Key messages

- The arrival of nearly 60,000 Malian refugees (nearly 30,000 in mid-March) in border communities (especially Fassala) has not yet led to strong shocks on local markets.

- Grain prices are relatively stable since January, easing access to imported food, particularly imported substitution foods and especially wheat.

- The government assistance program is underway, but some of the components (free distribution) are not fully funded. The WFP assistance program which aims to support 510,000 Mauritanians for five months is not yet fully resourced.

Seasonal calendar and timeline of critical events

Most likely food security scenario for March through September 2012

Due to a pattern of low, erratic rainfall, nationwide grain production for this past season was 50 percent below last year and 40 percent below the five-year average. At the local level, the rainfed farming zone in the southeast and flood-irrigated farming areas of the agropastoral zone had the worst harvests, as much as 75 percent smaller than average. However, even in an average year, some 70 percent of grain needs are met by imports (sorghum imports from Mali and Senegal and rice imports from Senegal and Mali).
and wheat imports from world markets). Thus, an approximate 20 percent increase in imports, mainly wheat, would suffice to meet the country’s grain needs.

The country’s dependence on grain imports makes Nouakchott the main supply hub for markets in the interior. Trends in prices in Nouakchott are closely correlated with the levels of world market prices. However, these international price trends are not necessarily reflected in prices on local markets, where supply, demand, and trader behavior are affected by local dynamics. In general, the stability of domestic prices will depend on factors such as market stability and normal market performance in Mali and border areas, stable international prices, normal rainy season conditions, and stable fuel prices.

Prices for imported rice and wheat on primary markets trended downwards or remained stable between January and March. Prices for imported rice and wheat on markets in Nouakchott and in the interior were also relatively stable or came down slightly between February and March. Wheat prices in Nouakchott and Adel Bagrou came down by 12 and 7 percent, respectively. This small drop in prices, also observed in Kankossa, could be attributable to factors such as the rebound in Malian trade in sorghum and millet, the distributions of free supplies of wheat by humanitarian organizations, and the rains in the north, reducing pressure from camel herds in the country’s agropastoral zone and the northern reaches of the rainfed farming zone.

There was a decline in the price and availability of imported rice and wheat on virtually all primary markets between January and March. This trend in prices reflects the overall comparative stability of prices for imported rice between February and March, which rose 10 percent in Nouakchott but fell by 9 percent in Adel Bagrou. Though edging downwards in Nouakchott (by 7 percent between January and March), in certain rural areas, the price of wheat sold by the government at 3500 MRO is already over 7000 MRO. Price increases in pastoral assembly areas of Assaba, Hodh El Gharbi, and Hodh Ech Chargui are especially large. Certain rural markets in the agropastoral zone (Tintane and Magta Lahjar) are reporting 20 to 30 percent hikes in prices due to heightened competition between human and animal consumption needs, boosting demand across-the-board.

March prices for staple foodstuffs were higher than last year all across the country. Prices for imported grain are moderately higher than last year. Wheat prices are up by as much as 20 percent and rice prices by 10 to 25 percent. Government-subsidized wheat prices are at 3500 MRO. Current sorghum prices are up sharply from last year, by anywhere from 50 to 100 percent depending on the market location. The Adel Bagrou market (in the rainfed farming zone) is reporting extremely large spikes of 65 percent compared with prices for the same time last year.

In general, imported rice is more expensive than local rice and grain sorghum. Wheat is normally the least expensive grain. However, sorghum prices on certain markets have been outstripping prices for imported rice since last November or December. Presumably, households are turning to imported rice as a substitute for sorghum.

There are also signs of a speculative trend in the rising price of transportation. The cost of renting a ten-ton truck (between Nouakchott and Nema) jumped from 150,000 MRO to 250,000 MRO since March of last year, a 94 percent increase in one year’s time. However, despite the repeated hikes in diesel and shipping prices (which went from 15 to 25 MRO/kg between Nouakchott and receiving areas for refugees in the southeast), prices for certain items have not dramatically increased.

The influx of close to 60,000 Malian refugees in border areas (mainly in Fassala district) and the regarding future arrival trends have not yet produced any severe shocks to local markets. As of April 24th, most refugees in camps had received only a single seven-day food ration upon their arrival. The Mauritanian government has still not formulated an assistance program for this refugee population. According to the UN OCHA, the WFP has 357 MT of food aid in Bassikounou reserved for the refugees. Distributions have started up, but will only meet the needs of 56,000 refugees for a four-week period. The inadequacy of distributions of food aid to date has prompted a number of refugees to begin leaving the camps for surrounding villages. Continuing water supply problems are keeping the daily ration at 9 liters per person. Ongoing local grain procurements (700 metric tons of rice) will cover two months worth of food needs. Unable to mobilize all necessary program funding, the WFP is expecting to be forced to suspend its program by the middle of May.

The recent political events in Mali have not yet created any market disruptions in terms of staple food availability or any disruptions in the flow of (formal or informal) cross-border trade. Though smaller than usual, the volume of cross-border trade is still able to sustain normal market behavior. However, the assumption is that there will be no change in the civil
security situation in either Mali or Mauritania and that the Malian conflict will have more adverse effects on pastoralists and on demand for labor in neighboring destination areas of Mali for very poor and poor Mauritanian households. Moreover, civil security threats in cities close to the Malian border are slowing seasonal labor migration to urban areas severely impacted by or closest to crisis areas. Grain markets should continue to perform normally between now and September.

There are government assistance programs underway all across the country (not limited solely to impacted areas) targeted at 109,850 households experiencing a food crisis, which will be staggered over a five-month period. These programs include the operation of government-subsidized shops (boutiques de solidarité) and village-level food security reserves (SAVS) from which households can purchase staple foods (wheat, rice, sugar, oil, milk, etc.) at discount prices (20 to 40 percent below market prices). The restocking of the so-called “solidarity” shops, subsidized sales programs for animal feed, and village-level food security reserves (SAVS) is a matter of simply recouping costs and reordering supplies. However, the distributions of free food aid which started up in March are still short of supplies by two months (May and June). The WFP assistance program for 510,000 Mauritanian beneficiaries is not scheduled to begin until June, with the arrival of 3100 MT of food aid.

The most likely food security scenario for the period from April through September 2012 in both focus areas outlined on the following pages is supported by the following general assumptions:

- Based on an analysis of medium-range weather forecasts, the rainy season should progress normally and crop calendars should be respected.
- The current political status quo in Mali will be maintained for the next six months, with no radical changes in its impact on trade flows and market supplies, being as there are no indications of a breakdown in the current civil security situation in Mauritania.
- Prices for imported rice and wheat will remain stable or decline during the outlook period (April-September) all across the country, but will still be relatively high at the beginning of the rainy season in June.
- In contrast to nationwide price trends, prices on rural markets are likely to rise sharply by between 10 and 20 percent, particularly in the southeast (in the rainfed farming zone) and in the central and eastern reaches of the agropastoral zone, driven by high demand for both crops fueled by continuing competition between needs for animal feed and human consumption needs between now and July. With the shortage of pasture and limited supply of animal feed, pastoralists in the agropastoral zone will continue to use wheat as animal feed. The already high demand for wheat will only continue to grow stronger as the problems in Mali begin to force Mauritanian pastoralists in that country to return home, translating into new hikes in wheat prices between May and July.
- Thus, the price of wheat, the main substitute grain due to its generally low cost (140 to 160 MRO/kg in March), will continue to rise between now and July in both the rainfed farming zone and the agropastoral zone, driven by strong demand for human consumption and animal feed. Prices for imported rice stabilized in March and will remain stable between now and September. The flow of trade from Senegal will be limited mainly to rice imports. Since these imports involve only re-exports of rice, except at harvest time, prices will remain stable between now and September.
- Rice farmers will have timely access to farm credit.
- With Mauritanian migration to already overpopulated pastoral areas of southwestern Mali isolated by the conflict in that country, milk availability has been negligible since January (four months earlier than usual). This earlier than usual shortage of milk and dairy products will create food and funding gaps for pastoral households between now and August.
Local demand for labor and internal migration rates will be more or less in line with seasonal norms, with the growing season expected to begin in June.

Outside demand for labor and wage rates will also be on par with the norm (between 1000 and 1500 MRO, depending on the type of farm labor).

Return migration by transhumant herds will begin in July but will not start to intensify until September. Recent droughts are making transhumant pastoralists more cautious.

Poor households in the rainfed farming zone and agropastoral zone will have difficulty obtaining seeds for the new growing season beginning in July. While this is a recurring problem (in roughly eight out of ten years), seed access could be especially problematic with the poor harvests of coarse grain crops in the country’s two main sources of seed supplies (Mali and Senegal).

Current assistance programs mounted by the government, the WFP, and NGOs will be extended into June, including distributions of more free food aid than in 2010 and 2011. However, this aid will not suffice to meet all food needs between now and September of this year.

Markets will continue to be well-stocked with grain, but grain trade in rainfed farming areas is expected to slow, particularly with the poor road conditions during the rainy season.

Environmental conditions are not conducive to the survival and propagation of desert locusts.

In general, poor households in the southeastern reaches of the rainfed farming zone (Bassikounou, Amourj, and Djiguenni departments) and the central and western reaches of the agropastoral zone (Tintane, Tamchakett, Kiffa, Kankossa, Barkéol, Moudjéria, Tidjikja, Magta Lahjar, and Aleg departments) especially dependent on crop production and demand for farm labor, local pastures, and wild plant products and reliant on market-buying for a large part of their food supply will be facing a food crisis between April and September (Figures 2-3). For the most part, this group consists of very poor and poor pastoral and farming-oriented households, which could be facing severe shortages of food and income throughout the outlook period. A normal start to the rainy season in June/July will stabilize household purchasing power to some extent by the beginning of July with the start-up of farming activities (preparations for the planting of flood-recession crops, internal migration by unskilled laborers, and rainfed farming activities) affording income-earning opportunities and the improvement in the condition of pastures.

**Outlook for the rainfed farming zone**

Most of the population of this livelihood zone (80 percent) is completely dependent on rainfed (diéri) crops harvested in September and October. Poor households make up 60 percent of the population. Demand for farm labor in Mali between January and June, affecting around 20 percent of the total population of this area and furnishing approximately 12 percent of their annual income from this source, is approximately 50 percent lower than usual, with fewer job prospects for laborers with the skills level of Mauritanian migrants. This is a direct result of the poor farming conditions for the 2011-2012 season in border areas of Mali serving as destination areas for migrant workers from Mauritania. Supplies of wild...
plant products and firewood, which normally furnish approximately 15 percent of annual household income, are sharply reduced (at most, five percent of normal). Even double the usual volume of sales of small animals (four instead of the usual two out of seven animals sold by poor households), the source of five percent of annual household income in an average year, will not cover crop production shortfalls due to the seasonal decline in livestock prices (by 20 to 40 percent between April and June). Moreover, this year, these sales, which are normally limited to the period between May and July, began as early as January and have already depleted household herds. As a result, these households, which are not normally completely dependent on local markets until the beginning of March (for 38 percent of their annual food supply), have been market-dependent since January and will remain so until the first harvests of short-cycle crops in September. Hence their vulnerability to the 40 to 60 percent jump in food prices since last year. The earlier than usual flow of out-migration starting in October of last year, which does not normally begin until April, indicates the inability of these poor households to meet their food needs locally.

The approximate 50 percent shortfall in the October harvest has already translated into a comparable need for poor households to increase their food purchases at least five months earlier than usual. Thus, they will be reliant on market-purchase for approximately 55 to 60 percent of their food supplies throughout the outlook period, compared with only 35 percent in an average year. Given current price trends, prices for wheat and rice are likely to rise by between 10 and 20 percent between April and July compared with March figures. In an average crop year, part of these needs is met with income from normal local and outside employment in farming activities between June and August. Daily wage rates, which were up by 50 percent from the 2010/11 season between July/September of last year and February of this year, have since fallen back down to their previous level. Income from farm labor for the 2011/12 crop year (between five and 20 percent of annual household income depending on the area and wealth group in question) is approximately 50 percent below-normal. The situation could get worse between April and June with this year’s limited job prospects. This is heightening the food insecurity of poor households, which have been classified in IPC Phase 3 (crisis) since February of this year.

The larger supply of labor with the completion of the harvest of bottomland crops reduced the number of work days per week from three to two between February and March. The sudden influx of Malian refugees and the mounting unrest in this area have limited prospects for increasing the flow of trade to keep pace with the growth in demand. However, in the event of the continuation of the conflict in Mali and continuing restrictions on labor force mobility, the only areas expected to see a deterioration in current conditions to IPC Phase 4 (emergency) between May and July would be refugee receiving areas (Bassikounou department and probably Amourj and Djiguenni departments and the southern reaches of Néma department), where poor Mauritanian households are likely facing an erosion in their access to food and water. In the meantime, assistance programs, however limited, are targeted mainly at Malian refugees. In other parts of this livelihood zone, the start-up of farming activities in July should help restore access to normal levels of household income, thereby improving food access on local markets. Food insecurity levels should gradually come back down to IPC Phase 2 (stress) between August and September, until the main harvest in October/November. Projections of food security outcomes in the rainfed farming zone are based on the following assumptions:

- There will be a large steady decline in migration income between April and June which, on average, accounts for 20 percent of total household income.
- There will be average to above-average levels of seasonal income from farm labor between July and September.
- The size of areas planted in crops will be consistent with the average.
- Pastoral conditions will normalize as of July, eliminating the need to purchase animal feed. There will be a normal pattern of return migration by transhumant herds, improving access to milk, an important source of food and income.
- The government, humanitarian organizations, and development agencies (FAO, AAH, etc.) will provide seed aid for poor households without access to sufficient quantities of seeds for a good harvest between May and June.
- Markets in border areas will get regular supplies of Malian grain exports.
- There will be a 10 to 20 percent rise in staple food prices on proximate markets for refugee populations between April and July from current price levels.
- Assistance programs will be extended at least through August.
- Normalization of the Malian conflict will allow for the free movement of labor and animals in that country.
- Farming conditions in Mali will be close to normal.
Outlook for the agropastoral zone

Poor households make up 60 percent of the population of this livelihood zone. Typically, 35 percent of their annual food needs between January/February and August are met through market purchase. These purchases (roughly 20 percent) are made with income from flood-recession crop sales and cash loans secured by liens on future harvests or future income from on-farm employment. Approximately 40 percent of the annual income of this group of households comes from out-migration between March/April and June. The share of other sources of food and income, including milk and meat consumption, livestock sales, gifts, small-scale trade, and the gathering of wild plant products, is negligible (less than 10 percent each for the year). With the exception of households in the eastern reaches of this area who are largely dependent on camel herding and, thus, less affected by current conditions than pastoralists raising cattle and sheep, poor households in this livelihood zone classified in IPC 2.0 Phase 2 (stress) since December of last year have since moved into IPC Phase 3 (crisis).

This year’s harvest of flood-recession crops covered only one month’s worth of food needs and, with the size of viable areas for the growing of these crops severely curtailed, any income from employment in these farming activities was negligible, with the smaller than usual work load covered by family labor. Despite the larger numbers of migrants, there was a sharp decline in migration income between January and March. Low water levels in bottomland areas between November and January cut production in these areas by more than 75 percent (to one month’s worth of food instead of four, as is generally the case in an average year). Income from pastoral activities was also down by 70 percent due to the earlier than usual departure of transhumant herds with the poor condition of pasture.

Projections of food security outcomes in the agropastoral zone are based on the following assumptions:

- Up 50 percent between January and February, daily income from local employment fell back in line with normal seasonal figures between March and April, as work schedules were cut by 80 percent with the departure of over 70 percent of the area’s transhumant animal herds. This will continue to be the case through July.
- Seasonal income from internal migration (to neighboring areas) is 25 percent below-normal, which will only aggravate the negative effects of the 50 percent decline in income in January during the upcoming period from April to July, with most payments in the form of food rather than cash. This will erode the food purchasing power of poor households which typically purchase 35 percent of their annual food supply by approximately 50 percent between April and July.
- Households selling livestock will face unfavorable terms of trade between April and July in spite of a sharp decline in supplies on livestock markets due to their total market dependence between now and August (for nine months instead of the usual four months).
- There will be further rises in rice and wheat prices between April and August in the western and northern reaches of this livelihood zone. With over 75 percent of local livestock herds already in Mali or Senegal and the rainfed farming zone (between this area and Mali), there is less demand for wheat in this area, which should mean smaller hikes in prices than in the rainfed farming zone.
- Camel herds will return to northern pasturaleands with the April rains.

Wheat will continue to be the cereal of choice for poor and middle-income households and will also continue to be used as animal feed. Assuming that importers are able to ensure a regular supply of wheat, competition between low-income pastoralists and consumers in what are oftentimes remote areas or areas with poor roads and transportation facilities will keep supplies low on certain markets. To deal with this situation, households will continue to sell livestock, driving down prices. Assuming a normal decline in livestock prices (by 20 to 30 percent in the best-case scenario), an average sheep will sell for only 9,500 MRO between April and July (compared with its current price of around 12,500 MRO). This will put terms of trade for sheep/wheat at close to 53 kg, the equivalent of 300 grams per person per day based on an average national household size of 5.9 members. This is 46 percent less than the standard of 440 grams per person generally used in assistance programs. This will heighten the food insecurity of agropastoralists (livestock-oriented agropastoralists raising cattle and sheep) to, at most, IPC 2.0 Phase 3 (crisis), since the risk of aggravating livelihood losses is mitigated by the departure of transhumant animals, while ongoing assistance programs (SAVS, SACS, and so-called “solidarity” shops) should reduce their dependence on the market. Furthermore, with the rainy season expected to get off to a normal start, the improvement in pastoral conditions as of late July (the beginning of the rainy season) should normalize conditions for this
group of households by the beginning of August, putting them back down in IPC 2.0 Phase 2 (stress) until the September harvest.

**Outlook beyond September 2012**

Trends in food insecurity after the end of September of this year largely depend on the following assumptions:

- Coarse grain prices will drop by approximately 50 percent from their current levels.
- Despite their high prices, poor households will have timely access to seeds for the planting of flood-recession crops through credit and/or outside assistance (distributions of free seed aid).
- With the normalization of the Malian conflict, farming activities will get back to normal, putting poor area households back in IPC Phase 2 (stress) as of September.
- The size of the food-insecure population, currently estimated at 800,000, which is nearly triple the figure for last year, will be scaled back to near-normal proportions between September and November in all rural areas of the country.

**Table 1. Possible events in the next six months which could change the most likely scenario**

<table>
<thead>
<tr>
<th>Area</th>
<th>Event</th>
<th>Impact on food security conditions</th>
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<tbody>
<tr>
<td>Nationwide</td>
<td>Suspension or restriction of cross-border trade in grain and livestock with Mali and Senegal.</td>
<td>Low supplies on markets in Nouakchott; large losses of animals; reduction in migration income for poor households in the southeast with members working in the Niger Delta area of Mali.</td>
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<td>Strong recovery by industry, creating jobs.</td>
<td>More employment opportunities and improvement in income, particularly in urban fringe areas with large migrant populations.</td>
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<td>Targeted emergency food aid programs for at least 800,000 poor beneficiaries at risk for acute food insecurity concentrated mainly in the southeastern reaches of the rainfed farming zone and the central and western reaches of the agro-pastoral zone.</td>
<td>Reduction in the severity of current food insecurity levels from, at most, IPC Phase 3 to IPC Phase 2.</td>
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<tr>
<td>Agropastoral zone</td>
<td>Large-scale locust infestation.</td>
<td>Destruction of flood-recession crops (in bottomland and dam areas), increasing projected food gaps in the most likely scenario.</td>
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<td></td>
<td>Epizootic outbreak. This is a recurring phenomenon observed whenever there is a sustained deterioration in pastoral conditions in which a resurgence of certain local diseases causes enfeebled animals to die in large numbers.</td>
<td>Larger losses of livestock than projected in the most likely scenario.</td>
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<tr>
<td></td>
<td>Rise in livestock prices, driven by a growing demand engendered by assistance programs mounted by the government and humanitarian organizations.</td>
<td>Improvement in terms of trade compared with last October and lower levels of food insecurity than projected in the outlook.</td>
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<tr>
<td>Rainfed farming zone</td>
<td>Climate of insecurity and restrictive measures.</td>
<td>Restrictions on the free movement of goods and travelers between Mauritania, Mali, and Senegal.</td>
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