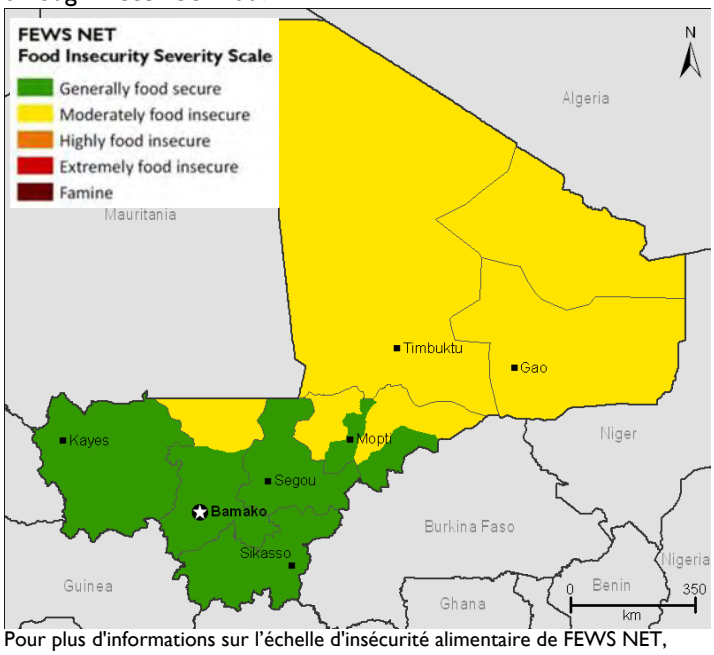
MALI Food Security Outlook

October 2009 through March 2010

- Lags in new plant growth in Bourem, Ansongo, Ménaka, and Gourma Rharous due to long periods of drought prolonged the hunger season for pastoralists, which normally ends sometime in June/July, until well into August, causing unusually large losses of livestock. The current food security situation for pastoralists in the Gao region is still unstable, but has visibly improved with the normalization of rainfall conditions since the middle of August, the provision of animal feed aid for local pastoralists, the social grain marketing program mounted by the OPAM (the National Produce Board), and the strengthening of community grain banks. Food security levels are improving in southern crop-growing areas with harvests of early groundnut and corn crops, encouraging traders and farmers to unload their old grain inventories.

Figure 1. Current food security assessment for October through December 2009



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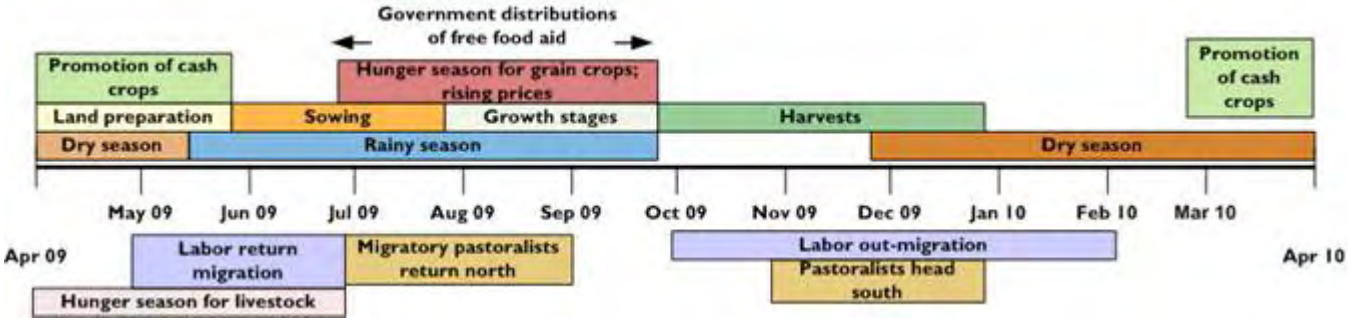
Source: *FEWS NET*

- The food security outlook for October 2009 through March 2010 is based on the assumption of an average to good harvest. Food availability should improve, particularly between October and December of this year once the harvest is brought in, bolstering the income of farm families and strengthening household grain availability and access. Conditions for livestock (grazing and watering conditions) should be satisfactory until the beginning of the next hunger season for animals in March/April of next year, except in parts of Gao and Timbuktu, where the condition of pasture will start to deteriorate by January. After several consecutive years of good harvests, for the most part, the nationwide food security situation between October of this year and March of 2010 should be fair to good.

Seasonal calendar and critical events timeline



Source: *FEWS NET*

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Current food security conditions

In general, the food security situation across the country is satisfactory, even in northern pastoral areas where drought conditions prolonged the hunger season for pastoralists until well into August, causing unusually large losses of livestock and, as a result, destabilizing the food security situation in these areas. Even with the presence of fresh groundnut and corn crops on local markets, market grain supplies are normally low right after the hunger season.

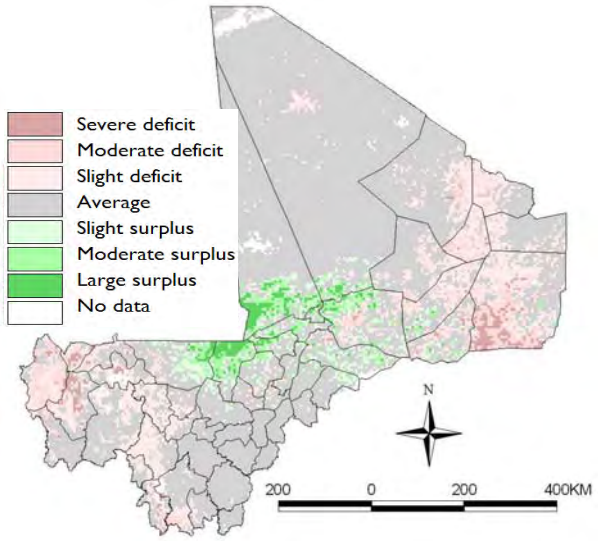
After getting off to a fairly late start early in the growing season in all parts of the country, the rains remained light through the end of July, with a poor spatial-temporal distribution of rainfall. There were fairly long periods of drought, particularly in areas above the 14th parallel, mainly in the Timbuktu, Gao, and Kidal regions and parts of Mopti. The visible improvement in rainfall conditions across the country beginning in the third dekad of August continued through the end of the third dekad of September, with fairly heavy rainfall causing scattered flooding in areas across the country, though without producing any major damage. This rainfall was relatively evenly distributed, though parts of the north are still reporting rainfall deficits. Cumulative rainfall totals for the period from May 1st through September 20th of this year range from average to above-average in all parts of the country. The correction in cumulative rainfall amounts allowed farmers to expand the area planted in crops during the growing season. As a result, the nationwide harvest forecast is still good, on par with the five-year average.

In general, millet and sorghum crops are in the early panicle formation-early heading stage, corn crops are in the heading-maturation and, in some cases, the harvesting stage, groundnut crops are in the pod formation and early maturation stage, bottomland and rainfed rice crops are in the height growth-early panicle formation-early heading stage, grain cowpea crops are in the flowering-seed setting-maturation stage, and cotton crops are in the flowering-capsule formation stage. On the whole, crop growth and development is going well and fields are in good condition. This bodes well for a good harvest and an improvement in household food security conditions, particularly if the rains last through the middle of October.

A look at plant health conditions shows populations of grain-eating birds in flood-recession rice-farming areas of the Timbuktu, Gao, and Mopti regions, where crops are in the heading-maturation stage. The limited supply of wild grasses in certain areas is still raising concerns. Efforts by farmers to keep watch over their fields and to lay netting around village-level irrigation schemes with assistance from the Plant Protection Service and village brigades continue. All parts of the country are reporting sightings of grasshoppers, beetles, and stem-boring caterpillars, but no major damage to crops. Defoliating caterpillars have also been sighted in rice seedbeds in Ségou (Macina, Niono). Crops in Diéma have already been treated. The desert locust situation is stable, but rainfall conditions are becoming increasingly conducive to breeding activities in gregarization areas.

A look at rainfall conditions during this year's rainy season in northeastern Mali (in the Gao region and the Gourma area of Timbuktu) shows large rainfall deficits in June/July, particularly in Bourem, Ansongo, and Ménaka. Lags in new plant growth due to these drought conditions prolonged the hunger season for pastoralists, which normally ends sometime in June/July, until well into August, causing unusually large losses of animals. Biomass production is still below-average for this time of year (Figure 2). The current food security situation for pastoralists in the Gao region is still unstable, but has visibly improved with the normalization of rainfall conditions since the middle of August, the provision of animal feed aid for local pastoralists, the social grain marketing program mounted by the OPAM (the National Produce Board), and the strengthening of community grain banks.

Figure 2. Normalized difference vegetation index (NDVI) as of September 30, 2009, compared with the short-term (2004-2008) average



Source: *USGS/FEWS NET*

Elsewhere, in the central and southern reaches of

the country, there are lush pastures and good animal watering conditions. Animals are in satisfactory physiological condition and milk production is reportedly good, which is benefiting pastoral households. Right now, animal herds are still ensconced in rainy season grazing areas.

Markets across the country are well-stocked with foodstuffs in general and grain crops in particular. However, the levels of market grain supplies are steadily dropping due to:

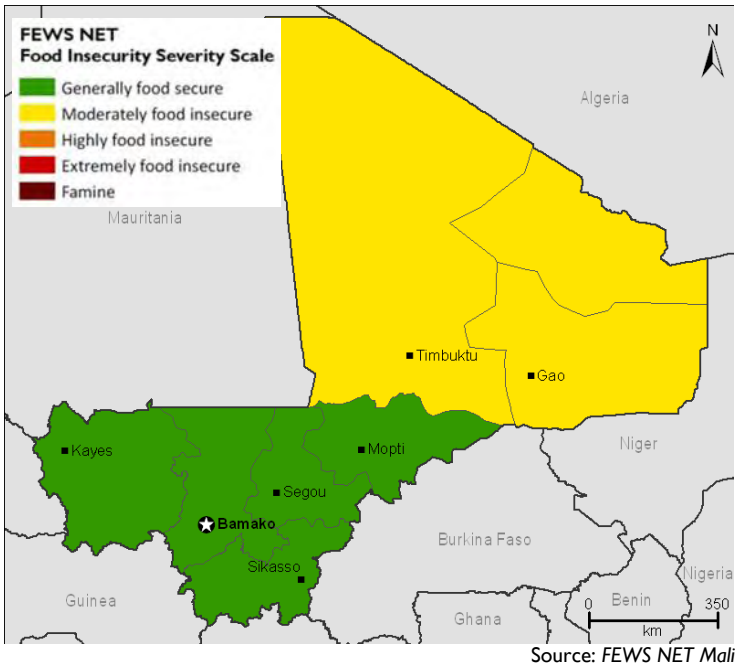
- reductions in commercial on-farm inventories;
- the guarded attitude on the part of farmers with respect to the final outcome of the growing season;
- the faltering demand for grain with the conclusion of the month-long celebration of Ramadan associated with a high demand for grain in general and for millet in particular.

Grain supplies are beginning to improve with the first shipments of fresh crops to market. In general, prices in late September were holding steady. However, there are reports of some small hikes in prices, which are only normal, particularly in millet prices on retail markets in the regional capitals of Sikasso and Gao, and in rice prices in Kayes and Bamako. Coarse grain prices are still outstripping the nominal five-year average, though lagging behind record nominal 2004/05 prices. Looking ahead, this upswing in prices should reverse itself once markets get in new supplies of fresh crops in October.

Most likely food security scenario (October 2009 – March 2010)

Though the rainy season got off to a slow start in farming areas across the country, the normalization of rainfall conditions since the middle of August bodes well for a good harvest. In general, season-long cumulative rainfall totals for the period from May 1st through September 20th of this year are average to above-average. The high rainfall over that period created good soil water reserves, which should help crops finish growing. There should be enough useful rainfall through the middle of October to ensure that crops reach full maturity, particularly coarse grain crops in farming areas across the country. However, according to the weather forecast through October 15th, the country's Sahelian zone is not expected to continue to get enough rainfall, making localized crop and pasture production deficits likely in this area.

Figure 3. Most likely food security scenario for October - December 2009



Source: *FEWS NET Mali*

With water levels actively rising on rivers and streams around the country, there should be an abundant supply of groundwater for the growing of off-season crops beginning in December of this year. A good off season would improve nationwide crop availability and strengthen household food security conditions, particularly in interested crop-producing areas around the country. Thus, the most likely food security scenario is based on the assumption of an average to good, though slightly later than usual, harvest, both at the nationwide level and in the country's various crop-producing areas. Such a harvest would help ensure good grain availability and a brighter household food situation for the country as a whole for the next few years.

As was the case last year, with no domestic policies banning grain exports, there should be a smooth flow of grain trade between Mali and its neighbors throughout the outlook period. However, trouble on major arteries could interfere with the free movement of commodities.

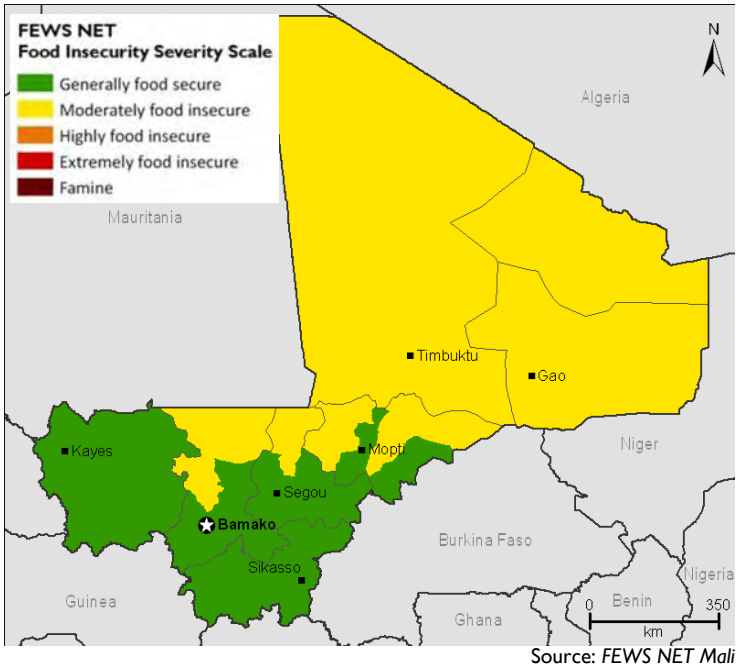
The cotton sector has been in a downward spiral for the past few years. Cotton growers are disillusioned with selling prices for their crops. Nevertheless, thanks to assistance with inputs and recovery efforts, this year's planting rates are up by approximately 35 percent from last year. However, the late start of this year's rainy season threatened cotton seedlings, prompting farmers to replace cotton with what they considered to be other more profitable crops (such as groundnuts, sesame, etc.) Production, as well as the availability of inputs and demand for labor, will show only a small improvement over last season, continuing to lag behind customary production levels prior to the year 2001 when these activities were well organized.

Traditional coping strategies (seasonal migration, off-season crop production, small-scale craft-making, etc.) should suffice to keep households relatively food secure between now and March of next year. The general climate should be conducive to promoting household food security. Customary migration by workers to urban areas and certain foreign countries will be slightly delayed by the need to finish harvesting late-planted crops.

As usual, food availability should gradually improve beginning in October, once the harvest is brought in, bolstering the income of crop-producing households. Market grain supplies will peak between October and December, driving down current high price levels. All markets should see a normal seasonal downswing in prices between October and December, further strengthening the purchasing power of consumer households in general and poor, market-dependent households in particular. However, price levels will remain above the five-year average, particularly if markets are faced with heavy demand to meet the simultaneous stock-building needs of grain banks, the OPAM, the WFP, village grain reserves, etc. The weeks between October and December are the time when markets have the largest supply of crops for sale, causing grain prices to fall. This is precisely why it is the best time of year for rebuilding all types of reserves. These large coinciding needs and the resulting high demand could cause prices to fall [stet] during this period. The pattern of average harvests in certain areas could speed up the seasonal upswing in prices beginning in February/March of next year.

Food availability will improve across the southern and central reaches of the country, in farming and agropastoral areas already enjoying several consecutive years of good grain harvests, ensuring the provisioning of high-demand areas of the country, with no foreseeable special problems. Good pastoral conditions (pasture production, the physiological condition of animals, animal production, market values) will further strengthen the food security situation in these areas, where local households should be generally food-secure between now and March of 2010.

Figure 4. Most likely food security scenario for January-March 2010



Source: *FEWS NET Mali*

There was very little precipitation in the third dekad of September in pastoral areas in the northeastern part of the country, and the rainfall outlook through mid-October is for little to no rainfall. The condition of livestock and the food security situation of pastoralists should temporarily improve over the next three to four months after the August/September rains. Rising water levels in the upper and middle Niger River basin should fill animal watering holes to their normal levels. Lags in pasture development due to delays in new plant growth and heavy pressure on pasturelands from prolonged grazing by large concentrations of animals could trigger a deterioration in pastoral conditions by as early as January of next year, instead of in February or March as is normally the case. This means that pastoralists may soon be forced to resort to the use of animal feed for their livestock or to begin their annual trek south before their animals have reached their normal weight. The poor physiological condition of animals in the Gourma area of Timbuktu and the eastern reaches of the Gao region will drive down prices for livestock during the hunger season for the animal population, cutting the incomes of this group of pastoralist households as of February of next year. Affected households are concentrated mainly in the districts of Gourma-

Rharous (Timbuktu), Ansongo, Bourem, and Ménaka (Gao). Security problems in northern Mali, the Tuareg rebellion in Niger, and possible clashes with local farmers will limit normal herd movements and household coping capacity in the face of these conditions as of January, particularly in the Ménaka area. However, with the current respite from civil security problems, these households will benefit from a generally good nationwide climate for the promotion of food security and, like households in northern pastoral areas, should be facing only moderate levels of food insecurity.

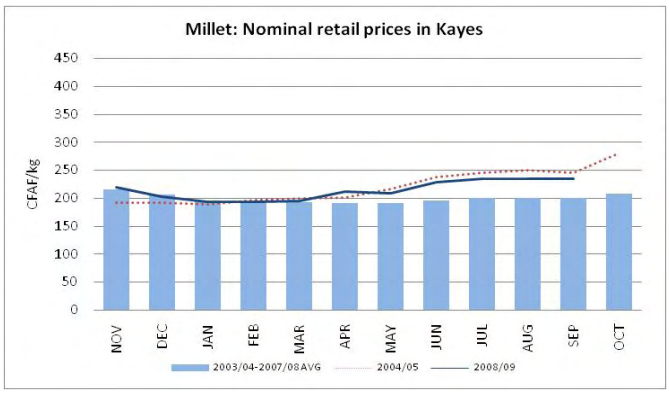
Table 1: Events liable to change the most likely scenario in the next six months

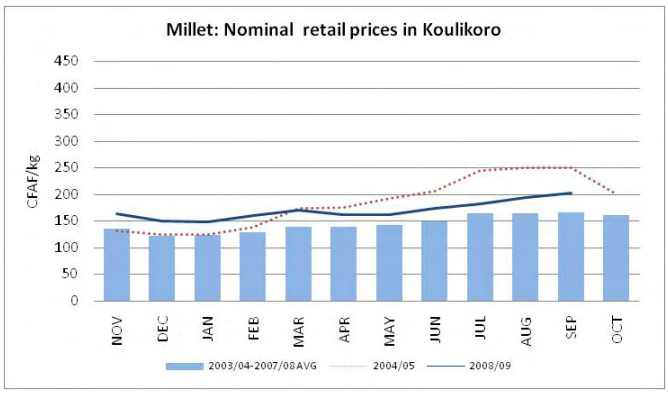
Geographic area	Potential events	Impact on food security conditions	Probability of material-ization*	Key variables to track
Farming and agropastoral areas (in the southern part of the country)	Steady rainfall into mid-October	Average harvests, general food security	Highly unlikely	Rainfall conditions and distribution of rainfall (WRSI, NDVI, RFE, anomalies)
	Possible infestations by crop predators (grain-eating birds)	Decline in crop production in farming areas across the country	Somewhat unlikely	Plant health conditions
Northeastern Kidal region	Security problems with armed Tuareg bandits and Islamists	Blocking of supply routes for local residents, possible evacuations to more secure areas (in southern Mali, Algeria, Mauritania, or Burkina Faso) interfering with their coping strategies and jeopardizing their food access	Somewhat unlikely	Local security conditions

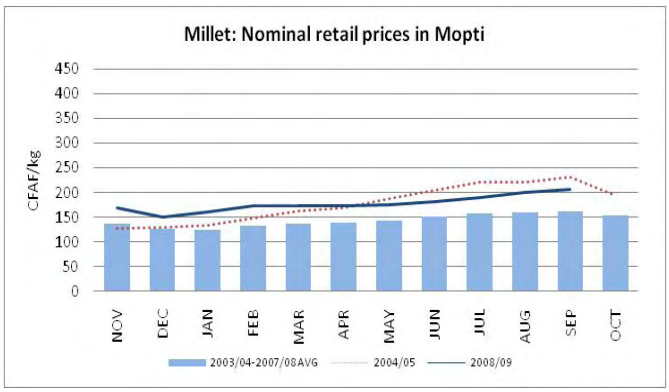
* Probability levels	Description
Somewhat unlikely	Could materialize during the projection period with a slight change in circumstances
Highly unlikely	Could materialize during the projection period only with a major change in circumstances

Monthly prices are supplied by FEWS NET enumerators, local government agencies, market information systems, UN agencies, NGOs, and other network and private sector partners.

Millet, rice, and sorghum constitute the basic staple foods for the majority of the Malian population. Millet has traditionally been the most widely consumed, but since 2005 rice has become a popular substitute in urban households. Sorghum is generally more important for rural than urban households. Markets included are indicative of local conditions within their respective regions. Ségou is one of the most important markets for both the country and region because it is located in a very large grain production area. Bamako, the capital and largest urban center in the country, functions as an assembly market. It receives cereals from Koulikoro, Ségou, and Sikasso for consumption and also acts as an assembly market for trade with the northern regions of the country (Kayes and Koulikoro) and Mauritania. Markets in the deficit areas of the country (Timbuktu and Gao) receive their supplies of millet and rice from Mopti, Ségou and Sikasso.






Millet: Nominal retail prices in Mopti
CFAF/kg
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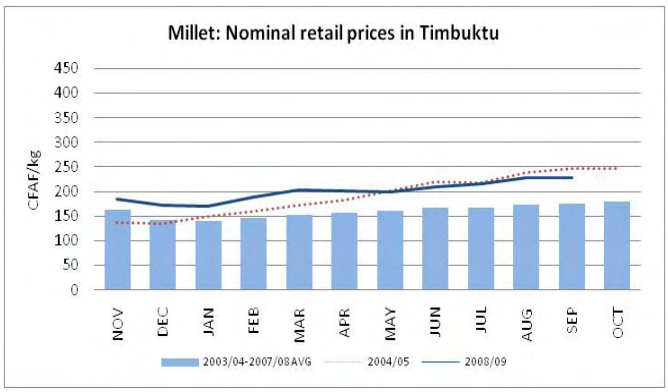
Millet: Nominal retail prices in Timbuktu
CFAF/kg
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Millet: Nominal retail prices in Gao
CFAF/kg
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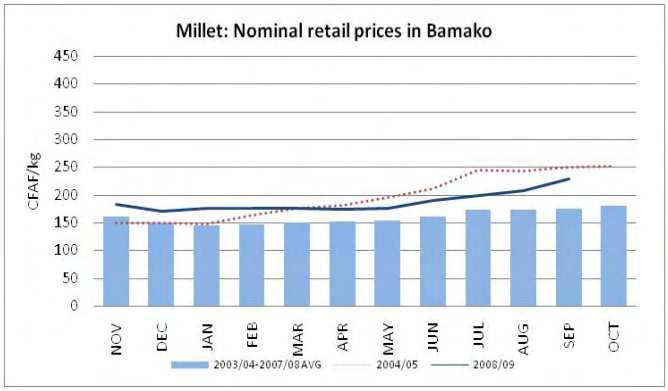
Millet: Nominal retail prices in Bamako
CFAF/kg
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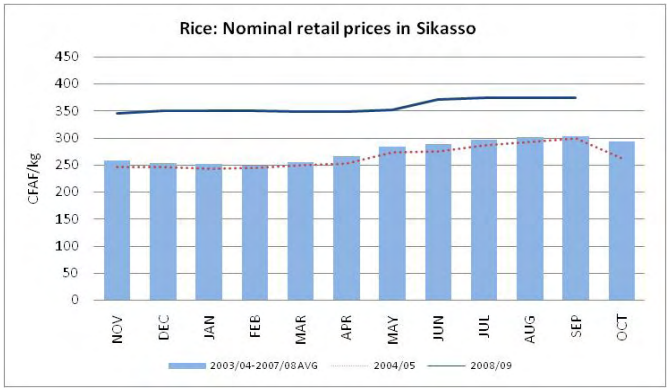
Rice: Nominal retail prices in Sikasso
CFAF/kg
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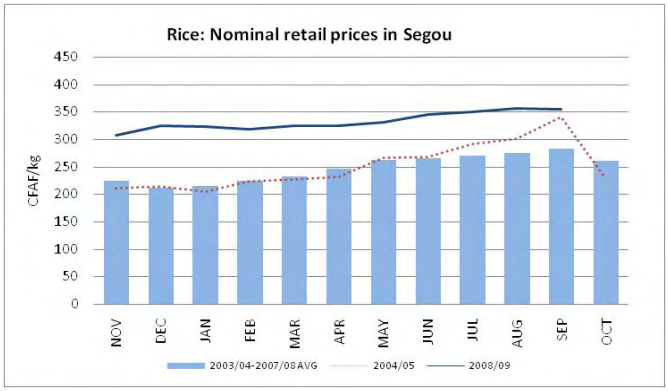
Rice: Nominal retail prices in Segou
CFAF/kg
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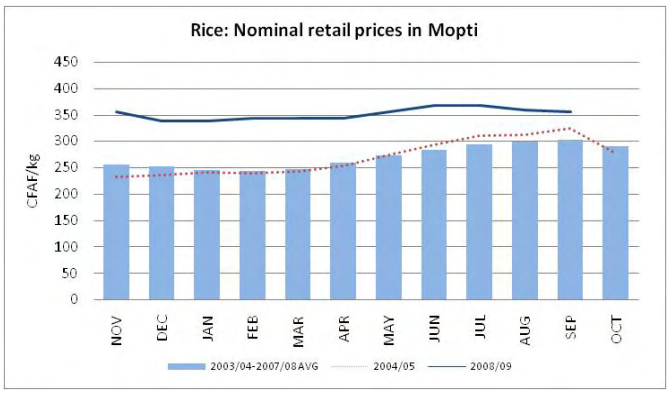
Rice: Nominal retail prices in Mopti
CFAF/kg
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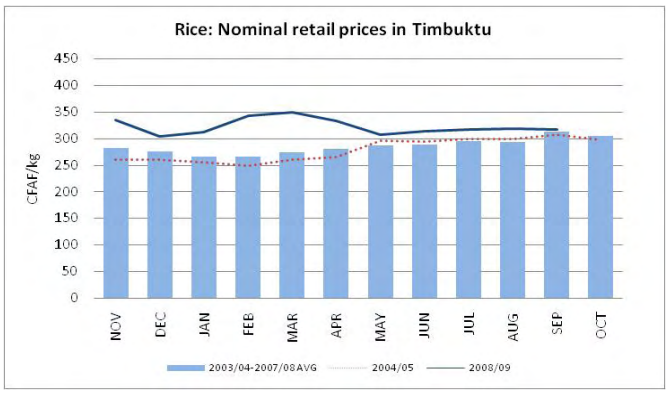
Rice: Nominal retail prices in Timbuktu
CFAF/kg
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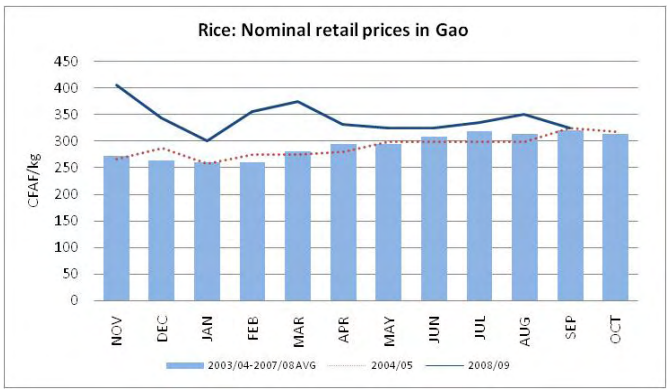
Rice: Nominal retail prices in Gao
CFAF/kg
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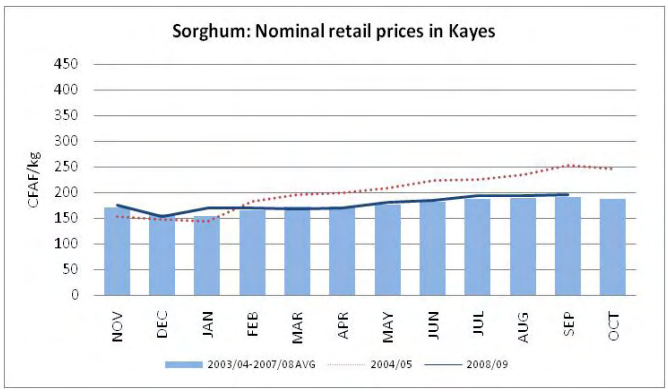
Sorghum: Nominal retail prices in Kayes
CFAF/kg
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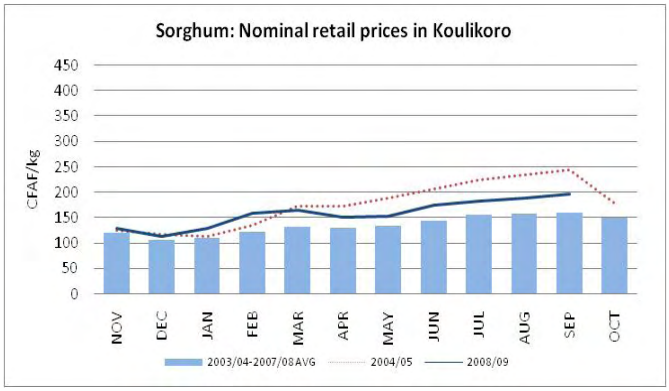
Sorghum: Nominal retail prices in Koulikoro
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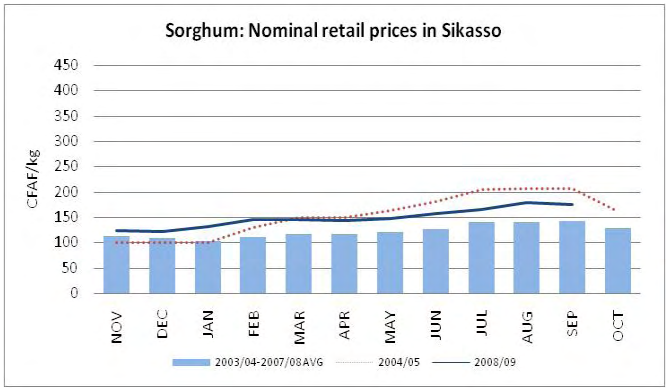
Sorghum: Nominal retail prices in Sikasso
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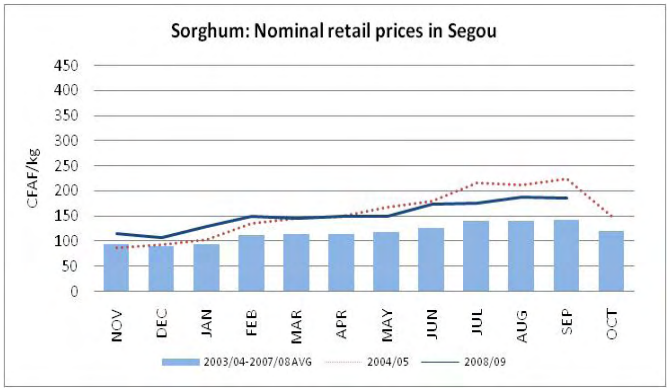
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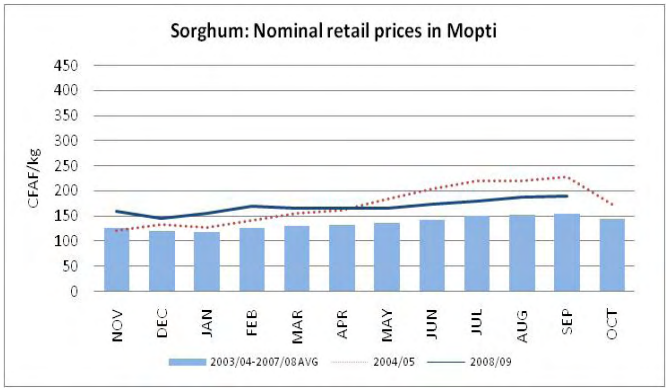
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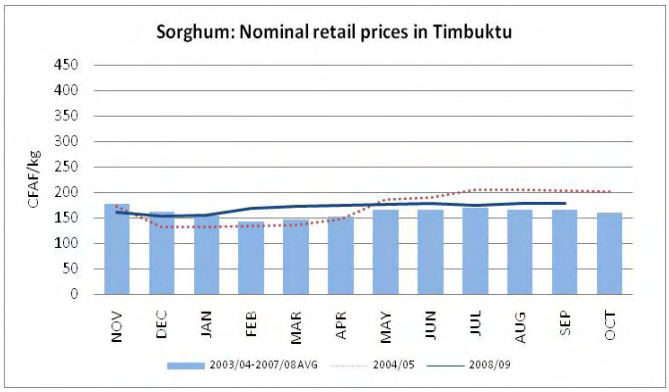
Sorghum: Nominal retail prices in Timbuktu
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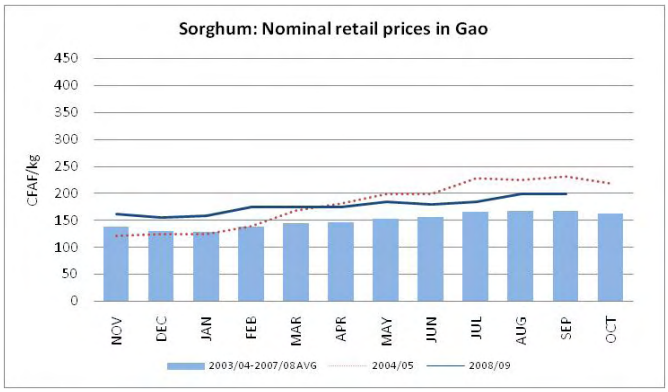
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