

GUINEA Production and Market Flow Map Report

April 2013

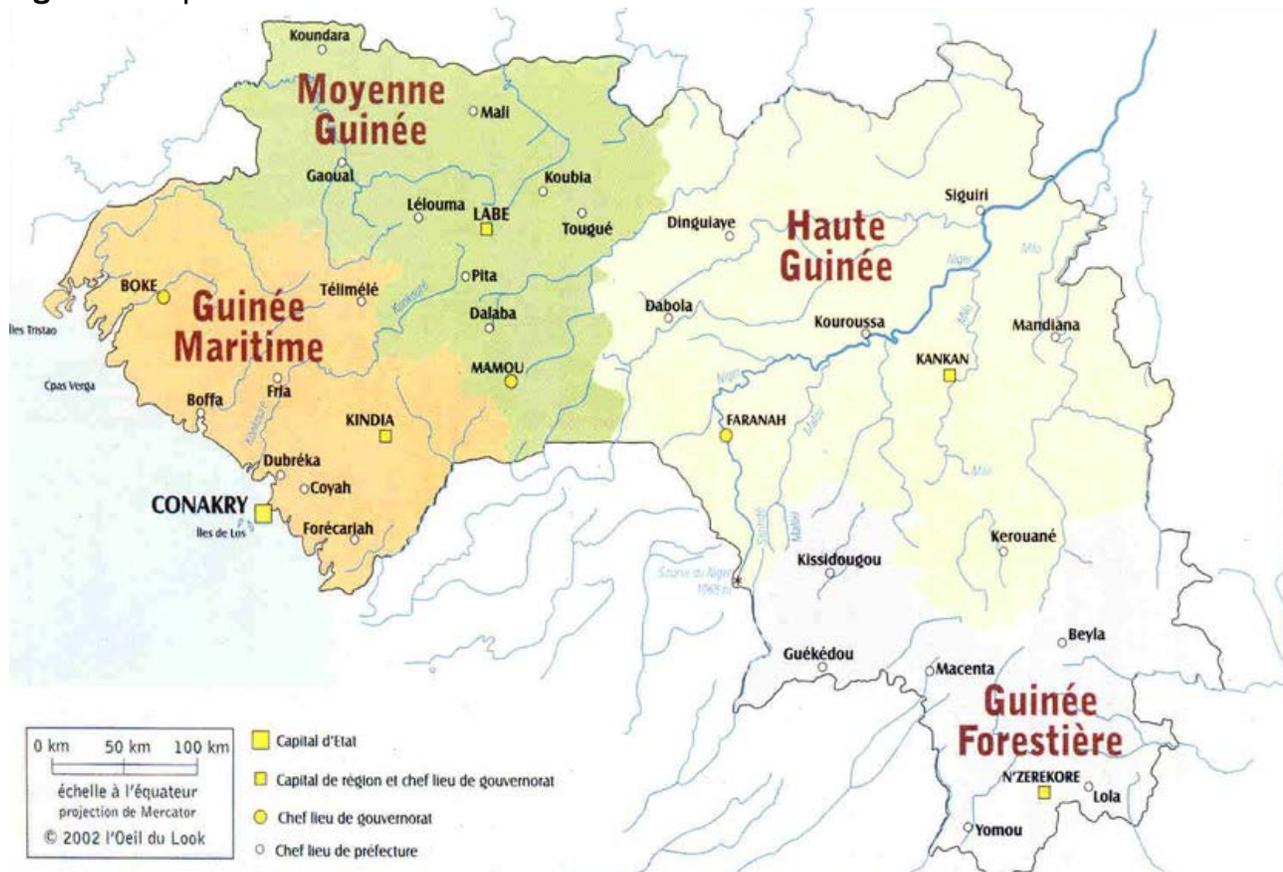
As part of its remote monitoring activities, FEWS NET organized in Conakry, Guinea, in February 2013 a workshop to map staple food commodity markets and trade flows in Guinea. FEWS NET, in consultation with its Guinean partners, selected five staple food crops to map: Fonio, maize, rice, cassava and groundnut.

Maize, rice and cassava are the three most important food crops in Guinea, rice being the predominant food in the diet of both urban and rural households. The participants to the workshop widely agreed that these five crops are cultivated throughout most of the Guinean territory and constitute major sources of calories for most of the population.

Millet, which is a crop relatively close to fonio, is not a major staple food in Guinea; it is mainly grown as a cash crop that is exported to Mali. Fonio is also exported to Mali (and to other countries), but fonio consumption is significantly more important than millet consumption. Irish potatoes and yams also are significant sources of calories but not everywhere in Guinea and not to the same extent as the five crops selected.

This document reports general and crop-specific features of markets and trade flows for these five crops that were discussed among the workshop participants, including some aspects regarding typical and bad years, market structure and conduct, and medium- to long-term market developments.

Figure I. Map of Guinea



Source: [L'Oeil du Look](#)

GENERAL OBSERVATIONS

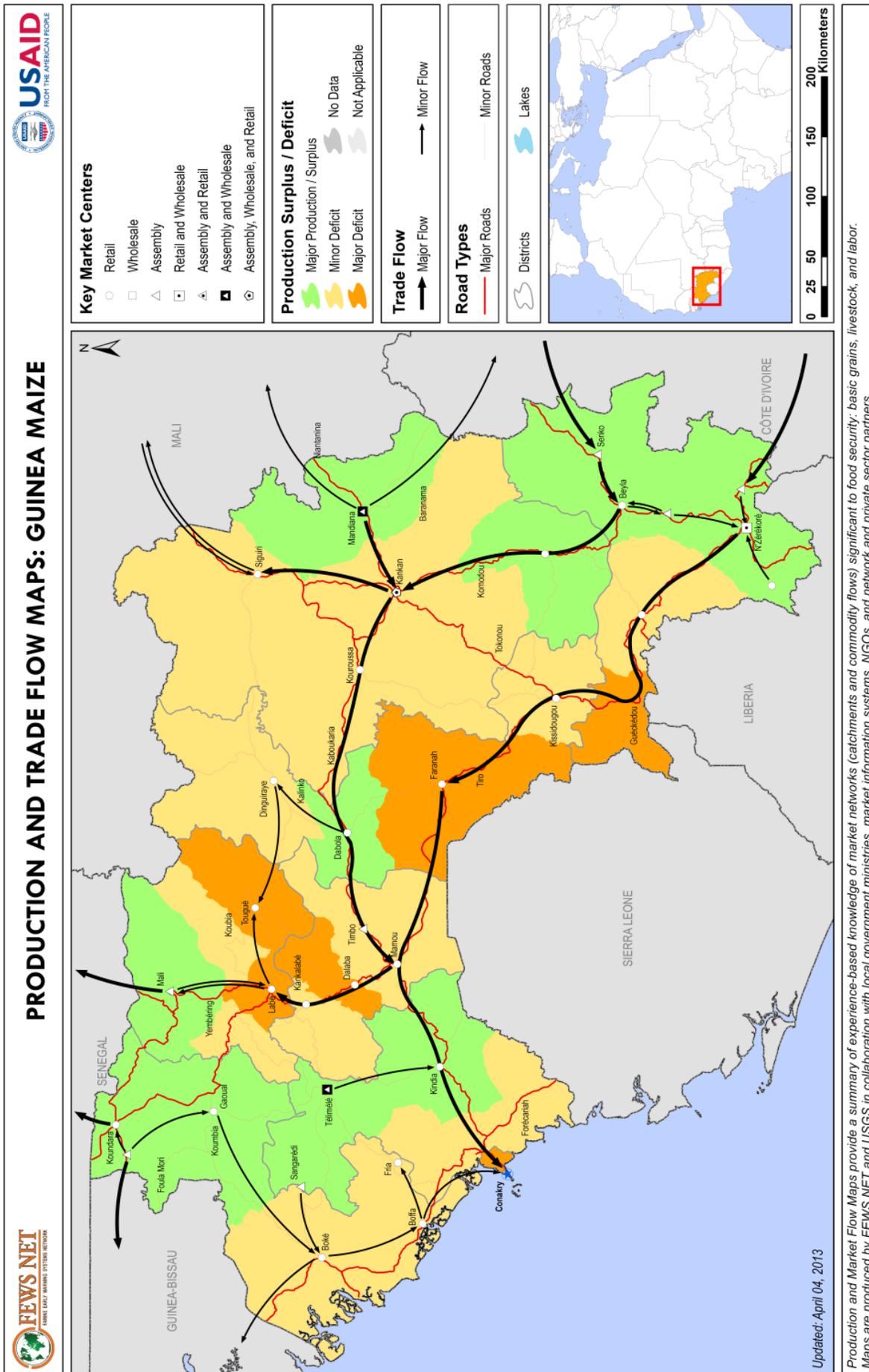
- Private markets in Guinea developed relatively late in the 1990s after an extended period of post-colonial, state-controlled agricultural marketing. The political instability and economic uncertainty that plagued the country in the 2000s also hindered public and private investments in agricultural markets.
- In Guinea, transport infrastructure, particularly roads, are in poor condition and underdeveloped; the provision of transportation services is insufficient; and the other types of infrastructure supporting agricultural markets (e.g., for storage and processing) are also underdeveloped. As a result, local food products may be less competitive on markets compared to imported products, further slowing the development of local value chains.
- Supply chains for local food products are primarily “small-scale”, involving smallholder producers who do not have significant storage capacity, and small-scale traders, particularly women, with a relatively small capacity compared to supply chains in the eastern trade basin of West Africa (Nigeria, Benin, Niger, Chad).
- The main market participants intervening at different stages of the supply chain are:
 - Rural collectors buying crops from producers
 - Urban collectors bringing crops to small urban centers
 - Wholesale traders buying large volumes in villages and small urban centers and supplying wholesale markets in large urban centers
 - Retailers
- In Guinea, the roles of assembly markets and wholesale markets in and around producing areas are somewhat intertwined
- Conakry, the capital city, hosts nearly half of the urban population in Guinea. It constitutes the largest consumption market. In fact, there are several major wholesale and retail markets in Conakry, the largest one being Madina, but also including ENTA, and Koloma. Coya and Dubréka are located at the main junction just outside of Conakry and serve various functions along the wholesale-retail chain.
- Other large urban centers/consumption markets are Kankan, Labé, and N'Zérékoré. Kankan, the second-largest city in Guinea, is an important “hub” market in the commercial network of almost every food commodity.
- There are large cross-border trade flows of food commodities between Guinea and Guinea Bissau, Senegal, Mali, Liberia and Sierra Leone. These trade flows are largely informal given a lack of clarity on export policy for food commodities. The weakness of the Guinean Franc (GNF) also contributes to an outflow of food commodities to neighboring countries.
- Trade flows between Guinea and neighboring countries (Sierra Leone and Côte d'Ivoire in particular) appear to play a crucial role in ensuring a steady supply of food products during the lean season in Guinea and providing a market to Guinean producers and traders after the harvest season in Guinea
- Guinea receives large quantities of rainfall, particularly in the southeastern part of the country, which is a food basket for the country; droughts are not frequent and when they occur, the diversity of agro-climatic conditions within Guinea and at the level of the western trade basin generally ensures that crop losses in affected areas are compensated for through flows from other producing areas

FONIO

- Fonio generally is a major staple food for Guinean households although in southeastern Guinea (*Guinée Forestière*) it is neither produced nor consumed in as large quantities as in the rest of the country
- Major fonio surplus areas are in *Moyenne Guinée* and *Haute Guinée*; major deficit zones are in southeastern Guinea and in and around Conakry
- Major internal trade flows go from Kankan to northeastern and southeastern Guinea; from Labé to Mamou and then to Conakry; from Labé to the north of *Moyenne Guinée*; and from Dabola to Mamou and then to Conakry
- There are major cross-border trade flows from Guinea to Mali and Senegal; smaller quantities are exported to Guinea-Bissau and Côte d'Ivoire

MAIZE

- Maize is a major staple food for Guinean households and is grown by many farm households
- The major producing areas are in coastal Guinea (*Guinée Maritime* or *Basse Guinée*), *Moyenne Guinée* and southeastern Guinea
- The major maize surpluses are in the eastern part of *Guinée Forestière*, a part of *Haute Guinée* bordering Mali, and the north of *Moyenne Guinée*; the surpluses in coastal Guinea are more modest owing to the fact that local production is smaller and population denser
- Major internal trade flows go from the surplus markets in the southeast westwards (Nzérékoré-Kissidougou-Mamou-Conakry, Nzérékoré-Kissidougou-Mamou-Labé, Kankan-Mamou-Conakry, and Kankan-Mamou-Labé) and northwards (Lola-Beyla-Kankan-Siguiri); there is a major flow from Mandiana prefecture in *Haute Guinée* feeding into the Kankan-Mamou and Kankan-Siguiri trade routes; flows from the surplus areas of coastal Guinea are minor as these surpluses are more limited (see explanation above)
- There are major maize trade flows between Guinea and neighboring countries; during the lean season and the early harvest period, large quantities of maize flow into Guinea from Côte d'Ivoire via the markets of Lola and Beyla (between August and October according to the workshop participants); after the maize harvest in Guinea (between November and February), maize flows into Côte d'Ivoire and also into Mali (Kankan-Bamako trade route); throughout the year, maize is exported to Guinea-Bissau, through Boké and Saréboïdo, and to Senegal, through Koundara and Mali (in Mali prefecture).
- Kankan and Beyla are two key markets in the maize domestic and cross-border trading systems; Beyla is a key market receiving trade flows coming from Côte d'Ivoire and the surplus of producers in *Guinée Forestière* region; Kankan is the largest wholesale market in the country for maize, where stocks are accumulated after the harvest period; large traders supplying the Conakry market source maize from the Kankan market and Ivorian and Malian traders come sell their supplies there

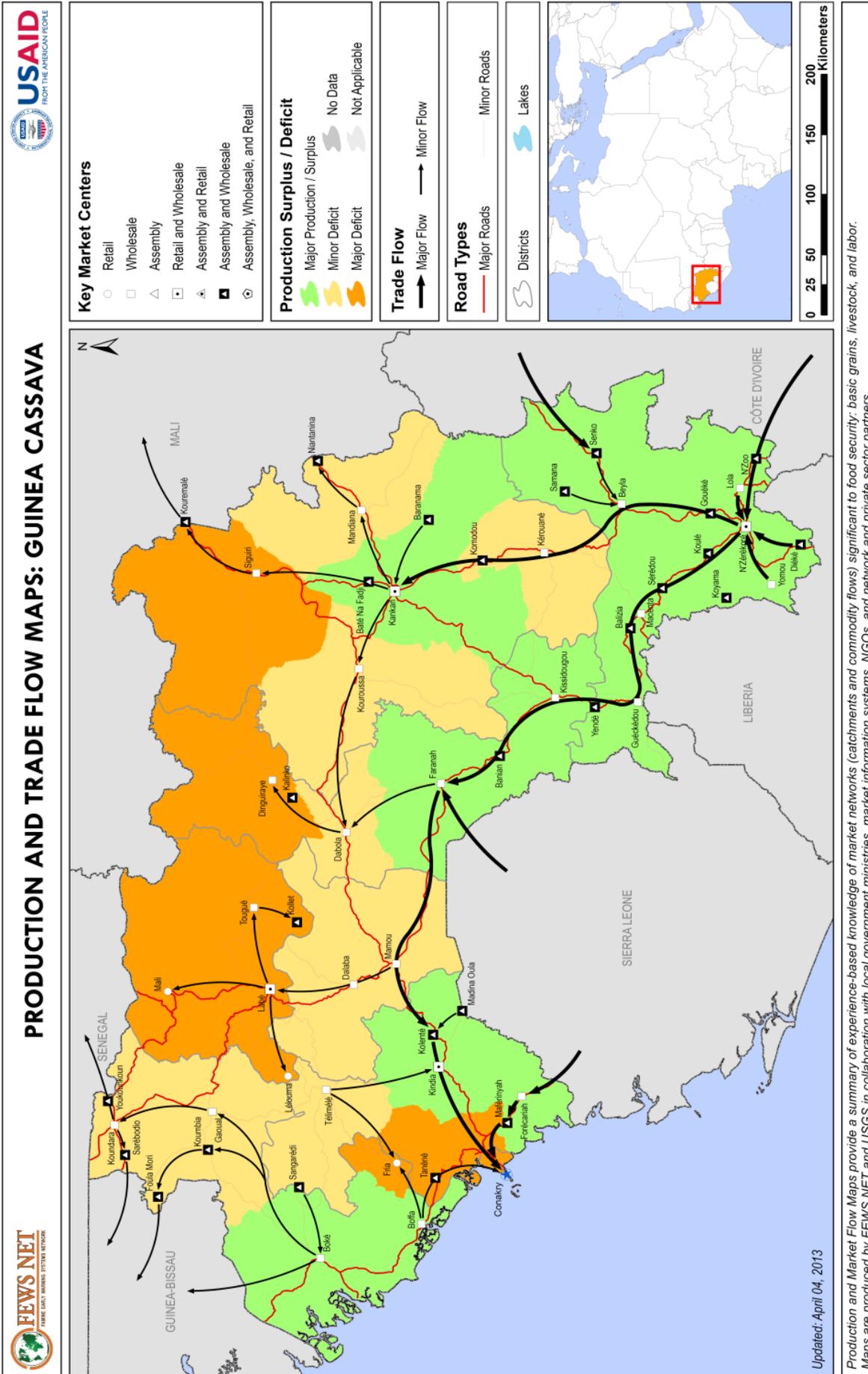


RICE (local)

- Rice generally is the main staple food of Guinean households and is grown by most farm households
- The major producing areas are in *Guinée Maritime* and *Guinée Forestière*
- Guinean households generally prefer parboiled local rice and imported white rice over local white rice and imported parboiled rice but in southeastern Guinea households show a greater preference for local white rice
- The major rice surpluses are in southeastern Guinea and coastal Guinea; the major deficits are in *Moyenne Guinée* and *Haute Guinée*
- Major internal trade flows go from the southeast to the northeast (Beyla-Kankan-Siguiré) and from the southeast to the west (Nzérékoré-Kissidougou-Mamou-Conakry, Nzérékoré-Kissidougou-Mamou-Labé, Kankan-Mamou-Conakry, and Kankan-Mamou-Labé); there are also major flows from the producing areas of coastal Guinea to the deficit areas of *Moyenne Guinée* (Boffa-Conakry, Forécariah-Conakry, and Koundara-Labé)
- There are major rice trade flows between Guinea and its neighbors; during the lean season, rice flows into Guinea from Sierra Leone, Côte d'Ivoire and Mali (between July and August according to the workshop participants); after the rice harvests in Guinea, rice flows back into those countries, but in smaller quantities; additionally, throughout the year, rice is exported to Guinea-Bissau, through Boké and Saréboïdo, and to Senegal, through Koundara
- High marketing costs hinder the marketing of local rice in the domestic market
- As local parboiled rice is often more expensive than imported rice, poor urban consumers generally consume more of the latter
- The importation of rice is subsidized (import duties reduction or exemption); the Government exerts pressure on private importers and distributors to maintain prices at relatively low levels; in several instances, the Government has freely distributed rice in the major urban centers
- Rice is reportedly informally re-exported to neighboring countries as its price is often lower in Guinea than in neighboring countries
- The rice importation sector is very concentrated (more or less three-fourth of the market is in the hands of four importers)
- In the future rice production is expected to grow faster in coastal Guinea as there is still unexploited potential in this part of the country

CASSAVA

- Cassava generally is a major staple food for Guinean households
- The major producing areas are in coastal Guinea, southeastern Guinea, and *Haute Guinée*
- The major cassava surpluses are in *Guinée Maritime*, *Guinée Forestière*, and *Haute Guinée*; the major deficits are in the north of *Moyenne Guinée* and *Haute Guinée* and in and around Conakry
- Major internal trade flows go from the southeast to the northeast (Beyla-Kankan) and from the southeast to the west (Nzérékoré-Kissidougou-Mamou-Conakry and Nzérékoré-Kissidougou-Mamou-Labé); minor flows supply the northern part of the country (Boké-Gaoual, Mamou-Labé, Faranah-Dinguiraye, and Kankan-Siguiri)
- Dinguiraye is an important market for cassava; as the harvest goes, traders bring large quantities of cassava supplies to Dinguiraye, where cassava tubers are processed into cassava flour and gari; then, during the lean season and Ramadan, processed cassava flows to the major urban markets of Guinea (Conakry, Kankan, etc.) as well as Mali
- Exports of cassava to neighboring countries (Guinea-Bissau, Senegal, and Mali) are usually minor
- Large quantities of cassava are imported from Sierra Leone and Côte d'Ivoire

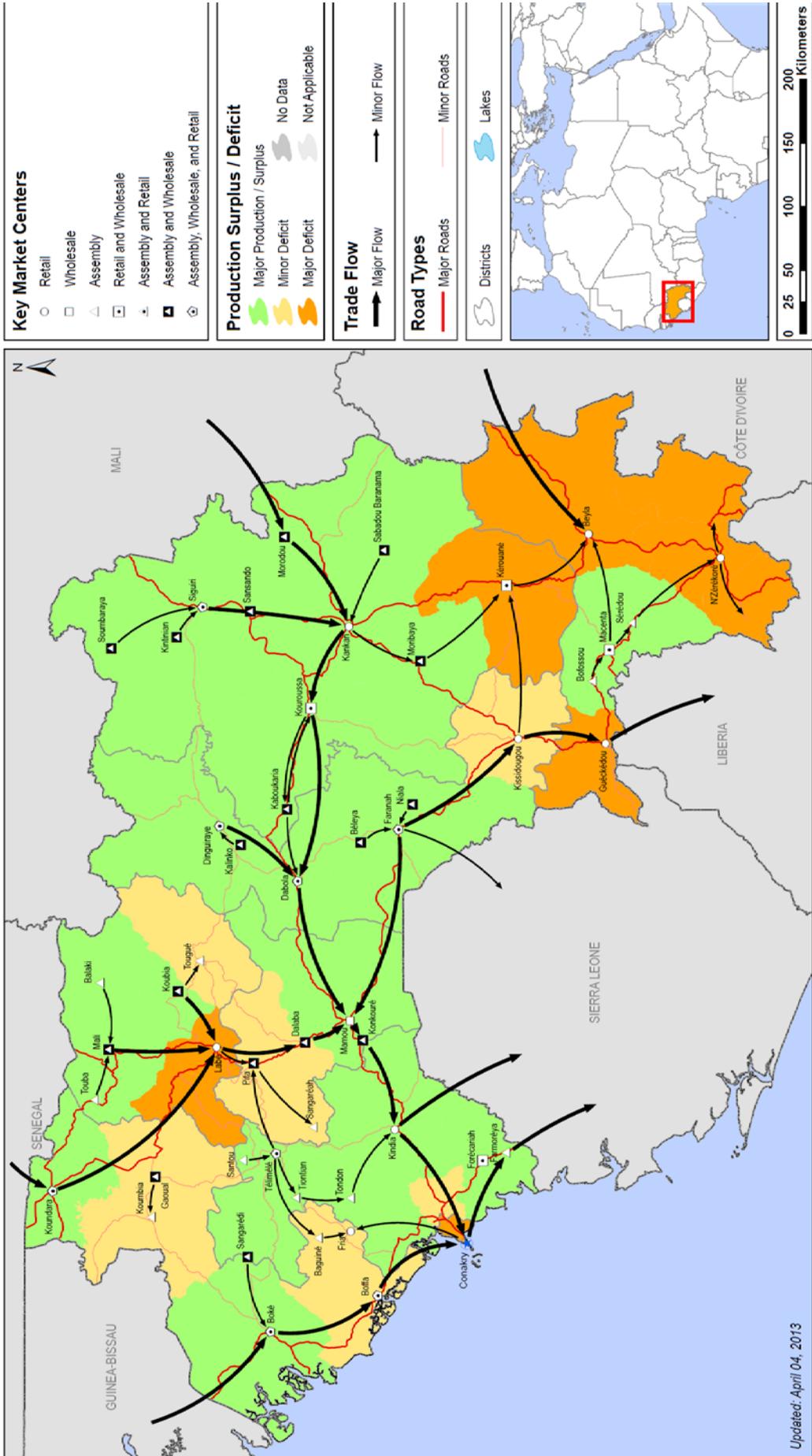


GROUNDNUT

- Groundnut is the main leguminous food crop in Guinea and a major staple food for Guinean households
- Groundnut is grown throughout most of the country and there are major producing areas in all geographic regions (*Guinée Maritime, Moyenne Guinée, Haute Guinée* and *Guinée Forestière*)
- There are some major deficit areas in the north of *Moyenne Guinée*, in and around the city of Labé, and in *Guinée Forestière*
- Internal trade flows for groundnut are more localized than for cereals as groundnut production is more widespread; there is a major flow going westwards, from *Haute Guinée* to coastal Guinea, supplying the capital city market; there are also major flows supplying the urban center of Labé; minor flows bring groundnut supplies to the deficit markets of southeastern Guinea
- Major cross-border trade flows are embedded in the regional trading system of the western trade basin, where groundnut supplies flow from the major surplus areas of Senegal and Mali, through Guinea, to the major deficit areas of Sierra Leone and Liberia and overseas export markets



PRODUCTION AND TRADE FLOW MAPS: GUINEA GROUNDNUT



Updated: April 04, 2013

Production and Market Flow Maps provide a summary of experience-based knowledge of market networks (catchments and commodity flows) significant to food security: basic grains, livestock, and labor. Maps are produced by FEWS NET and USGS in collaboration with local government ministries, market information systems, NGOs, and network and private sector partners.

MINING LABOR

- Though diversification towards agricultural exports is projected in the medium to long term, the mining industry currently represents approximately 40% of export revenue for Guinea
- In addition to formal, industrial mining of bauxite (Kamsa, Sangaredi, Debele), gold (Korom, Lero, Kiniero), diamonds (Banankoro), and iron (Nzo, Kalia, Beyla, Konta), small-scale, informal mining of gold and diamonds is very important in some areas; the recent importation of metal detectors in 2010 – 2011 has significantly increased artisanal mining activities
- Labor demand of importance to poor households in Guinea is primarily a result of direct demand (opportunities) in artisanal activities, primarily in Siguiri, Mandiana, Dinguiraye, Kouroussa, Kerouané, and Macenta prefectures
- Exploitation of mines may occur to a limited extent year-round for local laborers; the vast majority of artisanal mining, however, is seasonal, from October to May for several reasons: First, the government has been sanctioning mining activities during the agricultural season to promote agricultural labor, but this measure is difficult to enforce; more importantly, between June and September, rainfall fills excavation holes, making mining extremely difficult; finally, vegetation is thickest between June and September, making the use of metal detectors more difficult
- Industrial mines require primarily skilled labor; however, the indirect demand for unskilled labor due to the concentration of population and purchasing power of the skilled laborers of the mines does create poles of demand for local unskilled labor