Guinea, Liberia and Sierra Leone
In spite of seasonal declines, negative coping remains high in areas exposed to EVD

Highlights

- Households are continuing to rely on high levels of negative coping mechanisms in Kailahun, Sierra Leone, and in Lofa County, Liberia – areas that were food-secure before the crisis. Ebola-induced food insecurity remains a serious concern.

- In the Nzerekore Region of Guinea and in the central zone of Liberia, households are using fewer negative coping strategies compared to November. In other zones, levels of negative coping strategies have remained constant over the past month.

- Generally, local rice prices are in seasonal decline and imported rice prices are stable or falling. Palm oil prices are stable or increasing in Liberia as markets resume, but they are falling in Sierra Leone, contrary to usual seasonal trends.

- While wage-to-rice terms of trade are improving in most areas of Guinea and in southern and eastern Sierra Leone, they are declining in Liberia and in areas of Sierra Leone that are experiencing continued EVD transmission.
EVD incidences remain intense in Sierra Leone

In Sierra Leone, EVD incidence rates remain intense. Freetown, the capital, continues to be the worst-affected area, however incidence rates remain high in much of the country, except for the south.

<table>
<thead>
<tr>
<th>Country</th>
<th>Week to Nov 30</th>
<th>Week to Nov 28</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guinea</td>
<td>77</td>
<td></td>
</tr>
<tr>
<td>Liberia</td>
<td>43</td>
<td></td>
</tr>
<tr>
<td>Sierra Leone</td>
<td>537</td>
<td></td>
</tr>
</tbody>
</table>

Source: WHO December 3 Situation Report

Montserrado County, which includes the capital Monrovia, accounted for 79 percent of all confirmed cases during this period, whereas Lofa County experienced no new cases during this time.

Methodology

In December, data was collected by SMS from a sample of 800 respondents in Liberia and 836 in Sierra Leone; 465 respondents in Guinea participated through interactive voice response (IVR). The data collection mode may impact responses to the rCSI module.

To the extent possible, this survey targeted respondents from the two previous data collection rounds. Due to a low sample in Middle Guinea, the results for that region have a wider margin of error than the others. In December, an open-ended question was added to the survey. Further details on methodology are available on the mVAM website.

Negative coping levels decline in Forest Guinea and in Liberia’s central zone, while remaining high in areas most exposed to the EVD epidemic

The reduced coping strategies index (rCSI) expresses the frequency and severity of the mechanisms that households use to access food. The more coping strategies households implement, the higher the rCSI. Past rounds have tended to show higher levels of negative coping in rural areas that had the highest cumulative EVD cases.

As shown on the regional map, among the three countries, the rCSI is highest in the eastern districts of Kailahun (rCSI=18.3) and Kono (rCSI=17.8) in Sierra Leone; in Lofa County (rCSI=19.6) and the western zone that includes Grand Cape Mount, Gbaroplu and Bomi Counties in Liberia (rCSI=20.6); and in Forest Guinea (rCSI=22.8) in Guinea. As in previous rounds, lower rCSI levels are observed in Monrovia (rCSI=14.8) and Freetown (rCSI=14.8), compared to other areas of Liberia and Sierra Leone (see figure 1).

Compared to November, the rCSI declined this month in Forest Guinea (p=0.04) and in a central zone of Liberia that includes the counties of Bong, Margibi and Nimba (p=0.10). In Forest Guinea, wage-to-rice terms of trade have steadily improved since October, which may explain the decline in rCSI, in spite of the persistence of EVD transmission in that area. In Liberia’s market-dependent central zone, the decline in rCSI may reflect improved economic conditions in an area where the number of EVD cases has decreased in the past month. Month-to-month variations in the rCSI in other monitored zones are not statistically significant.

While the rCSI has been improving since October in some areas that were initially hard hit by the EVD epidemic including Lofa County, Liberia, and Kailahun District, Sierra Leone, negative coping remains above average. This is an anomaly, as these places were better off than others in terms of food security, according to baseline surveys conducted before the EVD outbreak. This could indicate an impact of EVD on markets, livelihoods and food consumption that may outlast the epidemic. This hypothesis could be better understood through face-to-face household food security and livelihoods assessments, once they become feasible.

Figure 1: Reduced Coping Strategies Index for October, November and December 2014

Source: WFP mVAM. October 2014 IVR results for Liberia excluded
Local rice prices decline, while obstacles to trade remain

In Sierra Leone, restrictions on movement continue to be in force in the districts of Moyamba, Bombali, Port Loko and Kenema (ICG report). On 1 December, the restrictions were extended to Tonkolili. In Liberia, 40 percent of respondents to a mid-November FEWS NET survey reported that markets were operating at a reduced level or were closed, most commonly in the Ebola-affected counties of Lofa, Bong, Montserrado, Margibi and Nimba. Since the end of the state of emergency, many closed markets have reopened in Monrovia. In Guinea, informal restrictions on movement exist in some areas. For instance, informal quarantine and movement restrictions are reported in Upper Guinea (in select villages around Kerouane) and in Forest Guinea.

Economic impact of movement restrictions in the words of SMS survey respondents:

- “Some market goods are perishing due to the lockdown” – male respondent in Sierra Leone
- “We live near the Liberian border and with the border closed, all our economic life came to a standstill” – male respondent in Sierra Leone
- “I have 60 bags of cassava but due to travelling being restricted, I am looking for customers to buy my goods quickly” – female respondent in Lofa County, Liberia

In spite of these disruptions, according to the mVAM data, local rice prices continue to decline, as expected following the main harvest. In Sierra Leone, local rice prices have dropped by over 10 percent in the Southern and Eastern Provinces in December. The decline has been less pronounced in Northern Province (-3%), and prices have remained stable in Western Area. In Guinea, local rice prices dropped by between 3 and 10 percent across the country in December. In Liberia, where local rice production is less abundant, prices have fallen by over 10 percent in Lofa County and in the south east, while increases are noted in rice-deficit areas such as the central zone, the west and Montserrado County. Data shows that the retail price of a bag of imported rice remained stable in Guinea, while it decreased slightly in both Sierra Leone (-4%) and Liberia (-6%). Imported rice prices have generally been less volatile than local rice prices since October.

Table 2: Rice price trends, November to December 2014

<table>
<thead>
<tr>
<th></th>
<th>Local</th>
<th>Imported</th>
</tr>
</thead>
<tbody>
<tr>
<td>Guinea</td>
<td>-7%</td>
<td>0%</td>
</tr>
<tr>
<td>Liberia</td>
<td>+1%</td>
<td>-6%</td>
</tr>
<tr>
<td>Sierra Leone</td>
<td>-7%</td>
<td>-4%</td>
</tr>
</tbody>
</table>

Responses indicated that palm oil prices in Sierra Leone have fallen between 8 to 12 percent compared to November in Eastern and Southern Provinces, whereas they typically increase at this time of year. This anomalous trend could signal income and food access problems for palm oil selling households. By contrast, palm oil prices are stable or increasing in Liberia, including in Lofa County.

In Liberia and Sierra Leone lower wage levels weaken terms of trade

In Liberia, wage rates have dropped by 12 to 20 percent since November in all monitored areas, as demand for labour is likely declining in the post-harvest period. The drop is steeper in western counties (-33%), possibly as a consequence of the increased EVD caseload. Wage rates continue to be less than $L200/day in Lofa County, the second lowest in the country. In Sierra Leone, wages have improved, notably in the south east, as the lowland rice harvest continues. Nonetheless, wage rates in eastern districts, at 10,000 Leones/day, remain 8 to 20 percent below those reported in other areas of the country. Although they have improved since October, the lowest wage-to-staple-food terms of trade continue to be observed in Lofa County in Liberia and in Eastern Province in Sierra Leone.
In both areas, low wage levels are the drivers of these low terms of trade: “It's not the price of commodities that is high but rather the wages are low,” remarked one respondent in Sierra Leone. Palm-oil-to-rice terms of trade appear low in Kailahun, which may limit the purchasing power of palm oil producers. By contrast, people’s purchasing power has increased in Forest Guinea since October, thanks to an increase in wage rates and lower local rice prices (see figure 2).

The data shows that since October, wage-to-local-rice terms of trade have improved in Southern and Eastern Provinces of Sierra Leone, in Lofa County, Liberia, and across Guinea, save for Conakry – in line with a seasonal post-harvest trend. However, declining food purchasing power is noted in Northern Province and Western Area of Sierra Leone, both areas with high EVD incidence rates. In Liberia, wages have declined more than imported rice prices, leading to a reduction in wage-to-imported-rice terms of trade, with the decline being sharpest in the western zone that includes the counties of Bomi, Gbaroplu and Grand Cape Mount, areas where EVD transmission continued in November (see figure 3).

**Conclusion and Outlook**

As of December, food security patterns have not returned to baseline levels. According to baseline surveys, Lofa County, Liberia, and Kailahun District, Sierra Leone were relatively food secure prior to the outbreak. However, the rCSI remains abnormally high in these areas despite the fact that EVD incidence has dropped to virtually zero over the past month. Clearly the situation has not returned to normal. This could indicate an impact of EVD on livelihoods that will outlast the epidemic, and should be investigated further.

Although wage-to-staple-food terms of trade are improving in many areas, they are declining unseasonably in Northern Province and Western Area in Sierra Leone and in western Liberia, possibly the result of the effects of EVD on food and labour markets.

In January, household food availability and income are typically more buoyant than at other times of the year, as households will rely on stocks from their own production and have revenue from cash crops.

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