	1167	1670	2837	41%
Households renting out	994	1709	2704	37%
Employees	1139	1465	2605	44%
Support/gifts	1260	1108	2368	53%
Skilled labourers	1224	1137	2362	52%
Petty traders	1264	970	2234	57%
Casual labourers	1114	783	1899	59%
Food crop producers	630	966	1596	39%

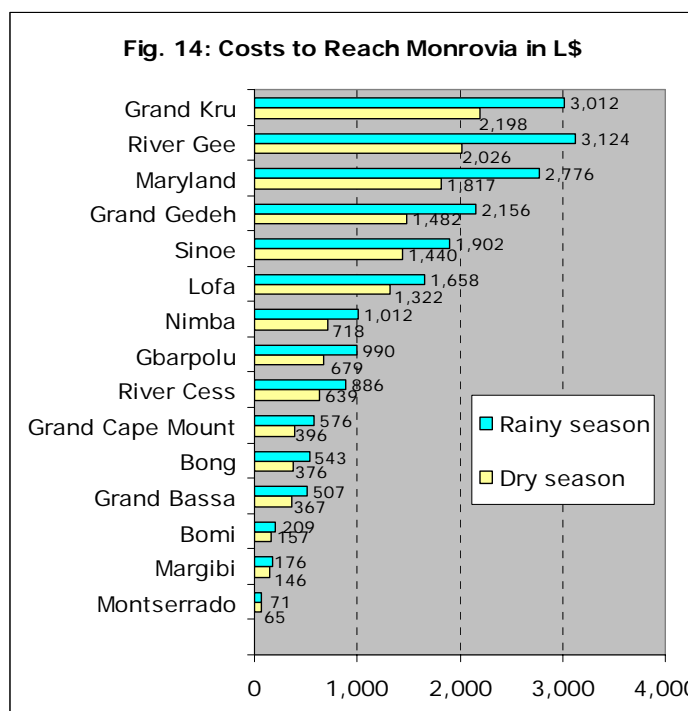
8.4 Physical Access to Markets

Access to markets is crucial for households to purchase food as well as to exchange and sell food products. In the rural survey, 81% of households have access to weekly markets – however in most cases they have to walk long distances to reach them. On average, households in Bong and Montserrado only have to walk for 1½ hours, while households in Gbarpolu have to walk for nearly 6 hours, in Grand Gedeh even up to 9 hours. The average for all households is 2½ hours. 29% of households reported access to daily markets, with a maximum of 54% in Montserrado. Very few or none of the households in Bomi, Grand Bassa, Grand Kru, Lofa and Gbarpolu reported having access to daily markets.

For rural Liberians, purchases of essential items are made either from commercial shops or stores or from the market places. Many rural communities have small shops, usually run by local professionals (teachers or health workers), or Mandingo or Fula traders. These shops sell basic items such as salt, sugar, tomato paste, maggi cubes, onions, etc. If a community doesn't have such a shop, then attending a market is necessary, often a long walk. The itinerant traders in the weekly markets provide these essential items.

Respondents were also asked if they are selling food stuff in Monrovia or in other urban centres in their counties or across the borders. In total, 8% reported selling directly in Monrovia, the majority of them residing in Margibi or Montserrado, where 13% and 22%, respectively, reported to have come to Monrovia during the past 6 months to sell food.

In most other counties, it is only 5% to 8% of households who reported to have done so. Not surprisingly, very few of the households in Lofa, and in the south-eastern counties were able to make it to Monrovia, primarily because of high transportation costs. While households in Margibi, for example, pay less than L\$150 to reach Monrovia (one way), households in Grand Kru pay around L\$2,200 on average during the dry season (see figure 14).



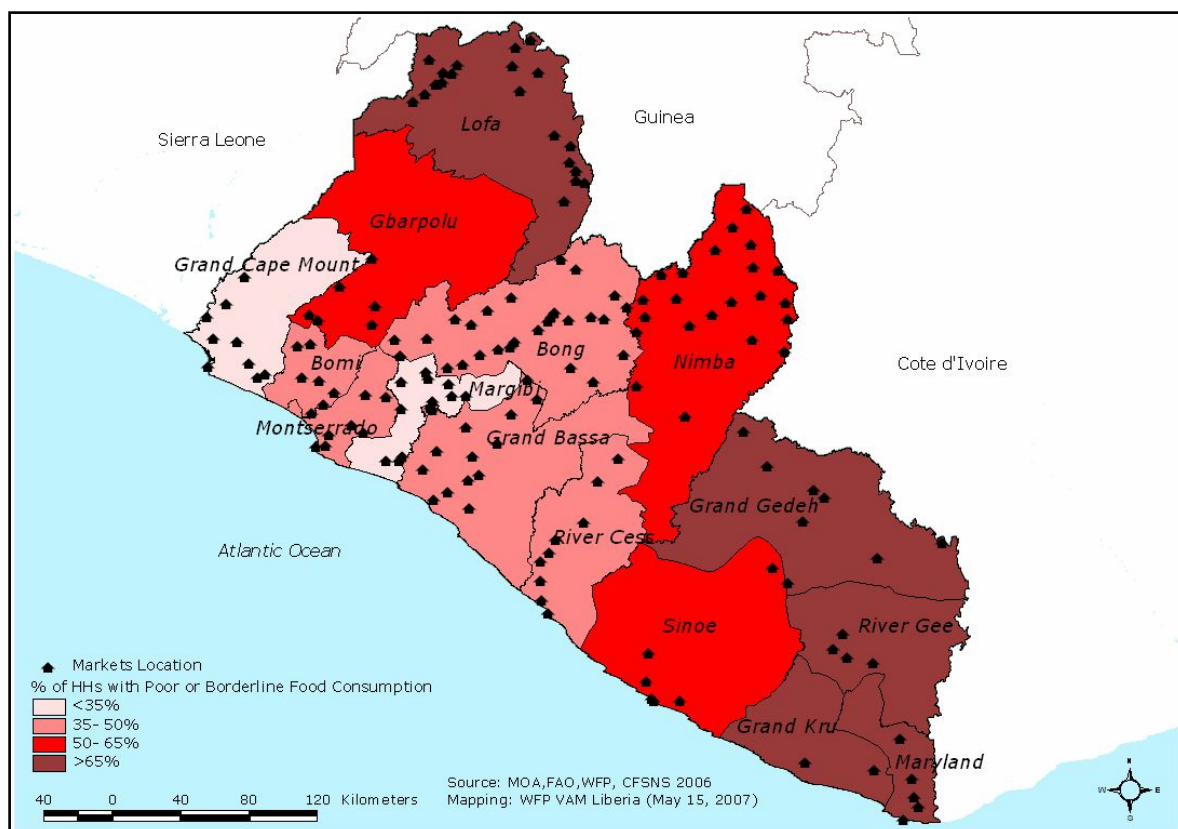
In the surveyed households, 32% reported having sold food stuff in one of the urban centres in their county or across the border. Cross-border trade in both directions was particularly observed in Maryland and Lofa with communities in Côte d'Ivoire and Guinea respectively. In those two counties, more than 75% of households reported to have sold food stuff. High prevalence were also found in Bong, Grand Kru and Sinoe, where households sold food stuffs on the markets in Gbarnga, Barclayville and Greenville.

8.5 Role of Markets for Food Security in Liberia

Access to markets is critical to all Liberian households, urban and rural, in two ways: (1) as a means of livelihoods, and (2) as a source to access food. Any disruption of the marketing system will have a fundamental impact on the food security situation in the country. As the map below shows, there is a certain relationship between household food consumption levels and number of identified markets per county.

Counties that have been characterized as not integrated, in particular Gbarpolu and the south-east, are more likely to be vulnerable to food insecurity. Counties with close connections to Monrovia are less likely to be food insecure. The only exception is Lofa, which was highly food insecure in early 2006 due to high levels of displacement and late return. It has a relatively good market network concentrated along the border with Guinea and Sierra Leone.

Map 3: Household Food Consumption Levels & Number of Markets by County



In analyzing the current state of the Liberian market system, several major factors interact. The depressed state of the economy has forced many Liberians, especially those in urban areas, into the informal marketing sector. Entry into this sector requires little or no education or training and minimal capital. The flexibility of the urban informal sector enables individuals to pursue several activities to maximize income and to pursue what are perceived to be immediate income-earning opportunities. Throughout the years of conflict up to the present, the informal sector has been the foundation of survival for many Liberians. In this economic environment, in which people are in a crowded sector characterized by many sellers of the same basic commodities and low demand, it is unlikely that incomes of most individual marketers will increase. It was not unusual during the field visits to observe urban markets in which the sellers considerably outnumbered the buyers.

Assuming that the Liberian economy will improve and that there will be more and alternative employment opportunities, a number of those currently in the informal sector will opt for other income-earning activities. Marketing is hard work and is not viewed as a prestigious activity by many. As people leave marketing for other activities, there will be fewer sellers of the same commodities. At the same time, as incomes improve and people have more cash to spend, demand will increase. Fewer sellers responding to increased demand should result in improved incomes for these sellers.

Many rural households are selling produce primarily to meet immediate cash needs, relatively few rural households are producing significant amounts for the market. If a rural household is able to meet its basic needs and has available labour to produce a “surplus” to sell, the household is faced with the challenge of getting that produce to market. Provided with a reliable transport network, rural producers are likely to respond to the opportunities for sale.

Based on the analysis, the report concludes by providing recommendations in the following five areas: (1) improved physical access to markets; (2) improved availability of food commodities; (3) enhanced capacity of market institutions; (4) improved marketing infrastructure and services; and finally (5) recommendations are provided to monitor markets and market prices in the context of a food security monitoring system.

9.1 Improved Access to Markets

Producers and traders throughout the country indicated that the major constraint they face is poor access to markets. Increasing access to markets is crucial to improving food security.

At all levels, the rehabilitation and reconditioning of the existing road network, including both the major trunk roads and farm to market roads, must be considered urgent and given the highest priority. The road network needs to be expanded and upgraded. The expansion of the road network should focus particularly on providing better access to currently inaccessible areas, e.g. Grand Kru and Gbarpolu. The construction of the coastal highway linking Buchanan to Harper would facilitate the integration of south-eastern Liberia into the national market system. The expansion and upgrading of farm to market roads throughout the country would provide an incentive to increase production for market sale. While roads constructed and maintained by logging companies will continue to provide access to some areas, in the long-term these roads need to be integrated into the national road network under the management and supervision of the government.

The operation of the Bong Mine – Monrovia railway points out the critical role that railways can play in moving commodities. As the railway from Yekepa (Nimba) to Buchanan is rehabilitated, priority should be given to establishing a regular commercial service along the link. This service would provide easy access to the market for producers in areas of Nimba, Bong, and Grand Bassa who now have poor access. With the rehabilitation of the Buchanan – Monrovia highway, produce transported by rail would find its way to the urban markets of Montserrado and Margibi.

Another problem is the lack of reliable and economic means of transport. Provision of small business loans and training to private investors could encourage engagement in commercial transportation. Additionally, the formation of informal groups and networks comprised of farmers and traders should be encouraged, as they could support each other, for example, by sharing a vehicle for the transportation of goods.

9.2 Improved Availability of Food Commodities

The improvement of food security is contingent on a reliable and adequate supply of commodities on the markets. Among the constraints mentioned by the marketers was the low supply of produce for the markets and high levels of spoilage. Recommendations for improved availability focus upon increased production of commodities and expanded and improved storage and processing of commodities.

For producers, it is critical to increase agricultural productivity through improved technology, expansion of extension services, improved access to agricultural inputs and multiplication centers for improved and high yielding seeds and planting materials. Improving storage techniques and facilities are important in both farming communities and market places.

Improved processing and preservation techniques and facilities would enhance utilization of produce. In particular, the availability of rice mills at close proximity to markets would ease the serious labour constraint in processing locally-grown rice for market sale. Dissemination of technology for processing cassava and plantains and other crops would reduce losses due to spoilage and broaden marketing opportunities. The introduction of appropriate processing techniques would also permit year-round utilization of seasonal produce, e.g. mangoes, citrus fruit, and so on. For those techniques and facilities that require capital investments, small business financing could facilitate their establishment.

9.3 Enhanced Capacity of Market Institutions

The Liberian Marketing Association (LMA) could provide critical services to marketers if properly organized and managed. The Act establishing the LMA should be reviewed and evaluated to determine if legislative revision or repeal of the Act is required. In any case, the leadership of LMA, at both the national and local level, should be democratically elected by the marketers. The operations and functions of LMA need to be decentralized to the district level to empower the local membership and leadership to make decisions regarding the management and development initiatives of their markets. The collection and distribution of market fees should be transparent and the marketers should participate in decisions regarding the allocation of these fees. The role of the national LMA should be limited to coordination and advocacy.

The LMA should assume responsibility for providing basic services, e.g. garbage collection and disposal, cleaning, etc. in the markets. The LMA could also be responsible for the management of warehouses for storage of commodities overnight or weekly. In order to implement the provision of these services, an independent assessment of operating costs of markets should be carried out to determine actual costs and to establish reasonable and fair registration and tickets fees.

Finally, external technical support should be provided to LMA for training in management capacity and skills at both the national and local levels.

Prior to the civil conflict, other institutions played a role in the production and marketing of farm produce, in particular cacao and coffee. Among these were the Liberian Produce Marketing Corporation (LPMC) and the Cooperative Development Agency (CDA). Feasibility studies are required to help identify what roles these institutions could now play, especially in marketing of food produce. LPMC, for example, might participate in the marketing of locally-grown rice, cassava, groundnuts, and palm oil.

Assessments are needed that would identify how farmer cooperatives might contribute to an improved and expanded market system. In particular, consideration should be given to whether cooperatives could organize and manage farm to market transportation.

9.4 Improved Marketing Infrastructure and Services

Prior to 1990, many markets around the country operated from make-shift or inadequate structures. During the civil conflict, many were damaged or destroyed. While some have been repaired and some new market buildings have been constructed, considerable work is still needed to bring market buildings to a standard that provides an environment that is conducive for people to sell and buy.

Urban daily markets often operate in unsanitary, unhealthy, and congested conditions. Weekly markets that are limited to a few hours once a week tend not to have the same magnitude of problems as the daily markets.

The maintenance of market buildings is primarily the responsibility of the sellers, with assistance as needed from appropriate local authorities. As noted above, a properly-governed and managed LMA could be responsible for maintenance. Fees paid by the marketers could provide the necessary funds.

Providing a market building itself is not a sufficient or necessary condition for the development of a market. What creates a market is supply and demand, sellers and buyers. In the absence of these, a market building will not be utilized.

In rehabilitating or constructing market halls, several recommendations are made. First, markets need to be carefully located, i.e. at sites easily accessible to sellers and buyers and where there is sufficient supply and demand. Sites should provide proper drainage, especially during the rainy season, and should have access paths and roads that can be maintained. Sites should be of adequate size to accommodate fluctuations in numbers of sellers and buyers. Finally, market sites can be focal points for the development and provision of other community activities and services, including schools, clinics, and small businesses.

The functions and frequency of the market are major factors in the type of construction required. Weekly markets need structures that provide protection from rain and sun and that can be kept clean. The market also needs to be easily accessible to commercial vehicles. Open-air structures with zinc roofs and concrete floors are sufficient. Adequate drainage is critical, especially during the rainy season. Additional space is needed around the markets to accommodate additional sellers. Some concrete tables that can be easily scrubbed may be appropriate for fresh meat, poultry and fish.

For markets that are predominately wholesale, access, space, and flexibility are the major concerns. Access is needed both for vehicles and for those walking. Flexible space is needed for the varying quantities and types of containers, e.g. bags, bunches, tins and so on. Space also needs to be flexible to accommodate different produce. For these markets, roofed, concrete floored structures are appropriate. During the dry season, the marketers may prefer to work in open space. Adequate drainage and provision for waste disposal are essential.

Daily markets that are primarily retail have different requirements. These markets should also have roofs and concrete floors. Good ventilation and interior lighting of any structure is important so walls should be constructed to meet these requirements. As the sellers in these markets are usually full-time, the market building should provide an appropriate working environment, e.g. space for marketers to sit, eat, and so on. Permanent tables are appropriate but probably should be designed to accommodate different commodities, e.g. rice, greens, fish, oil, and so on.

All markets should have water for drinking and cleaning and toilet facilities. Daily markets, in particular, should have warehousing or storage facilities, including cold storage. The LMA could provide the management for these facilities.

Marketers tend to believe that access to credit would permit them to improve their businesses and their incomes. To determine whether this conception is accurate, however, requires more careful analysis of their situation. In the absence of improved supply and demand, provision of credit will have little impact. In many cases, what may be more important is training in business management and accounting.

One of the constraints facing marketers is the banking system in Liberia. Generally, marketers perceive banks as not being “user-friendly” to them. The reactivation and expansion of banks to rural Liberia, including the Agricultural and Cooperative Development Bank, are essential to the economic revitalization and development of the rural economy. Banks can be encouraged to structure their services for marketers functioning with small amounts of money and collateral.

9.5 Monitoring of Markets and Prices within the Context of a Food Security Monitoring System

One of the objectives of the market review is to provide guidelines on the establishment of a monitoring system for markets and prices within the framework of the food security monitoring system.

In order to capture seasonality and other variations, it is recommended that key indicators are monitored on a monthly basis, including:

- Availability of staple food commodities
- Availability of seeds - particularly rice - and tools
- Commodities traded cross border
- Wholesale and retail prices of key food commodities
- Availability and cost of transportation
- Market attendance (both buyers and sellers)

In terms of coverage, one daily and one weekly market should be visited in each county per data collection round. Visits should take place on the market day. If countrywide coverage is not feasible, the following criteria should be used to select the sites: the following factors should be considered when identifying the sites: (1) areas with high population density/high urbanization, (2) areas that are geographically isolated, (3) counties with active cross-border trade with neighboring countries, (4) high agricultural production areas, (5) centrality to the capital Monrovia, and (6) market frequency (daily/weekly).

In order for the system to be sustainable, the monitoring should be integrated into the national statistical infrastructure, e.g. LISGIS and MOA. It should be integrated into the National Food Security and Nutrition Monitoring System that is currently being established. External support should focus on capacity-building of these national statistical institutions.

It should be considered to expand the current LISGIS system, which is currently covering 5 counties (Montserrado, Grand Bassa, Margibi, Bong, and Bomi) in terms of geographical coverage and reporting frequency as it could serve as a viable national price monitoring system. The price data collection format under this initiative is highly desirable as a monitoring system given its comprehensiveness. The outputs would also meet the high demand from many humanitarian and development agencies that are currently forced to collect similar information through their own resources.

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ANNEXES

Annex 1: Key Informant Interviews

Institution	Location	Key Informant (s)
Ministry of Agriculture	Monrovia	Deputy Minister for Planning
LISGIS	Monrovia	Director General
Sinkor Trading Corp.	Monrovia	Operations Manager
Ministry of Commerce	Monrovia	Deputy Minister For Planning
Ministry of Labor	Monrovia	Deputy Minister for Planning
LMA	Monrovia	Interim Secretary General and Mkt. Superintendents
NPA	Monrovia	One Senior Technician
LPMC	Monrovia	Two senior Technicians
Local Authorities	Buchanan	Development Sup. and County Agric. Coordinator
LMA	Buchanan	LMA County Superintendent and staff
Local Authorities	Gbarnga	Admin. Assistant to Sup., Agric. Coord. & Project Planner
LMA	Gbarnga	LMA County Superintendent and staff
Local Authorities	Sanniquellie	County Superintendent
LMA	Sanniquellie	LMA County Superintendent and staff
Local Authorities	Saclepea	County Agric. Coordinator
LMA	Saclepea	Saclepea LMA Market Superintendent
LMA	Ganta	Chairman Ganta Marketing Association and staff
Local Authorities	Voinjama	Admin. Assistant to Superintendent and Agric. Coordinator
LMA	Voinjama	LMA County Superintendent and staff
Local Authorities	Foya	Foya District Commissioner
LMA	Foya	Foya Market LMA Superintendent and staff
LMA	Tubmanburg	LMA County Superintendent and staff
LMA	Sass Town	Sass Town Market LMA Superintendent and Staff
Local Authorities	Sinje	Garwula District Commissioner
Local Authorities	Zwedru	Acting County Sup. and County Agric. Coordinator
LMA	Zwedru	LMA County Superintendent and staff
Local Authorities	Harper	County project Coordinator
Local Authorities	Barclayville	County Superintendent
Local Authorities	Fish Town	Development Sup., Farm Inspector and Project Planner
LMA	Kakata	LMA County Superintendent and staff
Local Authorities	Greenville	Development Superintendent
LMA	Greenville	LMA County Superintendent and staff
Local Authorities	Bolowea	LMA Superintendent and Chief of Bolowea Town,

Annex 2: Surveyed Markets

No.	Selected Market	Close to Border		Frequency		
		NO	Yes	Daily	Weekly	Both
1	Gobachop	X		X		
2	Clara Town	X		X		
3	Harbel	X		X		
4	Buchanan	X		X		
5	Compound #3	X				X
6	Bo Waterside		X		X	
7	Gbarnga	X		X		
8	Saclepea		X			X
9	Ganta		X	X		
10	Voinjama		X			X
11	Foya		X			X
12	Jenepleta	X			X	
13	Sass Town	X			X	
14	Daniel Town	X			X	
15	Tubmanburg	X		X		
16	Bopolu	X			X	
17	Zwedru	X		X		
18	Greenville	X		X		
19	Fish Town	X			X	
20	Barclayville	X			X	
21	Pleebo		X	X		

Annex 3: Trade Statistics

Merchandise Trade: Imports and Exports (2000-2005)

	2000	2001	2002	2003	2004	2005
	US\$ Million					
Total exports	120.3	127.9	166.5	108.9	103.8	112.2
Rubber	57.1	54	59.2	43.9	93.4	98.7
Timber	61	69.2	100.4	54.6	0	0
Cocoa	0.6	0.5	0.4	0.9	3.5	5.7
Coffee	0.5	0	0.2	0.1	0	0
Other	1.1	4.3	6.3	9.5	7	7.8
	Percentage Shares					
Total exports	100	100	100	100	100	100
Rubber	47.4	42.2	35.5	40.3	89.9	87.9
Timber	50.7	54.1	60.3	50.1	0	0
Cocoa	0.5	0.4	0.2	0.8	3.3	5.1
Coffee	0.4	0	0.1	0	0	0
Other	0.9	3.4	3.8	8.7	6.7	7
	US\$ Million					
Total Imports	145.8	155	145.3	140	268.1	273.6
Food and live animals	43.1	49	40.9	40.6	61.9	51.2
Of which rice	22	22	30.5	39.2	27.5	24.5
Beverages and tobacco	5	4.9	4.5	4.4	9.2	6.8
Crude materials inedible excluding fuel	5.2	3.1	1.6	2.9	2.3	6.5
Mineral fuels lubricants	30.2	31.9	49.7	30.7	70.6	92.2
Of which petroleum	28.6	30.1	48.4	29.7	66.2	90.8
Animal, vegetable oil	2.7	2	2.3	2	2.7	2
Chemicals and related products	11.5	7	6	5.5	7.1	7.3
Manufactured goods	16.6	14.7	9.7	11.9	25.4	21.8
Machinery and transport equipment	24	28.3	11.5	11.9	50.6	44.9
Miscellaneous manufactured	7.5	14.1	19.2	30.3	38.3	40.9
	Percentage Shares					
Total	100	100	100	100	100	100
Food and live animals	29.6	31.6	28.2	29	23.1	18.7
Of which rice	15.1	14.2	21	28	10.3	9
Beverages and tobacco	3.4	3.2	3.1	3.1	3.4	2.5
Crude materials inedible excluding fuel	3.6	2	1.1	2.1	0.9	2.4
Mineral fuels lubricants	20.7	20.5	34.2	21.9	26.3	33.7
Of which petroleum	19.6	19.4	33.3	21.2	24.7	33.2
Animal, vegetable oil	1.8	1.3	1.6	1.4	1	0.7
Chemicals and related products	7.9	4.5	4.2	3.9	2.7	2.7
Manufactured goods	11.4	9.5	6.6	8.5	9.5	8
Machinery and transport equipment	16.4	18.3	7.9	8.5	18.9	16.4
Miscellaneous manufactured	5.1	9.1	13.2	21.6	14.3	15
Trade Balance (US\$ Million)	-26	-27	21	-31	-164	-161

Source: Liberia Statistical Index IMF 2006

Annex 4: Summary of Constraints by County

		Producers	Retailer	Wholesalers
Bomi	1	High transportation costs	High purchase price of commodities	Competition with other traders
	2	Lack of commercial transport	Competition with other traders	Limited demand
	3	Limited demand	Limited supply of goods on markets	High transportation costs
Bong	1	Difficult access from production site to market	Competition with other traders	High transportation costs &
	2		Limited supply of commodities on market	Price fluctuations
	3		Difficult access to production site	Difficult access to production site
Gbarpolu	1	Difficult access to production site	Competition with other traders	Difficult access to production site
	2	Limited demand	High purchase price of commodities	High transportation costs
	3	High transportation costs		
Grand Bassa	1	Difficult access from production site to market	Difficult access to production site	Price fluctuations
	2	Spoilage of perishable goods	Competition with other traders & spoilage of goods	Lack of commercial transport
	3	Hauling of goods on head	High purchase price of commodities	
Grand Cape Mount	1	High transportation costs & difficult access to production site	High transportation costs and & competition with other traders	High transportation costs & loosing out on exchange rate
	2	Limited demand	Limited supply of commodities & no storage facilities	Limited demand and high custom fees
	3	Spoilage of perishable goods	Lack of commercial transport	Spoilage of perishable goods
Grand Gedeh	1	Difficult access from production site to market	Market shelter needs repair	High purchase price of commodities
	2	Lack of commercial transport	Theft	Difficult access to production site
	3		High purchase price of commodities	Lack of commercial transport
Grand Kru	1	Difficult access from production site to market	High purchase price of commodities	
	2	Limited demand	Limited supply of goods on markets	
	3	Lack of commercial transport		
Lofa	1	Lack of commercial transport	High purchase price of commodities & loosing out on money exchange	High transportation costs
	2		Competition and no storage facilities	Difficult access to production site
	3		Limited supply of goods on markets	
Margibi	1		Spoilage of perishable goods	
	2		High purchase price of commodities	
	3		Lack of access to financial capital	
Maryland	1		Competition among traders	
	2			
	3			
Montserrat	1		Limited demand	High transportation costs
	2		Market shelter needs repair & no storage facility	Spoilage of commodities during transport
	3		Lack of garbage dump	No storage facility
Nimba	1	Difficult access from production site to market	High purchase prices	High transportation costs
	2	High transportation costs	Loosing out on money exchange	High purchase price of commodities
	3	Spoilage of perishable goods	Spoilage of perishable goods	Spoilage of perishable goods
River Gee	1		No storage facility	
	2		High purchase prices	
	3			
Sinoe	1		Difficult access to production site	
	2		High transportation costs	
	3			

Annex 5: Availability of Commodities

Commodity available	Bomi	Bong	Gbarpolu	Grand Bassa	Grand Cape Mount	Grand Gedeh	Grand Kru	Lofa	Margibi	Maryland	Montserrado	Nimba	River Gee	Sinoe
Butter rice	X	X	X	X	X	X		X	X	X	X	X	X	X
Parboiled rice		X		X		X		X	X		X	X		
Sondon rice	X	X		X	X	X	X	X	X	X	X	X	X	X
Other imported rice		X		X	X	X		X	X	X	X	X		
Country rice	X	X	X	X	X	X		X	X		X	X	X	
Bulgur wheat	X	X		X	X	X	X	X	X	X	X	X		X
CSB/Cornmeal		X		X	X	X		X	X	X	X	X		
Fresh cassava	X	X	X	X	X		X	X	X	X	X	X		
Farina	X	X	X	X	X	X	X	X	X	X	X	X		
Fufu	X	X	X	X	X	X			X	X	X	X		X
Plantain	X	X	X	X	X	X		X	X	X	X	X	X	X
Eddoes	X	X	X	X	X	X		X	X	X	X	X		
S/Potatoes	X	X	X	X	X	X		X	X		X	X		
Yam		X	X	X	X	X					X	X		
Bread	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Cowpeas	X	X		X	X	X		X	X	X	X	X		X
Split peas	X	X	X	X	X	X		X	X	X	X	X		
Peanuts	X	X	X	X	X	X		X	X	X	X	X	X	X
Sesame	X	X	X	X	X	X		X	X	X	X	X		X
Eggs		X		X	X	X		X	X		X	X		
Dried fish	X	X	X	X	X	X	X	X	X	X	X	X	X	X
fresh fish	X	X	X	X	X	X		X	X	X	X	X		X
Chicken meat	X	X		X	X			X	X		X	X		
Cow meat						X		X	X		X			
Bush meat		X	X	X	X	X		X	X		X	X	X	
Livestock	X		X	X	X	X		X			X	X		
Wildlife		X	X	X	X	X		X				X		
Nido		X		X		X			X		X			
Evaporated milk	X	X	X	X	X	X		X	X	X	X	X		
Fruits	X	X		X	X		X	X	X	X	X	X	X	X
Fresh vegetables	X	X	X	X	X	X	X	X	X	X	X	X		X
fresh pepper	X	X	X	X	X	X	X	X	X	X	X	X	X	
Dried pepper	X	X	X	X	X	X	X	X	X	X	X	X	X	X
onions	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Greens	X	X	X	X	X	X		X	X	X	X	X		X
Palm oil	X	X	X	X	X	X		X	X	X	X	X		X
Palm nuts	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Vegetable oil	X	X	X	X	X	X		X	X	X	X	X	X	X
Salt	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Sugar	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Chicken soup	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Agri. tools - imported		X		X	X			X	X		X	X		
Agri. tools - local	X	X		X	X	X		X	X		X	X		
Rice seeds						X		X			X			
Vegetable seeds	X	X	X	X	X	X		X	X		X	X		
Fertilizer	X	X		X	X	X			X		X	X		
Charcoal	X	X		X	X	X		X	X	X	X	X		X
Fire wood	X	X			X	X		X			X		X	
Candles	X	X	X	X	X	X	X	X	X	X	X	X	X	
Kerosene	X	X	X	X	X	X		X	X		X	X	X	
Western medicines	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Traditional medicines	X	X		X	X	X		X	X		X	X		
New clothing	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Used/old clothing	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Cloth	X	X	X	X	X	X		X	X	X	X	X	X	
Slippers	X	X	X	X	X	X	X	X	X	X	X	X	X	
Shoes	X	X		X	X			X	X		X	X		
Scratch cards	X			X	X	X		X	X	X	X	X		X

Commodity available in large quantity	Bomi	Bong	Gbarpolu	Grand Bassa	Grand Cape Mount	Grand Gedeh	Grand Kru	Lofa	Margibi	Maryland	Montserrado	Nimba	River Gee	Sinoe
Butter rice		X		X	X						X	X		
Parboiled rice											X			
Sondone rice		X		X							X	X		
Other imported rice											X			
Country rice				X				X			X			
Bulgur wheat				X	X						X	X		
CSB/Cornmeal											X			
Fresh cassava		X		X	X						X			
Farina	X				X						X			
Fufu	X	X		X	X						X			
Plantain				X							X	X		
Eddoes				X							X	X		
Sweet potatoes											X	X		
Yam														
Bread											X			
Cowpeas								X			X	X		
Split peas											X			
Peanuts											X	X		
Sesame								X			X	X		
Eggs														
Dried fish				X	X				X		X	X		X
Fresh fish											X			
Chicken meat											X			
Cow meat														
Bush meat		X		X		X					X	X		
Livestock														
Wildlife														
Nido Milk									X					
Evaporated milk									X					
Fruits				X				X			X			
Fresh vegetables											X			
Fresh pepper				X						X	X		X	
Dried pepper		X									X			
Onions					X						X			
Greens	X	X			X						X			
Palm oil	X			X	X			X			X	X		
Palm nuts				X	X						X		X	
Vegetable oil											X			
Salt								X	X		X	X		
Sugar											X			
Chicken soup									X		X			
Agri. tools - imported		X												
Agri. tools - local														
Rice seeds														
Vegetable seeds											X			
Fertilizer														
Charcoal	X	X							X		X	X		
Firewood														
Candles				X							X			
Kerosene														
Western medicines				X	X									
Traditional medicines											X			
New clothing	X	X							X			X	X	
Used clothing	X	X		X	X				X		X	X		
Cloth				X	X				X		X	X		
Slippers		X							X		X	X		
Shoes									X			X		
Scratch cards								X						

Annex 6: Case Study – The Bong Mines to Monrovia Marketing Chain

Bong Mines, located in Fumah District, Bong County, was an iron ore concession operated from the 1960s by the Bong Mining Company, a joint venture of the Liberian government and a German company. By the late 1980s, the ore reserves that could be profitably mined had been depleted and plans were in place to close the mining operation. In addition to the mining complex itself, several satellite communities developed adjacent to the mine. The ore was transported to the “Bong Mine Pier” in Monrovia for export via a 77 kilometer-long railroad constructed and maintained by the mining company. Bong Mines was linked to Kakata by a motor road that is unpaved.

In 1990, the advance of the civil conflict brought mining activities and the export of ore to a halt. The German management team departed, leaving the concession in Liberian hands. Subsequently, the German company informed the Liberian government that it did not intend to return to the concession. In the late 1990s, a Liberian firm, Geoservices, signed a contract for the management of the concession and its remaining assets. Geoservices continues to export scrap metal and to produce crushed rock. The railroad has been rehabilitated for the transport of these materials to Monrovia.

Geoservices has added a commercial train, running four times weekly (Monday, Tuesday, Wednesday, and Friday) between Bong Mine and the Bong Mine Pier in Monrovia. The train makes 11 stops along the way, picking up produce and passengers. This service has opened a marketing outlet for people around the Bong Mine area and the areas along the track. In addition to the commodities transported from Bong Mine, the train carries commodities from Monrovia, e.g. rice, frozen fish and chicken parts and other dry goods.

The Marketing Chain: In the catchment area of Bong Mines, there are six weekly markets, including Bopota, Handii, Gbemu, Jawaje, Yarkpa Town, and Compound. Like other weekly markets in Liberia, farmers bring their produce for sale and buy dry goods from itinerant traders, many of whom live in Bong Mine Town. Wholesalers frequent the markets, buying produce for sale in Monrovia. They contract with local vehicles to transport them between the weekly markets and Bong Mines.

Before the introduction of the train services, the wholesalers transported their produce by an often impassable road through Kakata. Although this route is still being used, marketers are taking advantage of the train because it is cheaper, reliable, and safer. Most important, the carrying capacity for commodities and passengers of the train is significantly larger than that provided by road vehicles.

The Handii Market: The weekly (Tuesday) market in Handii, located about nine kilometers northwest of Bong Mines on the St. Paul River, was visited by the research team. On the day of the visit, dominant food commodities found on the market were palm oil, pineapples, plantains, and fresh water fish (dried and fresh). Other commodities such as rice, bitter balls, hot pepper, cassava, eddoes, fresh water crayfish, bush meat, etc were also found in the market but not in large quantities. Two dead monkeys were hanging from vehicles. One dead “raccoon,” a live pangolin, an infant chicken hawk, and several infant crocodiles were for sale. One trader was observed with shotgun shells. There were approximately a half dozen commercial vehicles, mostly from Bong Mine, at the market at the time of the visit.

Most of the farm produce, particularly palm oil, appeared to have originated from the north bank of St. Paul from as far as Gbarpolu County. The produce is head loaded to the river bank and transported across the river by canoes at L\$5 per crossing. The wholesalers, who may have contracted for the produce in advance, conclude their purchases at the river bank. Some of the wholesalers, especially those dealing in palm oil, cross the river themselves and spend several days in the bush buying palm oil from producers.

In Handii, the team met a group of twenty-five young men and women who identified themselves as the Handii Youth United Club, organized like a “susu” to support its members in marketing. Each week, every member contributes a five gallon container of palm oil and L\$100. The twenty-five containers of palm oil and L\$2,500 to cover transport costs are given to one of the members to market.

The members of the club reported that they, the youth of the Handii area, are the major suppliers of palm oil to the wholesalers. Realizing that the sale of palm oil is profitable, they decided to organize the “palm oil susu” in order to bypass the wholesalers, enabling

them to earn more from the sale of their palm oil. The L\$2,500 collected is intended to finance the transportation cost to Monrovia or any urban market to which the recipient intends taking his/her oil for sale.

When asked “how they got the idea to form the club,” they answered that it was their own idea. It seems likely that at least some of the members were former combatants. When asked what would happen if a member didn’t meet the weekly obligation, they replied that they would “counsel” that person. In addition to the one container that was contributed to the club, the members had more oil that they marketed using established networks. While the long-term viability of the club will not be evident until several cycles have been completed, the enthusiasm and commitment of the members makes the group a likely candidate for support as a small-business.

The Train Trip: The train originates at the Bong Mine station. Commodities are loaded onto flatbeds, while passengers board several cars. Some members of the research team joined the train on its trip to Monrovia. Passengers pay fares that range from L\$135 (Bong Mine to Monrovia) to L\$35 (Crozierville to Monrovia). There is a single fee for transporting a commodity. The fees for commodities are listed below.

As the train traveled from Bong Mine toward Monrovia, more passengers boarded, and produce, especially charcoal, was loaded. The crew on the train was responsible for filling out the tickets for the traders which identified the “load” of traders by number and listed the quantities being transported. As the train approached the outskirts of Monrovia, the passengers began to disembark. Those disembarking at Crozierville are reported to live in the Redlight area and travel to the Bong Mine Pier the following morning to collect their produce.

TRAIN FARES PER COMMODITY			
No	Commodity	Unit	Fare/Unit (L\$)
1	Charcoal	Bag	20
2	Cassava	Bag	40
3	Palm oil	Jerry can	40
4	Oranges	Bag	40
5	Rice	Bag	40
6	Plantain	Bunch	10
7	Palm nuts	Bag	40
8	Vegetables	Bag	40
11	Planks, round pole	Piece	NA
13	Frozen fish/meat	Carton	20 -40
14	Soft drinks	Crate	20

Off loading and Marketing at Bong Mine Pier: When the train arrives at the Bong Mine Pier, the cargoes/commodities are not offloaded until the following morning. The ticket number of each passenger is written on his/her cargos. The tickets are presented to the train crew who match numbers with those on the commodities. Each consignee is required to pay “ground fees,” e.g. L\$2 per bag of charcoal, to the management of Geo-Services and taxes to FDA for certain categories of forest products, e.g. L\$3 per bag of charcoal. The ground fees are intended to maintain the offloading market area, while the taxes paid to FDA are being deposited into Government revenue.

According to the records of Geoservices, the total commodities brought to the Bong Mine Pier from January 2005 to March 2006 are quoted in the chart below.

COMMODITIES TRANSPORTED ON GEOSERVICES TRAIN FROM BONG MINES TO MONROVIA					
	Palm Oil	Palm Nuts	Cassava	Plantain/ Bananas	Charcoal
UNIT	Jerry cans	Bags	Bags	Bunches	Bags
Jan-Mar 05	8,395	1,566	571	5,988	71,835
Apr-Jun 05	7,619	1,299	1,584	3,478	65,422
Jul-Sept 05	2,777	2,084	1,783	2,804	85,405
Oct-Dec 05	3,172	2,036	442	4,400	60,843
Jan-Mar 06	20,194	8,559	913	20,321	202,117
TOTAL	42,157	15,544	5,293	36,991	485,622

As the offloading starts, a large number of marketers from different parts of Monrovia come to buy commodities at wholesale, e.g. charcoal, palm oil, and palm nuts. Commodities such as fruits and vegetables are sold retail at prices lower than the central or neighborhood markets but at prices double or triple that paid in the Handii market.

There are no standard prices of commodities offloaded from the train. They are based on negotiations between the sellers and buyers. One charcoal producer/seller indicated that the price of charcoal per bag ranges from L\$120 – 135. She reported that she buys the

sticks/wood, pays a power saw operator to cut, and casual laborers to assist in the burning process. At the present time, it appears that most of the charcoal being marketed is produced from old rubber trees, plentiful in the area along the train track. Indeed, the route could be described as the “charcoal belt” of Liberia.

Conclusions: The regular train service from Bong Mines to Monrovia provides an alternative means of transport that is reliable, cost-effective, and secure for producers and sellers. The train which provides access to production areas in Bong and Montserrado Counties that are otherwise relatively inaccessible has probably been an incentive to agricultural production. The success of the Geoservices train suggests that a feasibility study should be conducted regarding the utilization of the train route from Yekepa to Buchanan. This route would open up significant areas of Nimba, Bong, and Grand Bassa Counties that are currently relatively inaccessible for export of agricultural produce.

Annex 7: Case Study – Marketing Frozen Fish

In the 1970s and 80s, the Mesurado Fishing Company, part of the Mesurado Group of Companies, supplied frozen fish throughout Liberia. The company operated a deep-sea fishing fleet of its own. Cold-storage depots, some relying on generators, were installed throughout the country. Refrigerator trucks transported the frozen fish from the central depot in Monrovia to depots in all counties except Maryland, Sinoe, and Grand Cape Mount where there was a sufficient supply of fresh fish from the local artisanal fishing communities.

Mesurado’s distribution system was a two-level system. Mesurado Fish Company managed the system from deep-sea fishing to the depot outlets, including inland transport and depot management. The depots were the transfer points from the centrally managed wholesale level to the decentralized retailing level. Sales operations were supervised by a sale agent who in turn contracted for a limited number of retailers. The agents bought fish for their own retail business and for sale to a number of market women. Fish not sold during the day was preserved by smoking/drying. The distribution scheme combines the economies of scale for the centralized operation of a fragile transport and storage system with the economies of proximity for a decentralized small-scale retail layer (PDA 44).

Location	Supply 1 = Highest 2 = High 3 = Medium
Monrovia: Logan Town (Head Office)	1
Paynesville Red Light (2 depots)	1
Bushrod Island: Duala	3
Monrovia: Watersdie/West Point	3
Margibi: Cotton Tree	3
Margibi: Kakata	1
Grand Cape Mount: Bo Waterside	3
Bomi: Tubmanburg	3
Grand Bassa: Buchanan	2
Bong: Bong Mines	3
Bong: Totota	2
Bong: Gbarnga	2
Nimba: Ganta	2
Lofa: Zorzor	3

In 2007, Mesurado’s function has been assumed by the West Africa Enterprises, Inc. located in Logan Town, Monrovia. (Interview, Operations Manager, Feb. 2007). In February 2007, the firm had fifteen depots in Greater Monrovia and seven counties.

With the exception of Buchanan, which is privately owned, the depots are jointly owned by the agency and its field agents. The agents are responsible for purchasing or leasing land, providing the structure, and depositing US\$10,000, while the agency is responsible for providing the cold storage unit, a generator, and supplying the agents with commodities.

Commodities including fish, pig products, cow meat, poultry products, and sausages are supplied to the depot. The agents pay the agency the value of the goods, keeping the balance as profit. Commodities are priced according to their value and weight. Highest sales are recorded in July, August, and December.

The major constraint faced by the company is the poor condition of roads, especially outside Monrovia. Further expansion of their operation depends upon improved road conditions. As evident from the listing, the agency is not yet operating in Lofa beyond Zorzor, in Nimba beyond Ganta, and through the south-east.

Annex 8: Case Study – The Hunting & Marketing of Bushmeat

Bushmeat, fresh and dried, is a major source of protein for many Liberians. Bushmeat was present in 13/21 markets surveyed, mostly dried. The hunting of many species in Liberia is prohibited by law, but there continues to be a sizeable trade in bushmeat. In 2002, Forest Partners International, working with the Society for the Preservation of Nature in Liberia, conducted a survey of markets and consumers to determine the volume of bushmeat trade and consumer preferences.

There are two types of hunting. First, local residents hunt for their own consumption. Relatively little of this meat enters the market and probably does not have a major adverse affect on the wildlife population. Second, full-time hunters engage in hunting to meet the significant demand for bushmeat in the urban markets of Liberia and elsewhere in West Africa. Bushmeat may be illegally exported to the US and Europe. Marketers perceive bushmeat as one of the more profitable commodities they can sell. For consumers, bushmeat is a delicacy to some, while to others it may be the only meat available. Hunting was reported as the main livelihood for 5% of the surveyed rural population (CFSNS).

The full-time commercial hunters have a greater impact on wildlife populations than the local part-time hunters (BMS 69). The hunters often obtain hunting inputs (shots, wire, etc.) or trade goods from marketers. They go into the high forest where they establish temporary camps and set large numbers of snares or shoot as many as 10 animals per night (BMS 69). Market women may join them to smoke the meat as it is harvested. Meat shipped to Monrovia often goes to wholesalers who then distribute it to cook shops and markets. Dried meat can be stored for 1-2 months if it is properly cured, but if not properly cured, spoils quickly.

The majority of bushmeat goes to Monrovia. Zwedru, Gbarnga, and Tappita are major distribution points (BMS 69). In Zwedru, where meat was stored in a container for shipment to Monrovia, it was estimated that over 10,000 lbs of meat were stored for shipment every two months (BMS 69). In the past, security forces played a key role in the hunting and distribution of meat because they could obtain guns and ammunition and could easily move the meat, bypassing checkpoints.

The most common species marketed are the crop raiding species, including cane rat (or groundhog) and several species of duikers. Consumers indicated support for national wildlife regulations prohibiting hunting, but were not always able to recognize prohibited species in the market.

The majority of the respondents believed that domestic meat was harder to find than before the war (BMS 34). Bushmeat tends to be in greater supply during the rainy season and during the dark phases of the moon. In 2002, bushmeat was often cheaper than domestic meat (cow and chicken). Survey results support an assumption that the lack of inexpensive and readily available domestic meat sources may be increasing the nation's dependency on bushmeat as a meat protein source.

Generally Liberians are more dependent on fish than bushmeat for their protein. In Zwedru and Tappita, however, bushmeat was more available. 96% of the survey respondents reported eating bushmeat (BMS 70). The consumers indicated, however, that if fish or chicken were available at comparable prices, they would prefer those. 68% of the respondents said that they could do without bushmeat (BMS 35). If there was a bigger and more reliable supply of fish and domestic meat, the demand for bushmeat might drop (BMS 70).

In Harper, there is a major trade to the mining camps in the area and across the border to Cote d'Ivoire. While officially the latter is illegal and Ivorian customs officials do attempt to prohibit the trade, it appears that there is a continuing, substantial flow of bushmeat to Cote d'Ivoire where prices tend to be higher than in Liberia.

In total, the report estimated that the urban sale of bushmeat was approximately US\$31.2 million/annum, while rural consumption is estimated at US\$46.8 million, for a total of US\$78 million (BMS)

Annex 9: Research Priorities

The market review is a “snapshot” of the Liberian market system and has focused upon qualitative rather than statistically significant data. The need for additional statistical data on several topics is evident. While not exhaustive, several research priorities are identified that would provide better understanding of the dynamics and potentials for development of the Liberian market system. Among these are:

- Research on the rice distribution network outside Monrovia to determine how to provide reliable year-round supply throughout the country
- Research is needed on the wholesalers and their operations
- Research on costs of production and the demand for various marketable commodities to determine which are most profitable for production and sale
- Research on the profit-margins associated with different commodities and on the start-up requirements of marketing different commodities
- Research on household economies, especially intra and inter-household allocation of labour, cropping calendars especially in terms of labour requirements, and labour demands of different mixes of crops.

Annex 10: List of Identified Markets

No.	Market Name	P-code	District	Frequency	Market Day
Bomi County					
301	Tubmanburg Central Market	LR0400295	Klay	Daily	Daily
302	Joseph Town Market / Tubmanburg	LR0400295	Klay	Daily	Daily
303	Gbasuea Market / Tubmanburg	LR0400295	Klay	Daily	Daily
304	Beafina Market	LR0400024	Klay	Weekly	Tuesday
305	Sass Town Market		Klay	Weekly	Wednesday
306	Klay Market	LR0400208	Klay	Weekly	Friday
307	Guie Town Market		Klay	Weekly	Tuesday
308	Jawajeh Market		Klay	Weekly	Thursday
309	Zordee Market	LR0400334	Klay	Weekly	Saturday
310	Suehn Market	LR0400285	Suehn Mecca	Weekly	Tuesday
311	Gbah Ganga Market		Suehn Mecca	Weekly	Tuesday
312	Vincent Town Market	LR0400297	Suehn Mecca	Weekly	Saturday
313	Mulbah Town Market		Suehn Mecca	Weekly	Tuesday
314	Wehmah Market	LR0400305	Dewien	Weekly	Monday
Bong County					
601	Gbarnga General Market	LR0700187	Jorquelleh	Daily	Daily
602	Jinnepeleta Market	LA0604021	Jorquelleh	Weekly	Monday
603	Gbenequelleh Market	LR0700034	Jorquelleh	Weekly	Tuesday
604	Suakoko Market	LR0700463	Suacoco	Daily	Daily
605	Phebe Market	LE0614007	Suacoco	Daily	Daily
606	Sergeant Kollie Town Market	LR0700445	Suacoco	Daily	Daily
607	Gbokonimah Market	LR0700209	Suacoco	Daily	Daily
608	Fenitoli Market	LR9901382	Suacoco	Weekly	Monday
609	Gbondoi Market	LR0700208	Suacoco	Weekly	Thursday
610	Kolila Market	LR0700262	Suacoco	Weekly	Saturday
611	Zansue Market	LR0700587	Suacoco	Weekly	Saturday
612	Weala Market		Suacoco	Weekly	Friday
613	Salala Market	LR0700427	Salala	Weekly	Friday
614	Totota Market	LR0700485	Salala	Daily	Daily
615	Felala Market	LR0700130	Salala	Weekly	Monday
616	Zowienta Market	LR0700589	Panta-Kpa	Weekly	Friday
617	Palala Market	LR0700407	Panta-Kpa	Weekly	Thursday
618	Bailah Market	LR0700009	Panta-Kpa	Weekly	Tuesday
619	Forquelleh Market	LR0700143	Panta-Kpa	Weekly	Wednesday
620	Belefanei Market	LR0700027	Zota	Weekly	Tuesday
621	Gbalatuah Market	LR0700173	Zota	Weekly	Saturday
622	Gbonota Market	LB0612063	Sanoyea	Weekly	Monday
623	Sanoyea Market	LR0700460	Sanoyea	Weekly	Monday
624	Gbamokollieta Market	LB0612027	Sanoyea	Weekly	Thursday
625	Klebei Market	LR0700279	Sanoyea	Weekly	Tuesday
626	Bong Mines Market	LR0700063	Fuamah	Daily	Daily
627	Handii Market	LR9900623	Fuamah	Weekly	Tuesday
628	Gbrlokpala Market	LR9900552	Kokoyah	Weekly	Thursday
Gbarpolu County					
4501	Bopolu Market	LR0200033	Bopolu	Weekly	Saturday
4502	Gbarma Market	LR0200049	Gbarma	Weekly	Wednesday
4503	Gokala Market		Unknown	Weekly	Tuesday
4504	Weasua Market	LR0200121	Gbarma	Daily	Daily
4505	Tarkpoima Market	LR0200105	Gbarma	Weekly	Wednesday

Grand Bassa County					
901	Buchanan General Market	LR0900184	District #3A	Daily	Daily
902	Looking Market / Buchanan	LA0904100	District #3A	Daily	Daily
903	Mary Clay Market / Buchanan	LR0900970	District #3A	Daily	Daily
904	Tarr Bar Market / Buchanan	LR0900575	District #3A	Daily	Daily
905	Buchanan Red Light Market	LA0904049	District #3A	Daily	Daily
906	Bokay Town Market	LA0904100	District #1	Weekly	Tuesday
907	Vahn Town Market	LR0900970	District #1	Weekly	Saturday
908	Lloydville Market	LR0900646	District #1	Daily	Monday
909	Frazier Town Market	LR0900575	District #2	Weekly	Tuesday
910	St. John Market	LR0900877	District #2	Weekly	Saturday
911	BIA Town Market	LA0904049	District #2	Weekly	Friday
912	Hartford Town Market	LR0900676	District #2	Weekly	Wednesday
913	Geebioh Town Market	LF0908071	District #4	Weekly	Tuesday
914	Gio Town Market	LI0906086	District #4	Weekly	Thursday
915	Nyonben Town Market		District #4	Weekly	Wednesday
916	(Behn) Compound #4 Market	LR0900237	District #4	Weekly	Friday
917	Harmon Market / Yeablow		District #3	Weekly	Friday
918	Dehyu Town Market		District #3	Weekly	Monday
919	Manawon Town Market		District #3C	Weekly	Wednesday
920	German Camp Market	LR0900646	District #2	Weekly	Tuesday
921	SOS Market		District #2	Weekly	Monday
922	Civil Compound Market	LB0906037	District #2	Weekly	Saturday
923	Senyah Market	LR0900877	District #2	Weekly	Friday
924	Gbajay Market	LB0906157	District #2	Weekly	Monday
925	Korkor David Market		District #4	Weekly	Monday
926	Beh's Town Market		District #4	Weekly	Monday
927	Luwein Market	LR0900676	District #3	Weekly	Thursday
928	Moore's Town Market		District #4	Weekly	Friday
929	Siahn Market		District #3	Weekly	Friday
930	Old Lady Market / Tubmanville		District #3	Weekly	Saturday
931	Goe Suah Market	LF0908071	District #3	Weekly	Friday
932	Gorblee / Compound #3	LB0906401	District #3	Daily	Daily
Grand Cape Mount					
1201	Robertspot Market	LR0300318	Commonwealth	Daily	Daily
1202	Vonzula Market	LR0300392	Garwoula	Weekly	Friday
1203	Daniel Town Market	LR0300350	Garwoula	Weekly	Thursday
1204	Ted Market	LR0300362	Garwoula	Weekly	Saturday
1205	Bo Waterside Market	LR0300038	Tewor	Weekly	Saturday
1206	Jennewondi Market	LR0300171	Tewor	Weekly	Friday
1207	Camp 3 Market	LD1210013	Tewor	Weekly	Wednesday
1208	Bamballa Market	LR0300010	Porkpa	Weekly	Tuesday
1209	Madina Market	LR0300259	Garwoula	Weekly	Wednesday
Grand Gedeh County					
1501	Zwedru Central Market	LR1200237	Tchien	Daily	Daily
1502	Toe Town Market	LR1200197	Gbarzon	Daily	Daily
1503	Putu Jawodee Market	LR1200110	Konobo	Weekly	Friday
1504	Gboleken Market	LR1200095	Tchien	Daily	Daily
1505	Tembo Border	LR1200193	Konobo	Weekly	Friday
1506	Zia Town Market	LR1200230	Konobo	Daily	Daily
1507	Zleh Town Market	LR1200235	Gbarzon	Daily	Daily
Grand Kru County					
1801	Barclayville Market	LR1400003	Upper Kru Coast	Weekly	Saturday
1802	Bewnwein Market	LR1400009	Buah	Weekly	Saturday
Lofa County					
2101	Voinjama Market	LR9900002	Voinjama	Daily	Daily
2102	John's Town Market	LR0100203	Voinjama	Weekly	Thursday
2103	Sarkonedu Market	LR0100457	Voinjama	Weekly	Wednesday
2104	Baikadu Market	LR0100012	Voinjama	Weekly	Tuesday
2105	Tenebu Market	LR0100502	Voinjama	Weekly	Wednesday
2106	Kolahun Market	LR0100263	Kolahun	Daily	Daily
2107	Kamatahun Market	LR0100218	Kolahun	Weekly	Friday
2108	Massabolahun Market	LR0100388	Kolahun	Weekly	Wednesday
2109	Popalahun Market	LR0100448	Kolahun	Weekly	Monday
2110	M'babahun Market	LR0100397	Kolahun	Weekly	Friday
2111	Bolahun Market	LR0100065	Kolahun	Weekly	Saturday
2112	Yandamolahun Market	LR0100580	Kolahun	Weekly	Wednesday
2113	Fasawulu Market	LR0100015	Kolahun	Weekly	Tuesday
2114	Foya Market	LR0100136	Foya	Weekly	Saturday
2115	Zorzor Market	LR0100600	Zorzor	Daily	Daily
2116	Konia Market	LR0100283	Zorzor	Weekly	Friday
2117	Fissibu Market	LR0100125	Zorzor	Weekly	Tuesday
2118	Bokeza Market	LR0100063	Zorzor	Weekly	Saturday
2119	Zolowo Market	LR0100459	Zorzor	Weekly	Saturday
2120	Salayea Market	LR0100459	Salayea	Daily	Daily
2121	Sucromu Market	LR0100487	Salayea	Weekly	Wednesday
2122	Kpayea Market	LR0100320	Salayea	Weekly	Tuesday

Margibi County					
2401	Wohn Market	LR0600232	Gibi	Weekly	Tuesday
2402	Weala Market	LR0600228	Kakata	Weekly	Saturday
2403	Yahnwollie Market	LR0600239	Kakata	Weekly	Friday
2404	Peter's Town Market	LR0600184	Gibi	Weekly	Wednesday
2405	Compound (2) Market	LR0600145	Kakata	Weekly	Saturday
2406	Kponpolu Market	LR0600202	Kakata	Weekly	Wednesday
2407	Smell-No Taste / Unification Town	LR0600202	Mambah-Kaba	Daily	Daily
2408	Harbel Market	LR0600100	Firestone	Daily	Daily
2409	Kakata Central Market	LR0600117	Kakata	Daily	Daily
2410	Vai Town Market / Kakata	LR0600117	Kakata	Daily	Daily
2411	Baypulu Market	LR0600008	Kakata	Weekly	Thursday
2412	Bloquelleh Market	LR0600017	Kakata	Weekly	Wednesday
2413	Armbush Curve Market / Kpaye	LR0600135	Mambah-Kaba	Weekly	Thursday
Maryland County					
2701	Harper Market	LR1500055	Pleebo/Sodeken	Daily	Daily
2702	Pleebo Market	LR1500092	Pleebo/Sodeken	Daily	Daily
2703	Barraken Market	LR1500002	Pleebo/Sodeken	Weekly	Tuesday
2704	Karloken Market	LR1500071	Karluway	Weekly	Saturday
2705	Pedebo Market / Border Town	LR1500091	Karluway	Weekly	Thursday
Montserrat County					
3001	12th Street Market		Greater Monrovia	Daily	Daily
3002	Barnersville Market	'LR0500008	Greater Monrovia	Daily	Daily
3003	Bong Mines Pier Market /Logan Town		Greater Monrovia	Daily	Daily
3004	Caldwell Market	LR0500038	Greater Monrovia	Daily	Daily
3005	Chicken Soup Factory / Gardnerville		Greater Monrovia	Daily	Daily
3006	Clara Town Market	LR0500043	Greater Monrovia	Daily	Daily
3007	Dry Rice Market / Gardnerville	'LB3004021	Greater Monrovia	Daily	Daily
3008	Duala Market	'LB3004007	Greater Monrovia	Daily	Daily
3009	Dulala Kuwait 1 & 2		Greater Monrovia	Daily	Daily
3010	Duport Road Market	'LR0500065	Greater Monrovia	Daily	Daily
3011	ELWA Market	'LR0500069	Greater Monrovia	Daily	Daily
3012	ELWA Junction Market		Greater Monrovia	Daily	Daily
3013	Fiama Market		Greater Monrovia	Daily	Daily
3014	Fish Market / Sinkor		Greater Monrovia	Daily	Daily
3015	Freeport Market / Clara Town		Greater Monrovia	Daily	Daily
3016	Supermarket / Gardnerville Road	'LB3004017	Greater Monrovia	Daily	Daily
3017	Gobachop Market / Paynesville		Greater Monrovia	Daily	Daily
3018	Jacob Town Market		Greater Monrovia	Daily	Daily
3019	Jallah Town Market		Greater Monrovia	Daily	Daily
3020	Jamaica Road Market	'LB3004002	Greater Monrovia	Daily	Daily
3021	Lakpazee Market		Greater Monrovia	Daily	Daily
3022	Johnsonville Market		Careysburg	Weekly	Saturday
3023	Bensonville Market	LR0500020	Careysburg	Weekly	Saturday
3024	Careysburg Market	LR0500039	Careysburg	Weekly	Wednesday
3025	Koon Town Market	LR0500019	Todee	Weekly	Saturday
3026	Pleemu Market	LR0500177	Todee	Weekly	Wednesday
3027	Number (7) Market	'LR0500125	Todee	Weekly	Tuesday
3028	Ngen Market		Todee	Weekly	Monday
3029	Logan Town Market		Greater Monrovia	Daily	Daily
3030	Ma Juah Market		Greater Monrovia	Daily	Daily
3031	Matadi Market / Sinkor	'LR9901008	Greater Monrovia	Daily	Daily
3032	Nancy B. Doe Market / Sinkor		Greater Monrovia	Daily	Daily
3033	New Georgia Junction Market	LB3004014	Greater Monrovia	Daily	Daily
3034	New Georgia Market	'LR0500165	Greater Monrovia	Daily	Daily
3035	Old Road Joe Bar Market		Greater Monrovia	Daily	Daily
3036	Paynesville Joe Bar Market		Greater Monrovia	Daily	Daily
3037	Paynesville Red-light Market		Greater Monrovia	Daily	Daily
3038	Rally Time Market /Central Monrovia		Greater Monrovia	Daily	Daily
3039	Shoe Factory Market /Gardnerville		Greater Monrovia	Daily	Daily
3040	Topoe Village Market / New Georgia	'LR0500209	Greater Monrovia	Daily	Daily
3041	Vai Town Market	'LR0500214	Greater Monrovia	Daily	Daily
3042	Water Side Market		Greater Monrovia	Daily	Daily
3043	Water Side-West Point Market		Greater Monrovia	Daily	Daily
3044	Wroto Town Market		Greater Monrovia	Daily	Daily
Nimba County					
3301	Sanniquellie Market	LR0800416	Sanniquellie-Mah	Daily	Daily
3302	New Yekepa Market	LR0800357	Sanniquellie-Mah	Weekly	Saturday
3303	Ganta Market	LR0800170	Sanniquellie-Mah	Daily	Daily
3304	Zuluyee Market	LR0800551	Sanniquellie-Mah	Weekly	Thursday
3305	Gbapa Market	LR0800187	Sanniquellie-Mah	Weekly	Wednesday
3306	L P M Market / Ganta		Sanniquellie-Mah	Daily	Daily
3307	Kanplay Market	LR0800261	Gbehlai-Geh	Weekly	Saturday
3308	Garplay Market	LR0800174	Gbehlai-Geh	Weekly	Saturday
3309	Gowee Market		Gbehlai-Geh	Weekly	Thursday

3310	Loguatu Market	LR9900626	Gbehlay-Geh	Weekly	Thursday
3311	Zuahlay Market	LR0800549	Gbehlay-Geh	Weekly	Wednesday
3312	Kpairlay Market	LR0800287	Gbehlay-Geh	Weekly	Tuesday
3313	Saclepea Market	LR0800263	Saclepea-Mah	Daily	Daily
3314	Flumpa Market	LR0800153	Saclepea-Mah	Weekly	Wednesday
3315	Kpain Market	LR0800293	Saclepea-Mah	Weekly	Saturday
3316	Duo Market	LR0800145	Saclepea-Mah	Weekly	Saturday
3317	Bunadin Market	LR0800094	Saclepea-Mah	Weekly	Wednesday
3318	Bahn Market	LR0800009	Zoe-Geh	Daily	Daily
3319	Buutuo Market	LR0800098	Zoe-Geh	Weekly	Friday
3320	Gbloulay Market	LR0800203	Zoe-Geh	Weekly	Tuesday
3321	Bayleglay Market	LA3312007	Zoe-Geh	Weekly	Tuesday
3322	Tappita Market	LR0800445	Tappita	Daily	Daily
3323	Zekepa Market	LR0800526	Yarwein	Daily	Daily
River Cess County					
3601	Yarpah Town Market	LR1000237	Central C	Weekly	Monday
3602	Little Liberia Town Market	LD3604020	Timbo	Weekly	Friday
3603	Darsaw Town Market	LR1000065	Timbo	Daily	Friday
3604	Longan Town Market	LB3602003	Timbo	Weekly	Saturday
3605	Bodouwea Town Market	LR1000041	Monweh/District #5	Weekly	Wednesday
3606	Boegezaye Town Market	LR1000035	Monweh/District #5	Weekly	Thursday
3607	Sayah Town Market	LR1000187	Nylewien	Weekly	Friday
3608	Karnqbo Town Market	LR1000135	Monweh/District #5	Weekly	Monday
3609	Cestos City Market	LR1000182	Timbo	Daily	Daily
River Gee County					
4201	Fish Town Market	LR1300012	Webbo	Weekly	Thursday
4202	Kaweken Market	LR1300049	Gbeapo	Daily	Daily
4203	Gbawinken Market	LA4202043	Gbeapo	Weekly	Friday
4204	Putuken Market	LR1300093	Gbeapo	Weekly	Saturday
Sinoe County					
3901	Greenville Central Market	LR1100057	Greenville	Daily	Daily
3902	Po River Market / Greenville	LD3906002	Greenville	Daily	Daily
3903	Seebeh Market / Greenville	LD3906009	Greenville	Daily	Daily
3904	Tubmanville Market	LR1100208	Kpanyan	Weekly	Friday
3905	Jacksonville Market	LR1100060	Tarjuowon	Daily	Daily
3906	Geetroh Market		Sanquin	Weekly	Saturday
3907	Pyne Town Market	LR1100157	Pyneston	Daily	Daily

Annex 11: Location of Markets in Greater Monrovia



Annex 12: Location of Markets in Liberia

