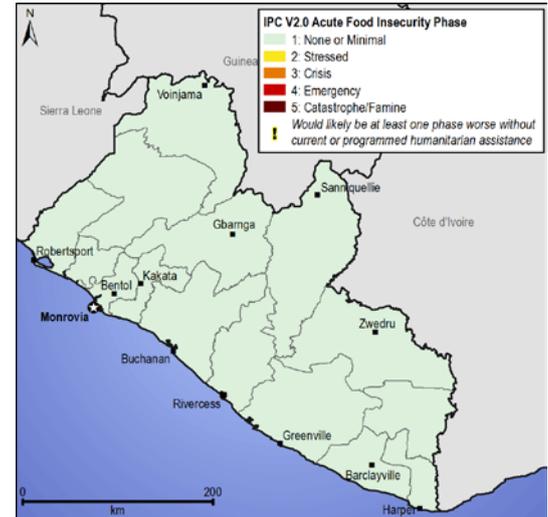


Cultivation activities for 2017 main season are expected to start on time

KEY MESSAGES

- Normal timing of the lean season is expected from June to September, following an on time start to the 2017 main season cultivation. During this period, cassava stocks, imports, and incomes from off-season harvests are expected to ensure both household and market supplies. Access to food and seasonally normal consumption levels are expected in most households, in line with Minimal (IPC Phase 1) acute food insecurity, through at least September 2017.
- Across the country, some poor households are accessing wage labor through main season land preparations including bushing, felling, burning and clearing which started in December. Availability of work will likely increase during planting of rice, cassava, corn, peanuts and beans from March through June. Weeding and fencing in July/August and rice harvests in August/September in the southeastern region will keep availability of work at seasonally average levels through the scenario period.
- Some poor households including farm and fishing laborers, casual mine workers and rubber tappers, who make up less than 20 percent of the total population in their districts, are facing Stressed (IPC Phase 2) acute food insecurity through the scenario period. These households have reduced purchasing power as they face weak financial access to both imported food and non-food items due to depreciation and weak demand for wage labor in their livelihood zones.

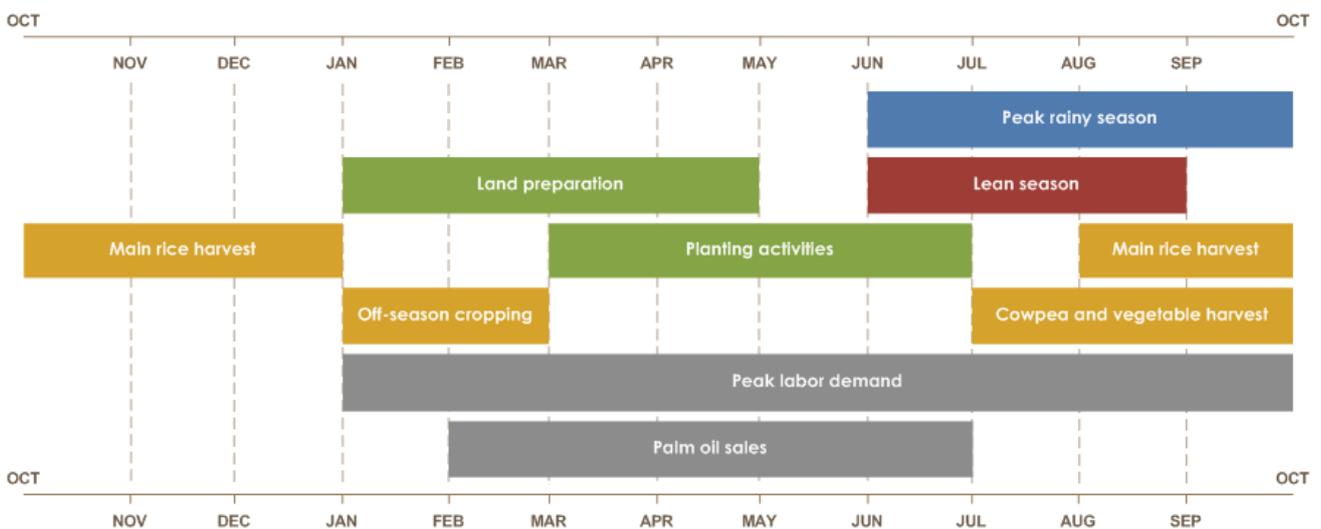
Current food security outcomes for February 2016



Source: FEWS NET

This map represents *acute* food insecurity outcomes relevant for emergency decision-making. It does not necessarily reflect *chronic* food insecurity. Visit www.fews.net/IPC for more on this scale.

SEASONAL CALENDAR FOR A TYPICAL YEAR



Source: FEWS NET

NATIONAL OVERVIEW

Current Situation

Rural livelihood activities

Main season agricultural activities started in December/January with land preparations including selection of sites and bushing and felling of brush. Additionally, seasonally normal levels of fishing in the [Coastal Fishing and Cassava Livelihood Zone](#) have been providing poor rural households with access to in-kind and wage opportunities including hauling, loading, processing and selling of fish, firewood, baskets and bamboo for drying fish. These activities along with the rehabilitation of tree/cash crops, cultivation and weeding of off-season crops, palm oil and charcoal production, and processing and selling of cassava have been making wage labor contracts and household incomes available at seasonally normal levels. Many of these activities will increase and are likely to continue to provide work opportunities for poor households at seasonal average levels from February through May. Women and elderly people will increase petty trade, backyard gardening and fishing for crayfish and crabs at typical seasonal levels June through September. During the rainy season between June and September, most agricultural activities will slow down and farmers will be weeding and fencing to protect crops. The rice cropping in the Southereaster Region has started on time making it likely that harvests will start normally in July/August. More farmers than usual are using the “Kuu” systems or mutual labor in order to save costs, especially in the [Coastal Plain Cassava with Rice and River Fishing Livelihood Zone](#) where farmers reported hiring fewer workers due to increasing wage rates.

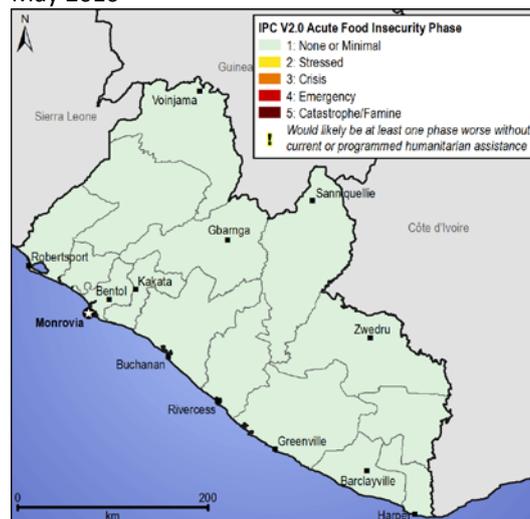
Investment and economic recovery

GDP declined from 2015 to 2016 and economic recovery remains slow as major export sectors, particularly rubber and iron ore, are still very weak despite some improvement in prices on international markets. As of 2014, iron ore and rubber prices remain atypically low on international markets and reports from the Central Bank of Liberia (CBL) indicate that proceeds from these commodity exports declined significantly in 2016 compared to 2015. Major imports, including petroleum and rice also decreased in 2016 compared to 2015 and CBL also indicates that prices of most commodities have been rising due to depreciation of the Liberian Dollar (L\$) against the US dollar. The official value of the L\$ declined by almost 15 percent in January 2017 compared to January 2016, and likely had even lower values in central markets and goods outlets like Waterside and Red Light where demand for USD is higher. Currency depreciation, added tariffs on goods and services, and concurrent use of both US and Liberian dollars currencies triggered a 3-day strike and protests by vendors in Monrovia in January.

Staple food stocks and prices

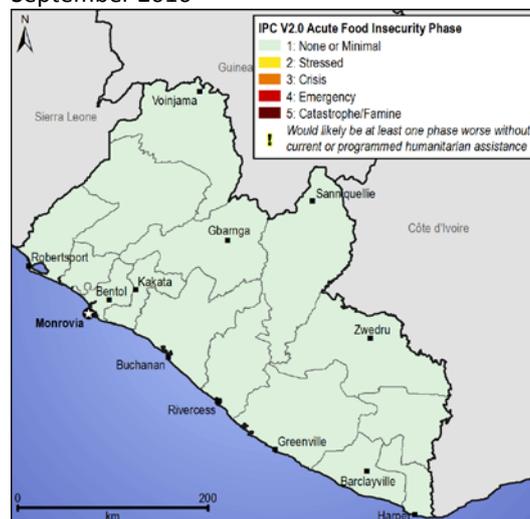
Reports from the Central Bank of Liberia indicates that rice imports declined in 2016 compared to 2015, likely due to the depreciation of the Liberian dollar. According to the Ministry of Commerce and Industries (MOIC), current buffer stocks will last up to mid-April although they plan to keep stocks at average levels through the year. Local market prices for imported rice remain above-average (Figure 1). Local rice production levels in 2016 are 8 percent lower than last year's production levels according to official estimates. Most farmers completed harvesting in November/December, and during a recent FEWS NET/MOA/LISGIS assessment, some households reported saving their stocks for seeds and consumption during the lean season (July – September). Cassava production is currently in surplus and some households are substituting rice consumption for cassava which is in line with reports that processed cassava products (gari, fufu and dippa) are very cheap, selling at prices lower than last year's prices because of weak demand and oversupply on local markets.

Projected food security outcomes, March to May 2016



Source: FEWS NET

Projected food security outcomes, June to September 2016



Source: FEWS NET

These maps represent *acute* food insecurity outcomes relevant for emergency decision-making, and do not necessarily reflect *chronic* food insecurity. Visit www.fews.net/IPC for more on this scale.

Humanitarian Assistance

International partners are generally supporting economic recovery and development efforts as Liberia does not have food aid or emergency response programs at the moment. Programs on livelihoods, food security, agriculture, infrastructure, health, water and sanitation are targeted mainly to smallholders, agribusinesses, women, school children, Ebola survivors, and orphans. Some recently approved programs include a Ministry of Gender led program to improve social protection and reduce violence against women and a Ministry of Agriculture (MOA) program to re-establish its statistics and management information systems. Agriculture and nutrition stakeholders also began a program to better integrate nutrition into the government's agricultural plan and actions framework. In terms of assistance around physical security, the UN peacekeeping mission is likely to remain in Liberia to support a peaceful transition to the new government through 2017. UNDP is supporting an Election Project to ensure capacity for Liberians to hold free, fair and democratic elections. The election registration process was completed on time in January and a smooth campaigning process is expected from July through September.

Assumptions

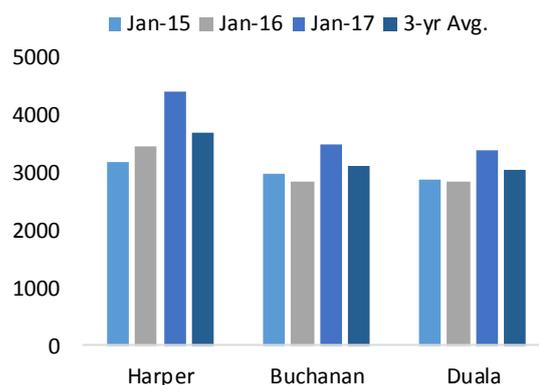
The most likely scenario for the February to September 2017 period is based on the following national level assumptions:

Rainfall: The rainy season is expected to start on-time in Liberia, with regional forecasts predicting the start of rains in bimodal areas in late February/early March. Rainfall levels are expected to be similar to average, supporting normal, agricultural season progress, especially for planting of main season crops and development of off season crops in February through May. As usual between June to September, heavy rains will likely slow down activities and demand for labor at seasonally normal levels.

Agricultural harvests: Between February and June, harvests and sale of palm nuts and oil will provide average incomes and stock levels. Off-season harvests at this time will also increase household and market supply of vegetables and tubers. Cassava will be harvested throughout the scenario period, and will be substituted for rice consumption by some households during the lean season from June to September. Heavy rains will slow down harvest and supply of cassava products including gari, fufu and dippa/flour, which will decline at seasonally average levels from June to September. Between August and September, the main rice harvest will begin normally in southeastern areas and spread across the country at expected average levels.

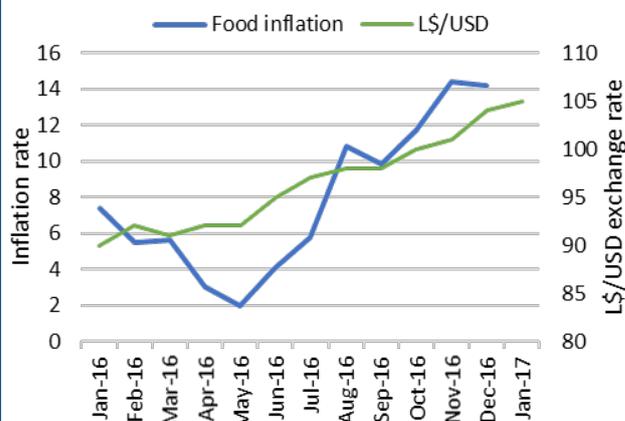
Markets accessibility: Between February and May, improved road conditions and transport flows during the dry season will likely increase market stock and supply at seasonally normal levels. Availability of agricultural contracts and incomes (in-kind food for labor and cash) will likely increase at seasonally average levels, although there may be a reduced demand in some localized areas as high costs of labor decrease demand for workers. During the June to September heavy rains transport flows and market supplies, especially for imported goods, will drop at seasonally low levels due to expected deterioration of road conditions.

Figure 1. Price of 50 kg bag of imported rice (in Liberian dollars)



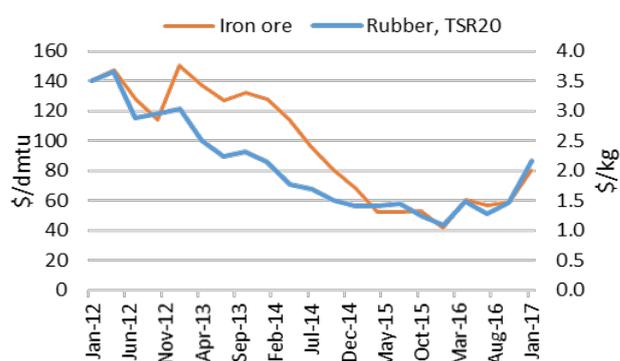
Source: LISGIS/MOA

Figure 2. Liberian dollar to US dollar exchange rate and Food Inflation rate (CPI)



Source: Central Bank of Liberia

Figure 3. Historical international rubber and iron ore prices (in USD)



Source: World Bank Commodity Price Data (Pink Sheet)

Depreciation of the Liberian Dollar (L\$): USD to L\$ exchange rate is expected to keep declining through September 2017 as low international market prices continue to drive down revenues from rubber and iron ore exports, which are mainly responsible for USD inflow and supply.

Staple food supplies: Local rice stocks from the main harvests in 2016 are expected to remain adequate in most households from February through June 2017. Most households stockpiled some of their 2016 harvests in November/December for seeds and consumption up to September 2017, in anticipation of sharp imported rice price increases during lean period (June – September).

Imported rice and fuel stocks/ prices: Imported rice and fuel buffer stocks are expected to diminish, but remain adequate, due to reduction in imports mainly as a result of depreciation. Reports from the Central Bank of Liberia indicate that rice and fuel imports in 2016 decreased by 20 and 22 percent respectively, and levels this year may follow similar trends. Current stocks in warehouses in Monrovia will ensure supplies on the local markets up to mid-April. Prices throughout the scenario period are expected to remain above-average and continue rising in coming months because of depreciation.

Labor demand and supply: During the peak of the rainy season from July to September livelihood activities will slow down normally and demand for labor (hauling and processing cassava and fish) will likely decline at normal seasonal levels. There may be a slight decrease in labor demand for agriculture cultivation, as increased wages cause more farmers to shift to Kuu labor setups.

Fuel prices and transportation costs: Official fuel prices, which were increased slightly because of depreciation, will remain stable, although in isolated, rural areas, fuel and transportation costs will increase at above average seasonal levels during the rainy season due to poor road conditions. Transportation costs have increased atypically in line with rising fuel prices and constant depreciation of the L\$ on local markets. Current high transportation costs are expected to exceed normal seasonal average levels during the July - September heavy rains when bad road conditions prevail.

Rubber prices: Local prices will remain atypically low as demand for raw rubber continues to be weak on international markets. As usual, rubber production will decline seasonally during the peak of the rainy season (July to September).

Most Likely Food Security Outcomes

All areas of Liberia will remain in Minimal (IPC Phase 1) acute food insecurity between February and September 2017 due to seasonally normal incomes and food sources. Cassava is in surplus and will be affordable during the scenario period, while local rice stocks, regular rice imports, and off-season harvest are expected maintain sufficient food availability and access on the markets from February through June. However, some poor households including casual contract laborers and poor rubber tappers (making up less than 20 percent of the total population) will be Stressed (IPC Phase 2) acute food insecurity during the scenario period due to depreciation, weak demand for wage laborers, and reduced purchasing power particularly for imported foods and non-food items.

AREA OF CONCERN

Poor households (making up less than 20%) surviving on farming and fishing wage and in-kind labor

Current Situation

The [Coastal Plain Cassava with Rice and River Fishing Livelihood Zone](#) stretches from Grand Cape Mount to Maryland County, including parts of Bomi, Grand Bassa, Rivercess, Grand Kru, and Sinoe counties. Lake Piso as well as St Paul, St. John, Loffa, Maffa, Cestos and Timbo Rivers provide access to food and livelihoods for most households, which are made up of fishers, farmers, wage laborers and producers of charcoal. Poor households survive on wage and in-kind labor, mainly for farming, charcoal production and fishing, as well as selling bush products such as bamboo and firewood. Charcoal production, main season land preparations, and planting and weeding of off-season crops are currently making incomes available for poor households. Demand for fishing labor (in-kind and wage) is currently weak after a normal, seasonal break from October to December. Regular fishing activities will start again in February and

between April and June the lake and river water levels will rise, increasing the availability of fish, overall activities and labor contracts. As usual before then, some fishers and laborers from the zone (mostly women and youths) will be contracting labor in the [Coastal Fishing and Cassava Livelihood Zone](#) where normal fishing activities started in September. Current labor activities include offloading boats, hauling and processing fish. Demand for workers, however, is reported to be declining as labor costs have sharply increased due to the USD to L\$ exchange rate. Wage rates compared to January last year are up by 75 to 100 percent and fishing equipment costs are atypically high following a ban of used nets. Authorities are requiring fisherman to use new types of nets which are more expensive in order to preserve certain species in the Lake and rivers.

For agricultural production and stocks, cassava is currently in surplus and very cheap compared to rice on the local markets. Some cities including Monrovia, Robertsport, Buchanan, and Cestos and Greenville, where cassava prices are relatively higher, are receiving supplies from the zone, however, revenues remain low as rising transportation and fuel costs are decreasing incentives for shipping. Transportation, fuel and other non-food materials (boat, net, hook and trap line), as well as retail prices of palm oil and imported rice have gone up sharply due to depreciation of the L\$. Poor households, who buy rice and palm oil in small quantity units where prices are even higher, are spending much more money compared to average years. To cope, some households in the zone are atypically substituting cassava for rice consumption during the post-harvests period. Poorer households are also reporting saving recently harvested rice, estimated to be below last year's levels, by eating cassava and less preferred foods in order to stretch their own rice stocks up to the lean season from June to September. Farmers report that the "lizard has laid its tail on the harvest", implying that rice stockpiles are currently untouchable in the January/February period in order to last through the season.

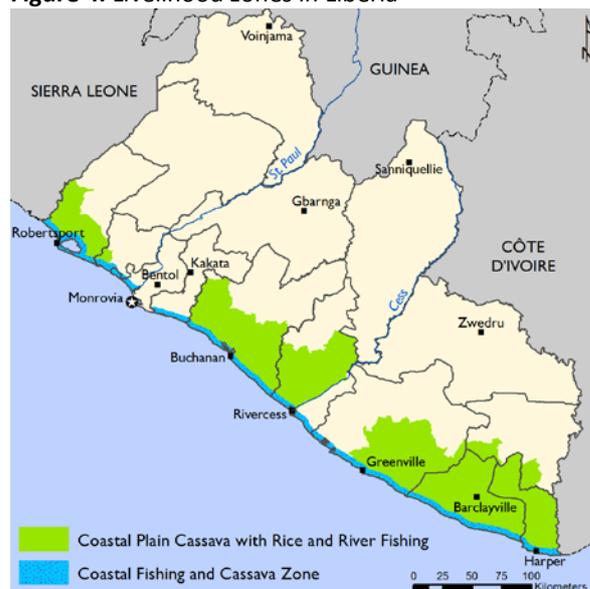
Assumptions

Cassava prices: Cassava production levels will remain in surplus and prices will be cheaper in January until March. Rice and cassava planting between April and June will slow down harvests and markets supplies will decline normally during the heavy rains between July to September. These factors along with depreciation are expected to increase prices to slightly above-average seasonal prices during the lean season.

Charcoal prices: Supply and prices of charcoal will remain at normal seasonal levels up to June. Between July and September, low seasonal stock levels combined with rising fuel prices and high transportation will likely increase prices at to slightly above-average levels.

Fish prices: Local fishers and traders expect normal seasonal supply of fish and reduced prices during active fishing between February and June. The lean season (July and September) will later decrease supplies and prices at seasonally average levels.

Figure 4. Livelihood zones in Liberia



Source: FEWS NET

Availability of local vegetables: Off-season harvests in March and April will supply sufficient local vegetables, especially greens, cabbage, okra pepper and bitter balls. Vegetable will be available at seasonal average levels until May. Between June and September heavy rains, availability of vegetable will be at average, seasonally low levels.

Most Likely Scenario

With the depreciation, rising commodity prices and decreasing financial access to imported foods and non-food items, poor household (making up less than 20 percent of the total population in this zone¹) will face difficulty meeting basic household needs, especially non-food requirements, and are expected to be Stressed (IPC Phase 2) acute food insecurity through half of the scenario period (June to September).

EVENTS THAT MIGHT CHANGE THE OUTLOOK

Table 1: Possible events over the next six months that could change the most-likely scenario.

Area	Event	Impact on food security outcomes
National	Election violence and instability	<ul style="list-style-type: none"> • Disruption of businesses, schools and work • Withdrawal of investment from the country and worsening macroeconomic situation • Increased insecurity disrupting livelihood activities
Lofa, Nimba, and Bong Counties	Above-average levels of grasshoppers between April and May	<ul style="list-style-type: none"> • Destruction of crops and reduced food availability
Lofa, Nimba, Bong, Margibi, Bomi, Cape Mount, and Montserrado Counties	Strong winds or storms between May and July	<ul style="list-style-type: none"> • Damage to houses result in population displacements and increased needs for shelter and food assistance • Crop and livestock damage limit food access and consumption levels
Margibi, Bomi, Cape Mount, and Montserrado Counties and the Southeastern Region	Floods/Atypically heavy rainfall between June to September	<ul style="list-style-type: none"> • Damage to houses result in population displacements and increased needs for shelter and food assistance • Crop and livestock damage limit food access and consumption levels • Water sources could be contaminated, resulting in an increased prevalence of diseases and global acute malnutrition in affected areas • Poor road conditions contribute to atypically high imported rice prices. Reduced food consumption levels and substitutions towards less preferred foods

ABOUT SCENARIO DEVELOPMENT

To project food security outcomes over a six-month period, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes those assumptions in the context of current conditions and local livelihoods to develop scenarios estimating food security outcomes. Typically, FEWS NET reports the most likely scenario. To learn more about this approach to scenario development, visit www.fews.net/scenario_development.

¹ According to [the Integrated Food Security Phase Classification \(IPC\) 2.0](#), an IPC area classification should be “based on whether or not at least 20 percent of the population is in a particular Phase or worse.”