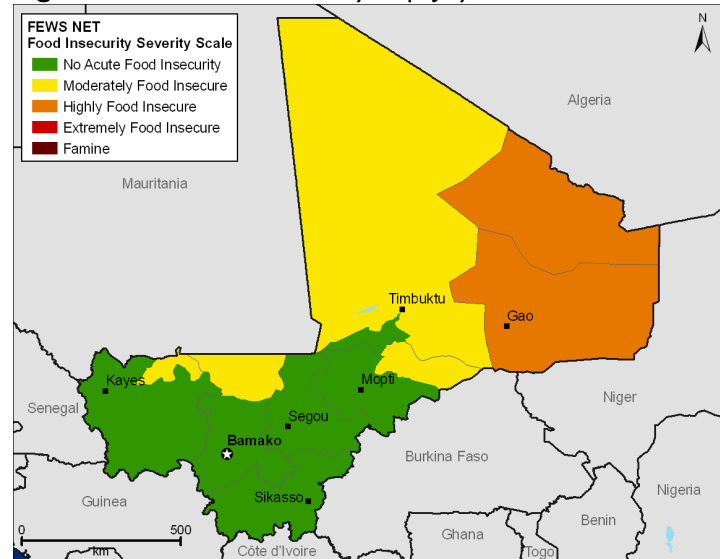


MALI Food Security Outlook

July through December 2010

- The temporary pause in rains in June/July delayed the definitive start of this year's rainy season in pastoral and agropastoral areas of northeastern Mali. This will delay the regeneration of pasturelands and prolong the lean season for poor and very poor pastoral households in these areas into mid-August.
- Programs conducted by the government and its partners (distributions of free food assistance, subsidized food and livestock feed sales, nutrition support, the rehabilitation of water sources, etc.) should continue to ease food security problems for pastoral and agropastoral populations in Gao and Kidal region.
- This year, Ramadan takes place between mid-August and mid-September, creating a high demand for millet at the peak of the agricultural lean season. However, this year's lean season is expected to be somewhat less severe than usual thanks to good grain availability at the household level, in grain banks, and from trader inventories. Markets are well-stocked with grain crops and prices are stable or inching upwards.

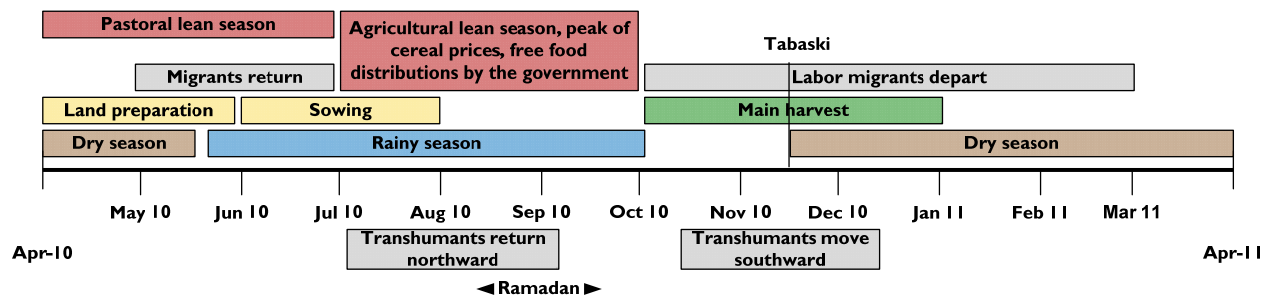
Figure 1. Current food security map, July 2010



For more information on FEWS NET's Food Insecurity Severity Scale, please see: www.fews.net/FoodInsecurityScale

Source: FEWS NET

Seasonal calendar and critical events



Source: FEWS NET

Most likely food security scenarios (July - December 2010)

The good 2009/10 grain harvests in agricultural areas across the country point to an easier than usual lean season this year, thanks to good household grain availability and large reconstituted precautionary reserves. There are no reports of any restrictions on or barriers to the free circulation of commodities at the country level. Thus, last season's good grain harvests are helping to maintain good food availability in all parts of the country. Prices for different types of grain on retail markets across the country are stable or increasing slightly.

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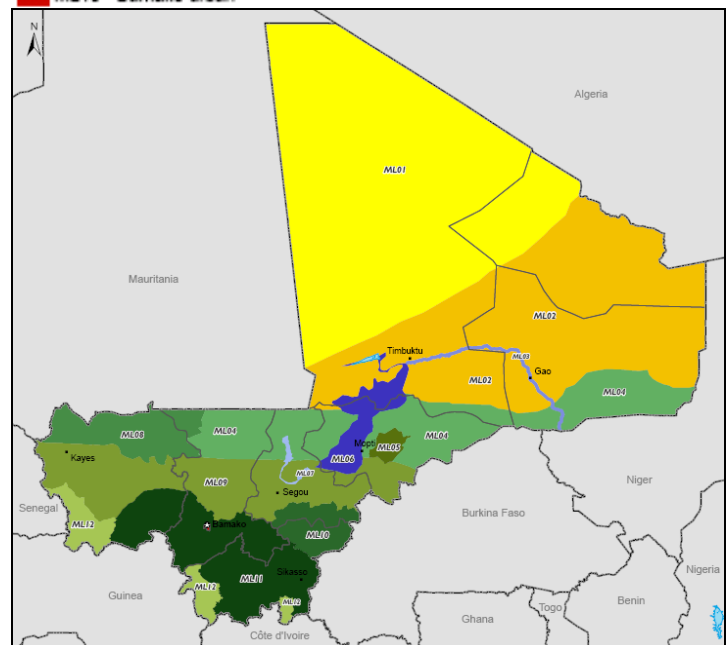
Despite these auspicious nationwide conditions, last year's shortened rainy season caused this year's lean season in pastoral areas to begin earlier than usual, in February instead of in March/April, as is generally the case in an average year, and cut normal crop production levels by more than 50 percent, particularly in Ansongo, in the northeast. The lean season for pastoral populations extended into July, with the rainfall deficit in these areas since the second dekad of June prevented any further regeneration of pasturelands, which had begun to sprout new growth with the first rains in June. Animals have been dying of hunger and thirst since May, particularly those of poor households unable to afford to buy animal feed and trapped transhumant animals forced to leave agricultural areas to allow farmers to begin planting crops before pasturelands had recovered. The continued large supplies of animals on the markets from households looking to avoid a complete loss by thinning their herds and to generate enough income to buy animal feed and grain supplies and the low demand for livestock in poor physical shape have cut the usual incomes of middle-income and wealthy households on which poor households are dependent for employment. Markets are still regularly stocked with grain, and prices are hovering around the nominal five-year average and are relatively stable in the face of a normal demand for grain (see the price annex). Distributions of free food aid and the various programs mounted by the government and its partners have minimized any problems with food shortages in the Gao and Kidal regions of northeastern Mali.

According to a recent survey conducted by Action Against Hunger in Ansongo department this past June, global acute malnutrition rates in the municipalities of Ansongo, Bara, and Bourra, which normally exceed the 15 percent emergency threshold at this time of year, though above this figure, are not significantly different from last year. Data furnished by the health department for the Gao region shows that total admissions to therapeutic feeding centers nearly doubled between January and May of this year, jumping from 1045 to 2095. However, the cumulative number of admissions so far this year is well below last year's figure. Despite investments by the government and its partners in programs for the treatment of malnutrition problems across the region, the heads of treatment facilities are still reporting shortages of needed supplies for these services, which only serve to discourage their use.

In a context of slowly recovering pasturelands, adequate assistance, and a dependence on well-stocked markets posting near-average prices by households with lower than usual incomes from sales of livestock, the major shocks and events affecting conditions in these two food-insecure areas in the next six months are as follows:

- While the growing season got off to a good start in surplus crop-producing areas of southern and western Mali, it has still not gotten underway in rice-farming areas of central Mali (livelihood zone 6 and surrounding rainfed and floodplain farming areas).

Figure 2. Livelihood zone map of Mali



Source: FEWS NET

- Weather forecasts are still predicting normal to above-normal rainfall activity in all parts of the country during the rainy season from July to September. There should not be any major infestations of crop predators, and there should be a normal availability of farm inputs. Thus, crop production levels for the country as a whole should be average to good, with harvests of green crops beginning as of September, the main harvest of rainfed crops in October/November, and the rice harvest beginning in December. These harvests should strengthen food availability on domestic markets and trigger normal downswings in prices between October and December.
- The high market demand for grain, with household food stores at their lowest level of the year between July and September, will trigger a normal seasonal upswing in grain prices. This year, the month-long observance of Ramadan by Muslim populations begins in August, coinciding with the lean season in farming areas. The high demand associated with this observance period, particularly for millet, will trigger unusually sharp hikes in millet prices as the lean season reaches its height. Ramadan is also a time of gift-giving, particularly gifts of food. The assumption is that any food access problems faced by the poor as a result of the rise in millet prices will be offset by the substitution of less expensive grains such as corn and by gifts from wealthy households.
- *Eid al-Adha* (Tabaski) is a high-demand period for sheep, with demand for other types of livestock peaking in December. Livestock prices should begin to rise as of the middle of October.
- The government and its partners will continue to assist residents of Gao and Kidal between July and September through sales of grain and animal feed at subsidized prices, distributions of free food aid, and the strengthening of therapeutic feeding centers in these areas.
- There should not be any unusual formal or informal barriers to the regular flow of trade in grain and livestock between different parts of the country or with foreign countries. Exchange rates for major regional currencies should stay relatively stable.

Figure 3. Projection of the most likely food security scenario for July through September 2010

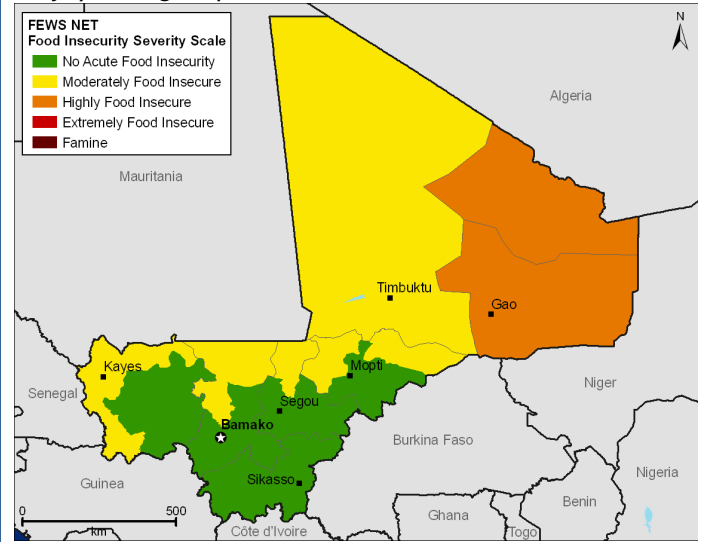
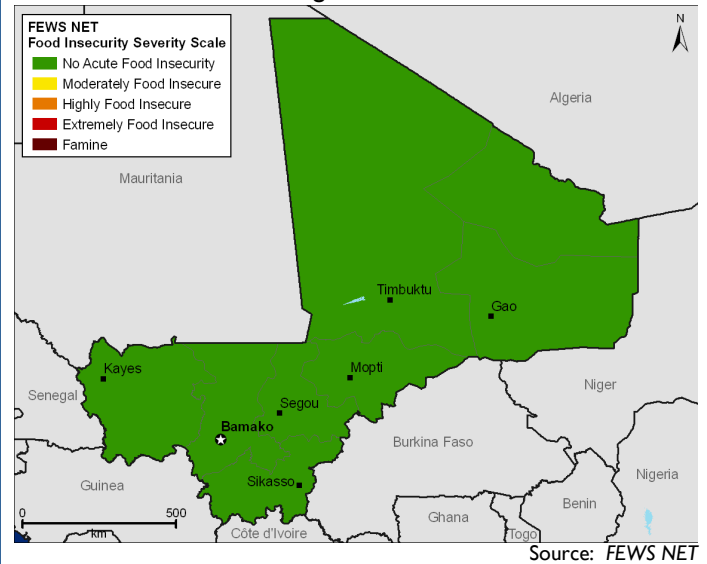


Figure 4. Projection of the most likely food security scenario for October through December 2010



Food security scenario for northern pastoral areas (Livelihood Zone 2 - Gao/Kidal: Nomadic and transhumant pastoralism)

Poor and very poor households in this livelihood zone depend on the market for 60 percent of their food supplies and on in-kind payments for another 10 percent. Fifty to sixty percent of the income used by these households to purchase food supplies on the market comes from local employment largely involving the livestock of wealthy households (primarily from jobs as shepherds, from tending and watering animal herds, and from domestic employment), while sales of livestock bring in 80 percent of the income of wealthy households.

Last year's poor rainfall conditions cut normal pasture production by more than 70 percent and created shortages of drinking water for livestock for the second consecutive year. This year's lean season in pastoral areas began earlier than usual, or in February instead of March, as is normally the case. In reaction to the shortages of pasture in Hausa communities, middle-income and wealthy pastoralists with large animals (mainly cattle) left the area by December-January for Gourma, Gao, and Timbuktu in an unusual pattern of seasonal migration designed to help save their herds. These migratory movements usually begin later in the year, in March-April, and are basically confined to the same livelihood zone. Upon their arrival in Gourma, for the first time, certain pastoralists, particularly wealthy pastoralists, resorted to the use of tank trucks to water their animals as part of a new coping strategy. The holding areas (for the livestock of the Tuareg, the Fulani, and the Soninkés) are Gourma and the municipalities of Inékar and Andéramboukane in Ménaka department.

To make up for their lower incomes from sales of livestock in poor physical condition and in-kind payments from dwindling employment opportunities with wealthy households suffering from losses of their own livestock, poor pastoralists have stepped up sales of their few remaining animals in weakened condition, which has driven down livestock prices, cutting the volume of annual household income generated by these activities for poor and very poor pastoralists by 15-25 percent.

Cumulative rainfall totals in the Timbuktu and Gao regions for the period from May 1st through July 20th are slightly below-normal. Right now, conditions in livestock-raising areas (pasturelands and watering holes) are still poor, though they are slowly beginning to improve with the first rains of the season. The rainfall deficit since the second dekad of June has prolonged the lean season by preventing any further regeneration of pasturelands, which had begun to sprout new growth with the first rains in early June.

The different types of development assistance furnished by the government and its partners (distributions of free food aid, supplies of animal feed, the rehabilitation of water sources, nutrition support, etc.) have been easing food security problems for area households since May. Poor and very poor households are depending on these assistance programs to meet a large part of their food needs.

The following shocks and events will significantly affect conditions in this livelihood zone between July and December:

- Herd size in this area will be cut by 40 percent due to losses and sales of animals as a source of income for purchasing grain and animal feed. The rebuilding of these herds could take as long as two years.
- Certain assistance programs will be extended into September, particularly those targeted at poor and very poor households in this area.

The long lean season for the area's animal population, which began back in February, will continue into the middle of August, until the rainy season definitely settles in, allowing for the recovery of pasturelands and the replenishment of watering holes, exposing poor and very poor households to high levels of food insecurity until late July/mid-August.

This begins the recovery period for livestock, once the growth of new plant cover is complete and the levels of watering holes are back to normal. Until then, animal herds will continue their trek back to their respective home areas.

These shocks during the projection period from July through December will cut normal levels of milk production by approximately 20-40 percent, particularly for the poor, due to the reduced size and deterioration in the physical condition of animal herds. These shortfalls in milk production will force the poor to cut back their consumption of milk and dairy products. Milk production should pick up between October and December as the condition of pasturelands and watering holes improves. Moreover, household diets will be less diversified between July and September, particularly those of children in poor and very poor households, in some cases, including cutbacks in the number of daily meals. Dwindling employment opportunities for the poor with wealthy households (poor household members are paid to guard animal herds according to the number of head of stock) will cut the income of this group of poor households by roughly 30-60 percent. Reductions in the number of head of stock available for sale and the erosion in their market value will cut household income even further.

In order to meet their needs, these households will continue selling animals in weakened condition, particularly in July and August. These are pastoral groups whose livelihoods are largely dependent on livestock. Migration to increasingly lush grazing lands in this region will steadily pick up.

The seasonal upswing in acute malnutrition rates between July and September will put them slightly above-normal, but they should return to normal between October and December. Poor and very poor households will be highly food-insecure through the middle of August.

Patterns of seasonal migration and other herd movements, as well as the physical condition of livestock and animal production levels should be back to normal by mid-August. The steady recovery of pasturelands and the replenishment of watering holes should enable livestock to get back in peak physical condition. The large concentrations of animals in areas with the most new pasture growth will gradually scatter. The supply of animals for sale on area markets will tighten in September as sales of animals by area households begin to slow, with pastoralists commanding higher prices for livestock in better physical condition and profiting from favorable terms of trade for livestock/grain. Household diets will become more diversified and malnutrition rates will come down.

With the extension of food aid and other types of assistance programs into September, poor and very poor households in pastoral areas of the Gao and Kidal regions will be generally food-secure between September and December, by which time conditions should improve, though the rebuilding of their livestock herds will require more time. According to current weather forecasts, good nationwide conditions, with large harvests of coarse grain crops in October-November in central and southern farming areas provisioning the country's northern regions, should further strengthen the food security situation in this livelihood zone. However, as of January, following this auspicious period for the country as a whole between October and December, pastoralists could begin to feel the effects of the diminished size of their herds, whose rebuilding will require more time.

Food security scenario for northern agropastoral areas (Livelihood Zone 4 - Gao: millet/transhumant livestock rearing)

Local crop production in agropastoral areas of Gao accounts for 55-75 percent of the food supply of middle-income and wealthy households and 10-15 percent of that of poor and very poor households. Last year's poor growing season significantly reduced and, in some cases, completely wiped out the share of household food supplies produced locally. Poor and very poor households in this livelihood zone normally depend on the market for 50-60 percent of their food supply, on in-kind payments for another 15-20 percent, and on crop production for 10-15 percent. Most members of poor households are unskilled laborers earning the majority of the income used to purchase food supplies on local markets, which are their main food source, from a combination of on-farm employment (5-20 percent) and other types of work (30-40 percent), which includes guarding the livestock of middle-income and wealthy households, brick-making, plaster work, and building houses. The problems faced by middle-income and wealthy households after last year's growing season slowed demand for labor, cutting the income normally earned by poor and very poor households from local employment with middle-income and wealthy households by 40-60 percent. This year, area households, particularly poor households, have been increasingly dependent on local markets for their food supplies since March, to make up for shortfalls in crop production and in-kind payments.

Pasture deficits in this livelihood zone are similar to those in transhumant pastoral areas (livelihood zone 2). However, the area's vulnerability to this particular shock is somewhat different. Sales of livestock account for 10-15 percent of the income of poor and very poor households and 30-35 percent of the income of middle-income and wealthy households. The share of milk consumption as a source of food for the poor is approximately 5 percent, and 5-10 percent for middle-income and wealthy households. Premature herd movements to good seasonal grazing lands as early as January created unusually large concentrations of animals in these areas. Pasturelands are still in poor condition, with new vegetative growth only just beginning to sprout, except in a few pockets in the Tessit-Quattagouna-Niger triangle where there are large concentrations of livestock. The levels of watering holes are rising after the first rains of the season. In general, animals are in poor physical condition, and the long lean season for the animal population, which began back in February, will continue into the middle of August, until the rainy season definitely settles in, allowing for the recovery of pasturelands and the replenishment of animal watering holes. This begins the recovery period for livestock, once the growth of new plant cover is complete and the levels of watering holes are back to normal. Until then, animal herds will continue their trek back to their respective home areas. Poor and very poor households will be highly food-insecure between July and the middle of August.

Programs mounted by the government and its partners in this livelihood zone are further strengthening household grain availability and access.

Since last year, this area has been reporting civil security problems connected with the ethnic fighting between the Tuareg and the Fulani, including thefts of cattle, armed robberies and assaults, etc, particularly in the Ansongo area bordering on Niger. For some time now, there have been reports of unusual migratory movements by households in the municipalities of Bourra and Ouattagouna to Niger and Nigeria in the face of these security threats. These problems are restricting the normal movement of people and goods, particularly that of local pastoralists, undermining their ability to cope with the challenges presented by the current lean season.

The following shocks and events will significantly affect conditions in this livelihood zone between now and December:

- With the growing season about to get underway, there is a limited availability of rice seeds in livelihood zone 3 (fluvial rice and transhumant livestock rearing) and of millet seeds in livelihood zone 4 (millet and transhumant livestock rearing) in Ansongo and Ménaka, respectively.
- Herd size will be cut by 40-50 percent as a result of losses and livestock sales in July and August.
- The current 30 to 40 percent scale-back in employment opportunities for poor household members with wealthy households (guarding the livestock herds of middle-income and wealthy households, making bricks, plastering, and building houses) will continue into August.
- Development assistance programs by the government and its partners for certain populations in the form of distributions of free food aid and on-farm improvements to bolster crop production will be extended into September.

These shocks will delay the start-up of the growing season in July-August which, combined with shortages of rice and millet seeds in Ansongo and Ménaka, will bring down planting rates. Levels of household milk production and consumption will be lower than usual between July and September due to the diminished size and poor physical condition of livestock herds, particularly in the case of poor households. Households diets will also be less diversified, especially those of children in poor and very poor households, in some cases, including cutbacks in the number of daily meals. Local household income, especially that of poor and very poor households, will be cut back by 40-60 percent with fewer heads of stock available for sale and the erosion in their market value, and the 30 to 40 percent fewer employment opportunities available for the poor with wealthy households.

The need to offset crop production deficits and shortfalls in household income due to scale-backs in employment opportunities for the poor with wealthy households will prompt this group of poor and very poor agropastoral households to continue selling poultry and their few remaining animals in poor physical condition to complement proceeds from labor migration and cash remittances. The falling prices of poultry and livestock have cut the income of these poor and very poor agropastoral households by 50-65 percent.

This group of households will be highly food-insecure until late July/mid-August or, in other words, throughout the normal recovery period for crop growth and development, the regeneration of pasturelands, and the replenishment of animal watering holes.

Conditions will improve between mid-August and December with the availability of fresh crops, though the rebuilding of livestock herds will require more time. There will be adequate supplies of grain and other staple foodstuffs on all major markets at relatively stable prices for that time of year. These households should not face any current food insecurity problems between October and December, following the harvesting period, with the good food availability at that time of year in all parts of the country. Malnutrition rates should stabilize at near-normal levels for that time of year thanks to good grain availability. However, as of January, following this auspicious period for the country as a whole between October and December, agropastoralists could begin to feel the effects of the diminished size of their herds, whose rebuilding will require more time, and of the previous extremely poor growing season.

Table I. Less likely events liable to change the scenarios described above in the next six months

Area	Event	Effects on food security conditions
Farming areas across the country	Poor progress of the 2010/11 rainy season	<ul style="list-style-type: none"> • Poor start-of-season conditions for the growing of crops • Hoarding of crops by farmers until reassured by the progress of the growing season

		<ul style="list-style-type: none"> • Speculation by grain traders • Grain shortages and rising prices • Poor household grain access, creating country-wide food insecurity problems
Northeastern pastoral and agropastoral areas	Poor progress of the 2010/11 rainy season	<ul style="list-style-type: none"> • Extension of the lean season for livestock • Losses of animals • New outbreaks of epizootic diseases • Unmanageable herd movements, with a high risk of theft and fighting among pastoralists and between farmers and pastoralists • Less demand and larger supplies of animals • Sharp drop in prices • Impairment of new pasture growth for the 2010/11 season • Pastoral and agropastoral households in the northern part of the country will face a third consecutive year of shortages of pasture and watering holes, making them extremely food-insecure.
	Unusual infestations of crop predators	<ul style="list-style-type: none"> • Destruction of crops and pasture • Poorer household grain availability • Pressure on grain markets • Poor grain availability will seriously affect the food security of households dependant on the market for their food supplies.
Northern pastoral areas	Sharp rise in civil security threats due to ethnic fighting	<ul style="list-style-type: none"> • Disruption of the supply networks for these population groups • Displacement of local residents to safer areas • Interference with coping strategies • Poorer food access • Rise in malnutrition rates, particularly for children • Further deterioration in the already weakened food security situation of these population groups