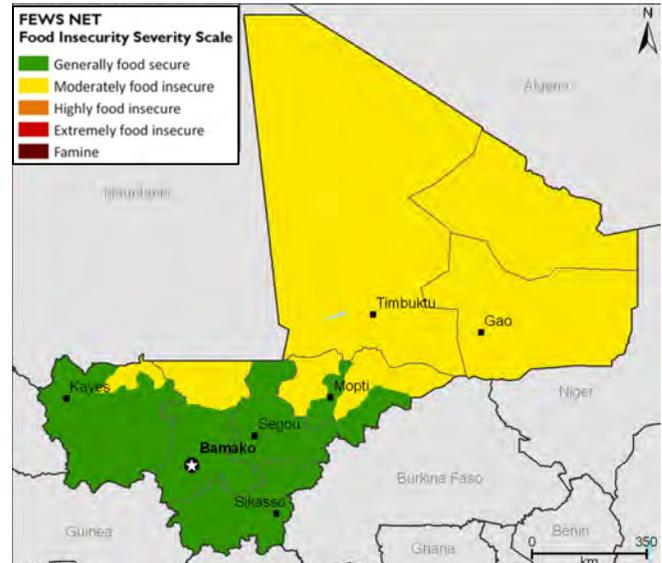


MALI Food Security Outlook

January through June 2010

- Harvests of rainfed crops continue in southern, central, and western farming and agro-pastoral areas. Flood-recession crops are making good progress. Harvests across the country are average to good, except in northeastern agro-pastoral and pastoral areas. The marketing season is already underway and food security conditions are currently stable.
- Pasture resources in northern livestock-raising areas are sparser than usual and harvests of rainfed crops by agro-pastoralists in these areas were mediocre, particularly in Ménaka and Ansongo. Thus, the hunger season in these areas, which generally runs from March to July, could begin as early as January or February of this year due to shortages of pasture and watering holes. Pastoralists in the northern reaches of the country will be facing higher than usual levels of food insecurity.
- The average to good levels of crop and pasture production in the central and southern reaches of the country should keep most households in these areas generally food-secure for the first half of this year.

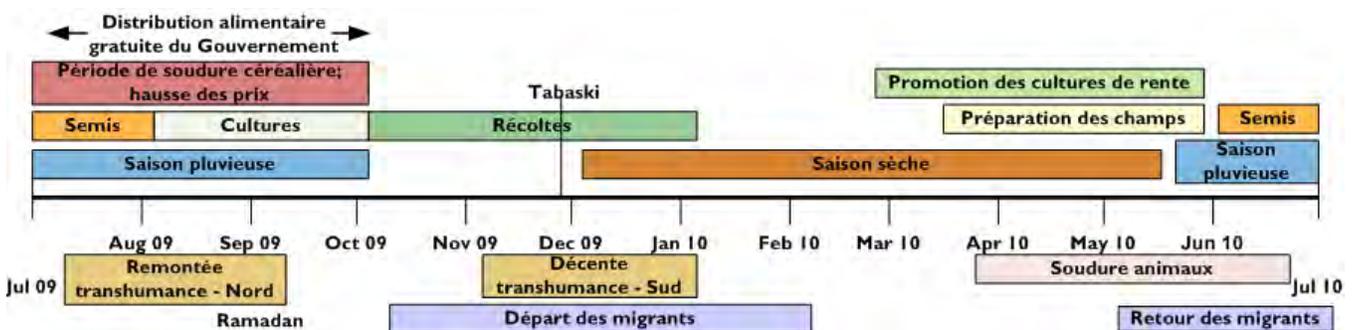
Figure 1. Map of current estimated food security conditions, November - December 2009



For more information about the FEWS NET Food Insecurity Severity scale, see: www.fews.net/FoodInsecurityScale

Source: FEWS NET

Seasonal calendar and timeline of critical events



Source: FEWS NET Mali

Current food security conditions

In general, good grain availability is steadily improving food security conditions. With the good progress of the growing season, aggregate crop production should top the five-year average. However, right now, the large shortfalls in crop and pasture production in northeastern agro-pastoral and pastoral areas are creating moderate levels of food insecurity in these areas (Figure 2).

FEWS NET Mali
Bamako
Tel: 223 20 29 94 60
mtogola@fews.net

FEWS NET Washington
1717 H St NW
Washington DC 20006
info@fews.net

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In response to concerns over the desert locust situation, the six canvassing teams deployed over the period between October 17th and November 15th of this past year scoured the area along the country's border with Mauritania, the western reaches of the Timbuktu region, and the Gourma area of Gao, sighting only a few solitary insects. Thus, the nationwide locust situation is still stable. Since the end of the rainy season, environmental conditions are no longer conducive to desert locust activity, except in bottomland areas and wadi beds in the Kidal region. There have been no canvassing activities in gregarization areas. This lack of canvassing in gregarization areas is a breach in the early warning system.

Southern and western farming and agro-pastoral areas

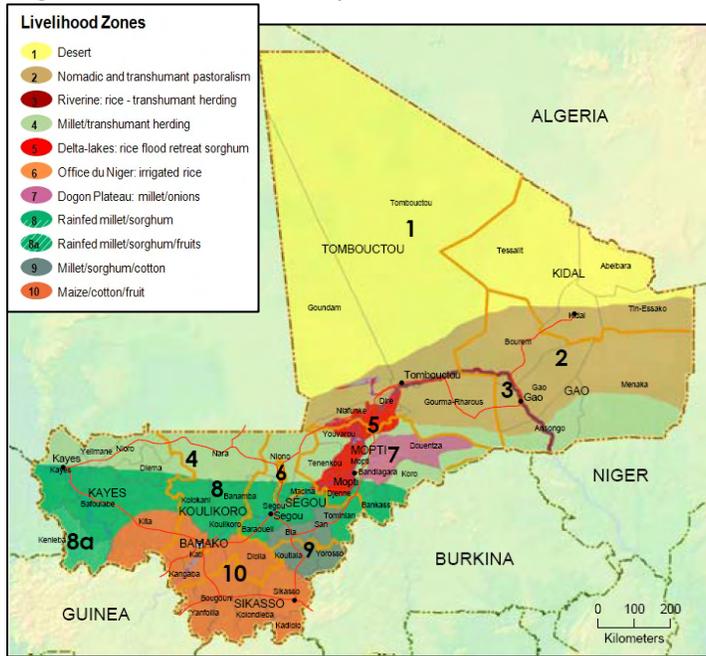
With the rains getting off to a slow start at the beginning of the winter growing season, many farmers were forced to replant their crops late in the season. However, late season rains lasting into October allowed these late-planted crops to reach full maturity and to be successfully harvested. Thus, this year's good rainfall conditions in major crop-producing areas, particularly since the middle of August, helped ensure good harvests of different types of crops.

Right now, farm families are busy harvesting their crops. Farming activities for off-season and flood-recession crops are already underway in lake areas of Mopti and Timbuktu. Locally heavy rainfall throughout September and into the middle of October has filled temporary lakes and ponds and flooded plain areas, which bodes well for this year's harvests of off-season crops, which are an important food source for food-short households looking to cover their grain deficit and diversify their diet.

This is the most stable time of year in these areas as harvesting activities by farm families pick up speed and crops are shipped to local markets. These areas also provision other high-demand areas of the country. Surplus grain crops are diverted from local markets and routed to the northern part of the country and neighboring countries such as Mauritania, Niger, and Senegal. Well-to-do farmers in primarily millet, sorghum, and corn-producing areas whose harvests exceed their annual grain needs ship their surplus crops to local markets. Poor households are forced to promptly sell off part of their meager harvests in order to generate enough income to meet other household needs. Crop performance for this past growing season is such that the good food availability for wealthy households is improving food access for the poor, who are also benefiting from job opportunities with these wealthy households. Thus, members of poor households are being hired by wealthy farmers to help harvest their crops and to help with the processing of harvested crops (in crop collection, threshing, winnowing, and shipping operations).

Farmers should have large food stores after the recent string of good growing seasons in most of these farming and agro-pastoral areas, particularly in the Sikasso, Ségou, Koulikoro, and southern Kayes regions. A look at current food security conditions shows regular shipments of crops to market as ongoing harvests steadily improve food supplies, the first signs of a normal seasonal downswing in prices, and a steady improvement in household grain access. In general, poor households unable to produce enough crops to meet their needs will resort to their usual coping strategies, hiring themselves out as paid laborers, particularly to wealthy households, in order to earn enough income to buy needed food supplies.

Figure 2. Livelihood zone map of Mali



Source: FEWS NET Mali

Markets are getting regular shipments of grain, and supplies are more than adequate. Prices on grain markets around the country are still moving downwards as the 2009/10 marketing season gets underway. This downward trend in prices is due mainly to ongoing harvests and deliveries of fresh crops. Grain prices across the board are above the five-year average.

In general, consumer prices for coarse grain crops are higher than at the same time last year as an after-effect of the heavy demand for these crops during the 2008/2009 marketing season. However, corn prices in Sikasso, the country's largest corn-producing area, are still lower than last year. Rice prices around the country are also lower than at the same time last year due to the combined effects of carry-over supplies of subsidized commercial imports from the 2008/09 season and fresh crops from the 2009/10 season.

As usual, the period from October through December is devoted to the rebuilding of family food stores, community and institutional food reserves, and grain bank inventories. However, procurements for the rebuilding of these food reserves have not yet really gotten started, compared with the pace of harvesting activities. The replenishment of these reserves should help strengthen future response programs in localized pockets of food insecurity.

Market garden produce, cash crops (watermelons, other melons, etc.), off-season crops, income-generating activities, and out-migration should help bring in income to meet household needs. As usual, certain areas such as the Kayes region are seeing an influx of migrant remittances in cash and in kind.

While the celebration of Tabaski is over, the year-end holiday season (Christmas and New Years) should stabilize demand for small animals and poultry nationwide and, in particular, in large cities, giving farmers an opportunity to sell products other than grain crops on the market (small animals and poultry) and, thus, stagger the marketing of their crops over a longer span of time.

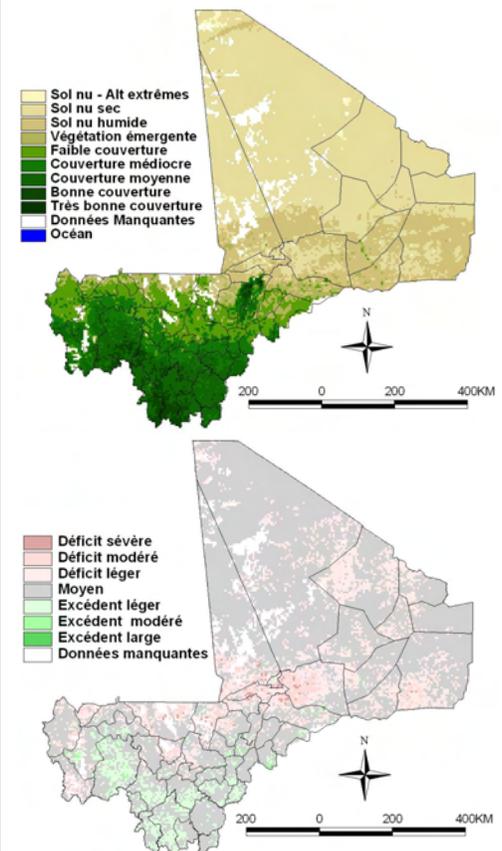
The improvement in and diversification of current food availability with ongoing harvests bode well for an improvement in child malnutrition rates in the country's different livelihood zones.

Pastoral and agro-pastoral areas of Timbuktu, Gao, and Kidal (livelihood zones 1, 2, and 4)

The late onset of the rains in July/August (instead of in June/July as is generally the case in an average year) delayed new pasture growth and development. As a result, pasturelands throughout these areas and in Timbuktu in particular are in below-average condition and sparser than last year, which was, itself, a bad year. The combined effects of two consecutive poor seasons have brought down animal breeding rates, resulting in smaller than usual supplies of dairy products serving as a source of both food and income. Thus, the hunger season has been longer and harsher than usual, particularly in the Gourma area of Timbuktu which, in fact, was reporting unusual losses of livestock back in August.

Despite the widespread new vegetative growth in all parts of the country in August, the end result has been pasture shortages in northern livestock-raising areas, particularly in the Gourma area of Timbuktu and the Gao and Kidal regions. A look at the condition of natural vegetation (NDVI) as of December 10, 2009 shows a deficit in the northeastern reaches of the country, particularly in the Ménaka area (Figure 3). In general, animal watering conditions are good. Recent heavy rains have helped replenish

Figure 3. Satellite image of the normalized difference vegetation index (NDVI) and NDVI anomalies (2004-08) as of December 10, 2009



NDVI legend (above): Extremely bare soil, dry bare soil, wet bare soil, emerging vegetation, weak vegetation, poor vegetation, average vegetation, good vegetation, very good vegetation, no data, ocean.

NDVI anomaly legend (below): Significantly below average, moderately below average, slightly below average, average, slightly above-average, moderately below average, significantly above-average, missing data.

Source: USGS/FEWS NET

surface water resources. However, the low levels of certain watering holes could affect animal watering conditions in localized areas of the northern part of the country.

In general, livestock are still ensconced in their usual dry season grazing areas. However, there are already reports of earlier and larger than usual concentrations of animals in the municipalities of Inekar and Anderamboukane in the Ménaka district of the Gao region, where there are relatively lush pasturelands. The physical condition of animals is normal for this time of year. Milk production is down slightly with the steady deterioration in the condition of pasturelands since October. The numbers of animals for sale on livestock markets are normal for this time of year, and price levels are still in favor of pastoralists. Right now, terms of trade for livestock/grain are advantageous for pastoralists.

Most likely food security scenario for January through June of 2010

This year's production surplus should ensure good nationwide food availability, which suggests that most households should be generally food-secure. The basic assumptions underlying the most likely food security scenario are as follows:

- Nationwide grain availability should be good to average, except in northern pastoral and agro-pastoral areas with poor (crop and animal) production systems.
- This year, production surpluses should be channeled to primarily pastoral or agro-pastoral areas of northern Mali, Mauritania, and other neighboring countries relying on the market system to purchase surplus crops from farming areas without encountering any major, unusual obstacles. In fact, informal barriers to domestic grain trade, which are among the highest in the region, are expected to be lower than usual between January and June in the face of new political pressure.
- The stepping up of village-level food reserve and grain bank programs and other institutional procurements will create a stronger than usual demand for commercially marketed grain crops as of January.
- Foreign demand from certain neighboring countries will also be relatively strong. Such strong foreign demand is attributable to the country's pivotal position between high-demand areas of Mauritania, northern Guinea, and Senegal and surplus crop-producing areas of Burkina Faso, northern Côte d'Ivoire, Ghana, Togo, and Benin. This year, the grain deficit in Niger and civil unrest in Guinea (limiting the access of farmers to their fields) will also play an important role in boosting foreign demand.
- The downward trend in grain prices will continue throughout the month of January, after which prices will begin to rise.
- Certain irrigation canals in the Office du Niger area (livelihood zone 6) will be repaired over the period between January and March.
- Environmental conditions in bottomland areas and wadi beds in Kidal will still be conducive to the survival of desert locust populations. Locust populations will scatter in January/February in search of better living conditions or will gather in and around any remaining patches of green, but without transitioning from the solitary to the gregarious stage. This year, proliferation rates should be normal.

Food security scenario outcomes in farming areas

Areas affected by the performance of repair work on certain irrigation canals in the Office du Niger irrigation district will not have any harvests of off-season crops consisting mainly of rice, onions, and tomatoes. Market supplies of these crops will tighten, affecting their prices. While off-season rice production does not have any major effect on prices, it does help slow the steady rise in prices during the critical period just before the hunger season gets underway.

The general downturn in grain prices through the end of January will be followed by the usual seasonal upswing in prices beginning in February/March. Though price levels are above the five-year average, households should have adequate grain access.

Cash crops such as groundnuts, watermelons, and sesame have really taken off in the past few years as part of efforts to diversify existing sources of income. In general, harvests for this growing season are average and farm-gate prices are quite lucrative, which should help generate income for this group of farmers.

Average to good grain availability from harvests for the 2009/2010 growing season should ensure area households good food access. Surplus crop-producing areas will also ensure the provisioning of high-demand areas during this time. Farm families in these areas should be generally food-secure.

Food security scenario outcomes in agro-pastoral areas

The growing season went relatively well in these areas. However, there were reports of damage from grain-eating birds and localized droughts in Niore district on the country’s border with Mauritania, resulting in a small production shortfall compared with harvest forecasts.

Markets should get regular grain deliveries thanks to the repairing of certain major arteries crisscrossing the area. However, price levels are expected to stay above the five-year average. These deficit and high-deficit agro-pastoral areas meet their grain needs by purchasing crops from the southern part of the country and through trade with Mauritania and Senegal. This year, grain availability in crop-producing areas should be good enough to help provision these high-demand agro-pastoral areas.

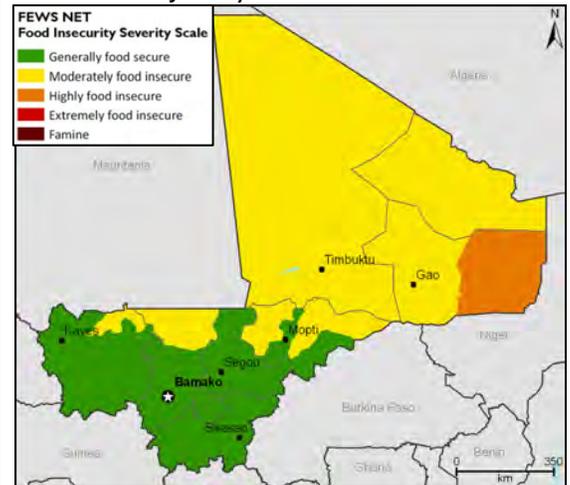
Conditions in livestock-raising areas are satisfactory. Animals owned by local households are expected to produce a good supply of milk. With the good physical condition of local animals, sales of livestock should command lucrative prices for pastoralists. The resulting income will help improve grain access and better meet other household needs. Households in this at-risk area should be moderately food-insecure through the month of June.

Food security scenario outcomes in northern pastoral areas

Livestock-raising activities around the country are in full swing. Pastoralist households in northern livestock-raising areas are profiting from good animal production, particularly those with animals in good physical shape. Looking ahead, as usual, conditions will steadily deteriorate between now and the month of June. This year’s hunger season will begin as early as January or February, instead of in March, as is normally the case. Even in Inekar and Anderamboukane in Ménaka district (in the Gao region) where pastures are in comparatively better condition than anywhere else in the country, current overgrazing problems will degrade pasturelands by as early as February. Households in these areas will resort to different coping strategies, including migration to other areas with better pastures and watering holes. This year, these migratory movements will be especially complicated with the large number of areas in poor condition. This strategy will curtail household access to milk production by these animal herds and will only delay losses of weight by affected animals, particularly in the Ménaka and Ansongo districts of the Gao region. Moreover, there could be disputes over existing water resources.

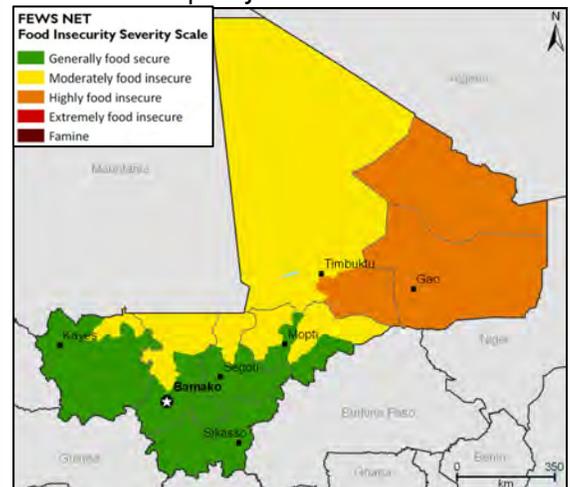
Poor farming (rainfall) and pastoral conditions in Ménaka and the length of last year’s hunger season have created a food gap. To close this gap, pastoralists will sell off more animals than usual, particularly large animals, seeking to avoid large losses of livestock due to poor pastoral conditions. Stepped-up sales of animals between January and March will drive down the price of livestock. While the herds of middle-income and wealthy households are large enough for them to dispose of more animals and still have enough to eat, poor households without the funds to pay for animal feed will be forced to choose between selling or losing their livestock. Thus, they will sell their livestock at lower than usual prices, but do not

Figure 4. Map of projected food security conditions for January - March 2010



Source: FEWS NET

Figure 5. Map of projected food security conditions for April - June of 2010



Source: FEWS NET

have large enough herds to offset their losses by selling off more animals. The resulting loss of income and erosion in terms of trade for livestock/grain will expose poor households to deteriorating access to cereals.

Local trade will slow as demand sputters with the departure of shepherds and their flocks, reducing food availability for sedentary households. Terms of trade for livestock/grain will deteriorate between January and July, curtailing the food access of this group of households. Malnutrition levels will rise at more or less the usual rate for this time of year. Area households will be highly food-insecure for the first half of this year. Thus, it would be wise to provide herd management assistance services to help this group of households sell animals in relatively good physical condition directly to final consumers. The establishment of animal feed stores and the strengthening of existing stores of animal feed could also help sustain the livestock population.

Table I. Precipitating events liable to change the most likely food security scenario in the next six months

Geographic area	Possible precipitating events	Effects on food security conditions	Probability *	Variables to track
Nationwide	Production deficits in Niger and restrictions on imports of Senegalese grain into Mauritania. Massive grain exports to these neighboring countries, a surge in prices followed by likely restrictions on grain exports	Smaller market and trader grain inventories. Restrictions on grain exports weaken official demand, discouraging traders and farmers from selling, keeping market inventories low and prices high. Poorer household grain access.	Unlikely	Influx of traders from these countries on domestic markets, restrictive trade policies
Farming areas	Unusual infestations of grain-eating birds	Shortfall in off-season crop production	Unlikely	Plant health conditions
Nationwide	Deterioration in the socio-political situation in Guinea, Niger, or Côte d'Ivoire	Disruption of inter-country trade and security problems. Temporary relocation of IDPs to border areas (mostly agro-pastoral areas), obliging local communities to share available resources	Unlikely	New developments in the socio-political situation in these countries
Agro-pastoral and pastoral areas	Unusually widespread brush fires	Destruction of pastures. Livestock are required to travel longer distances in search of new pastures. Animals are in worse physical condition than usual, reducing milk production and eroding their market value	Unlikely	Tracking of area brush fires
Northern pastoral areas	Civil unrest	Blocking of supply channels for local residents, displacement of the local population to other safer areas, interference with coping strategies, and poorer food access	Unlikely	Security conditions in these areas
Northern pastoral areas	Unusually large influx of foreign animal herds due to poor pasture production in Niger and elsewhere	Overgrazing and extremely sharp deterioration in the condition of pasturelands, stepped-up fighting. Displacement of the local population to more hospitable areas (in the south, in Burkina Faso, and in the coastal states). The departure of animal herds curtails household access to milk and dairy products and reduces accessible stores of household goods for managing potential problems.	Unlikely	Herd movements into the area
* Probability level	Description			
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			