Introduction

The purpose of this bulletin is to inform WFP programme unit and WFP partners about the trends of key factors influencing food security in Sierra Leone. The bulletin is based on secondary data and will in due course include primary data collected by WFP staff in collaboration with other agencies.

Summary

• The overall food security situation is relatively stable, despite the fact that the supply of rice, which is the staple food, is challenging in terms of meeting the national requirements. Harvesting of rice, will be completed by end December. Due to below normal rainfall during the beginning of the cropping season, rice production is expected to be slightly below that of 2008, which was higher than the five-year average.

• The prices of imported rice vary throughout the various markets. From August till October, the price trends of both imported and local rice decreased or stabilized in most markets, including Freetown, Bo, Kenema and Makeni.

• Purchasing power (measured by terms of trade) of wage earners in urban areas improved due to lower consumer prices for rice, while that of cash crop farmers deteriorated due to a drop in the wholesale price of coffee.

• About 29 percent of the population in Sierra Leone has inadequate food consumption. Both in urban, peri-urban and rural areas food constitute up to 50 percent of the household’s monthly expenditures, indicating wide-spread poverty and potentially food insecurity.

• Recent survey revealed that 3.8 percent of children below 5 years in Moyamba district of southern Sierra Leone reportedly suffer from severe acute malnutrition. Overall however 36 percent of children below five years of age in Sierra Leone are stunted, 21 percent underweight and 10 percent were wasted (SSL 2008). The under-five mortality rate is 26 percent.

This bulletin reports on the following indicators:

Rainfall anomalies, GDP, Inflation, CPI, ToT, price trends, Food consumption, nutrition and morbidity.

For any questions on this bulletin, contact:

Christa Rader, Country Director Sierra Leone christa.rader@wfp.org
Ellen Andresen, Head VAM Sierra Leone ellen.andresen@wfp.org

1 October 2009, Joint CILSS/FAO/FEWSNET pre-harvest assessment mission of the 2009/10 cropping season in Sierra Leone.
1.0 Underlying conditions

Environmental conditions

Sierra Leone has a unimodal rainfall pattern with a rainy season from May through October. Particularly during July through September the country usually experiences heavy rains, which makes the interior of the country largely inaccessible. Being a coastal country, Sierra Leone does not experience extreme droughts, although the Northern Province may be affected by the dry winds of the Harmattan during December/January. In 2009 the rains started later than usual, followed by below normal rainfall in the month of July. During August/September the country experienced heavy rains that led to flooding in the Southern Province. Below normal rainfall was again experienced during September/October. Interpolated estimated rainfall prepared by FAO is shown in Annex 1. Note also that Sierra Leone has plenty of water resources including nine river systems and streams, which provides an abundance of irrigable land.

Economic conditions

During 2006-2008, Sierra Leone experienced a relatively stable GDP growth. However, inflation has an upward trend, reaching a peak in mid-2008. GDP growth is expected to be lower in 2009, an is inflation.

Table 1. Selected economic indicators (source: GoSL/WFP 2008)

<table>
<thead>
<tr>
<th>Indicator</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>Real GDP growth (%)</td>
<td>7.4</td>
<td>6.4</td>
<td>6.0</td>
<td>4.8</td>
</tr>
<tr>
<td>Consumer price inflation (%)</td>
<td>9.7</td>
<td>11.7</td>
<td>14.0</td>
<td>12.5</td>
</tr>
<tr>
<td>Exchange rate USD:Le</td>
<td>2,692</td>
<td>2,985</td>
<td>3,050</td>
<td>3,420</td>
</tr>
</tbody>
</table>

While consumer prices had showed a declining trend during the first months of 2009, prices began to increase again by mid-2009. Thus, by October inflation had reached a year-on-year rate of 11 percent, indicating a general increase in the cost of living where income levels remain unchanged.

Table 2 Consumer Price Index and Year-on-Year percent changes in CPI (2003=100)

<table>
<thead>
<tr>
<th>National CPI</th>
<th>Freetown CPI</th>
<th>Kenema CPI</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPI Y-Y % change</td>
<td>CPI Y-Y % change</td>
<td>CPI Y-Y % change</td>
</tr>
<tr>
<td>Jan-08</td>
<td>169.6</td>
<td>170.68</td>
</tr>
<tr>
<td>Apr-08</td>
<td>178.39</td>
<td>179.37</td>
</tr>
<tr>
<td>Jul-08</td>
<td>186.02</td>
<td>184.7</td>
</tr>
<tr>
<td>Oct-08</td>
<td>189.32</td>
<td>184.7</td>
</tr>
<tr>
<td>Jan-09</td>
<td>186.15</td>
<td>186.2</td>
</tr>
<tr>
<td>Apr-09</td>
<td>188.09</td>
<td>187.45</td>
</tr>
<tr>
<td>Jul-09</td>
<td>203.05</td>
<td>195.6</td>
</tr>
<tr>
<td>Oct-09</td>
<td>210.13</td>
<td>204.23</td>
</tr>
</tbody>
</table>

Source: Statistics Sierra Leone 2006-2009
2.0 Availability

Supply/demand

The main staple food in Sierra Leone is rice, mainly domestically produced with some imports. Imports may reach 15 to 30 per cent of total supply, although increasing domestic production has reduced the import dependency since 2000/02.

In 2008, and according to MAFFS figures, 475,592 Ha was cultivated with an output of 680,097 Mt of paddy rice, which corresponds to 408,058 MT of milled rice. This reflects a supply/demand ratio of 72 per cent, which however does not take into consideration the carry-over of stocks from the previous year.

For 2009, MAFFS estimates a cultivated area of 523 thousands Ha with a total output of about 784 thousand MT of paddy rice. However, due to the weather conditions mentioned above actual production is unlikely to reach the indicated level. Nevertheless, the import dependency ratio is expected to maintain a declining trend.

Markets and prices

In the past 2 years, the prices of basic food commodities such as rice, palm oil, vegetables and fish have risen sharply. The trend in food price increases is expected to be the same in December 2009. Notable is the increase in price of local rice above that of imported rice in some markets while in others imported rice is increasing above that of local rice.

The nominal prices of imported rice on various markets are shown in figure 1 below. The figure shows that the price of imported rice was higher in Kailahun than the rest of the country. This could be due to the difficulty of reaching this area in the rainy season because of bad road conditions. The fact that the price of local rice was higher in Makeni than in other markets in August and September may be due to a high local demand compared to supply in this area in these months.
3.0 Access

Terms of trade

The terms of trade in Freetown between labour wages and imported rice increased from August to October, meaning that for the same work you get more food in October. This is related to the decrease in price of imported rice in Freetown in October while the wages remained stable.

Table 1. Terms of trade labour wage/imported rice, Freetown

<table>
<thead>
<tr>
<th></th>
<th>Aug-09</th>
<th>Sep-09</th>
<th>Oct-09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Labour wage (Le/day)</td>
<td>5000</td>
<td>5000</td>
<td>5000</td>
</tr>
<tr>
<td>Imported rice (Le/kg)</td>
<td>2800</td>
<td>2370</td>
<td>2307</td>
</tr>
<tr>
<td>Terms of trade</td>
<td>1.79</td>
<td>2.11</td>
<td>2.17</td>
</tr>
</tbody>
</table>

The terms of trade between coffee and local rice in Kailahun, a major coffee growing district, are half in October compared to August, meaning that the coffee farmers will get half of the amount of rice for the same amount of coffee in October compared August. The change in terms of trade is due to the decrease in the price of coffee by 56 percent from August to October.

Table 2. Terms of trade coffee/local rice, Kailahun

<table>
<thead>
<tr>
<th></th>
<th>Aug-09</th>
<th>Sep-09</th>
<th>Oct-09</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coffee (Le/kg)</td>
<td>2169</td>
<td>1132</td>
<td>1132</td>
</tr>
<tr>
<td>Local rice (Le/kg)</td>
<td>2583</td>
<td>2666</td>
<td>2500</td>
</tr>
<tr>
<td>Terms of trade</td>
<td>0.84</td>
<td>0.42</td>
<td>0.45</td>
</tr>
</tbody>
</table>

Households dependent more on coffee production as a means of livelihood are likely to be more affected by the general inflation. (See section on economic conditions).
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Food consumption

More than 80 percent of households in Sierra Leone have reported that their constraint to have proper food consumption is rather economic access to food than availability of food (GoSL/WFP 2007). According to the VAM 2007 study, 29 percent of the population in Sierra Leone had poor or borderline food consumption in 2007. The situation was worst in Bonthe district in the South where nearly 60 percent of the population had poor or borderline food consumption. From 2005 to 2007, the situation got worse in Western Area, Port Loko, Kono and Kailahun (GoSL/WFP 2005, GoSL/WFP 2007).

In Freetown, more than 95 percent are dependent on purchasing their food (ACF 2008, WFP 2009). Both in urban, peri-urban and rural areas, almost 50 percent of household expenditures are on food, indicating poverty (GoSL/WFP 2007, WFP 2009).

More recent reports of food consumption indicate an increasing trend in households with adequate food consumption after the war. There is a reported increase in dietary diversification through consumption of cassava and sweet potatoes. Reports indicate an increasing production of these roots and tubers which far exceeds the national requirements.

4.0 Utilization

Nutrition

In 2008, 36 percent of children below five years of age were stunted, 21 percent were underweight and 10 percent were wasted (SSL 2008). Moyamba and Port Loko districts showed the highest rates of stunting (46 and 44 percent respectively), whereas Bo, Kambia and Bonthe showed most wasting (16, 15 and 14 percent respectively).

A recent nutrition survey (December 2009), carried out by Action Against Hunger (ACF International) revealed that 3.8 percent of children in Moyamba district of southern Sierra Leone, suffer from severe acute malnutrition. The region of Moyamba possesses little in the way of public health infrastructure, including few trained hospital staff to successfully treat childhood malnutrition.

Note also that exclusive breastfeeding is not commonly practiced in Sierra Leone, only 8 percent breastfeed exclusively for 6 months (UNICEF 2009).

Diseases/morbidity

In Sierra Leone you find some of the highest under-five mortality rates in the world. 1 in 4 children will not reach the age of five years (UNICEF 2009).

The most common diseases in the country are malaria and diarrhoea. Both of these diseases are easy to prevent and cure – but due to inadequacies in the health care system in Sierra Leone the diseases are in many cases fatal for young children in the country.

2 October 2009, Joint CILLS/FAO/FEWSNET pre-harvest assessment mission of the 2009/10 cropping season in Sierra Leone.
References

GoSL/WFP 2008, *Rapid Food Security Assessment in Western Area, Sierra Leone*, Government of Sierra Leone and World Food Programme
SSL 2008, *Sierra Leone Health and Demographics Study 2008*, Statistics Sierra Leone and ICF Macro
WFP 2009, *Rapid Food Security and Vulnerability Assessment among the main livelihood groups in Eastern and Southern Provinces and in Western Area of Sierra Leone*, World Food Programme

Annex 1.

Sierra Leone: Interpolated Estimated Rainfall in 2009. (Source FAO/GIEWS)