Mali Food Security Update — August 2013

The return of displaced populations and reopening of banks support economic recovery in the north

KEY MESSAGES

- The agropastoral season is progressing after a slight-to-moderately late start following poor rainfall conditions early in the season. With increased rainfall activity at the end of July, planting rates in most crop-producing areas are near average. In general, rainfall totals as of August 20th are normal to above-normal, except in Bamako and localized areas of Ségou and Koulikoro where slight deficits are observed.

- The reopening of banks is bolstering economic recovery in northern Mali. The return of approximately 140,000 IDPs and refugees since June (based on IOM data as of August) and the resumption of government and utility services mark the beginning of a return to more normal conditions in the north.

- Increased milk production and good terms of trade, at more than 15 percent above-average, have improved livelihood conditions for pastoralists emerging from the lean season, who are currently facing Stressed levels of food insecurity (IPC Phase 2). Price increases of 10 to 20 percent and the slow pick-up in economic activity in northern agropastoral areas still in the middle of the lean season are maintaining Stressed food security conditions (IPC Phase 2) in these areas.

CURRENT SITUATION

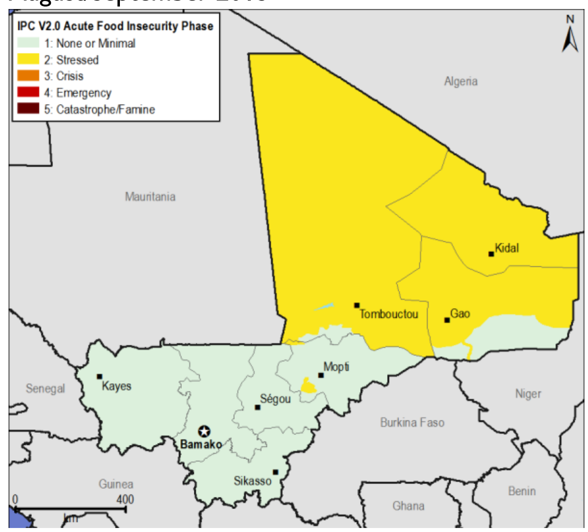
Nationwide overview

In general, seasonal progress continues to advance with the acceleration of beneficial rainfall since the beginning of August. Markets across the country are still well-stocked in spite of the seasonal tightening of locally grown cereal supplies.

Situation in southern Mali

- Good rainfall accumulation since late July has improved planting rates. Cropping activities for rainfed crops are practically completed and are still in-progress in rice-farming areas. According to the National Department of Agriculture planting rates are at least average. Continuing rainfall through October, forecasted in the climate outlook, should be sufficient to produce an average harvest in light of delays in normal planting that are expected to reduce yields and flooding that is likely to result in some localized crop losses.
- Heavy August rains caused significant damage to property and crops, particularly in Bamako, Kayes, Koulikoro, and Ségou.

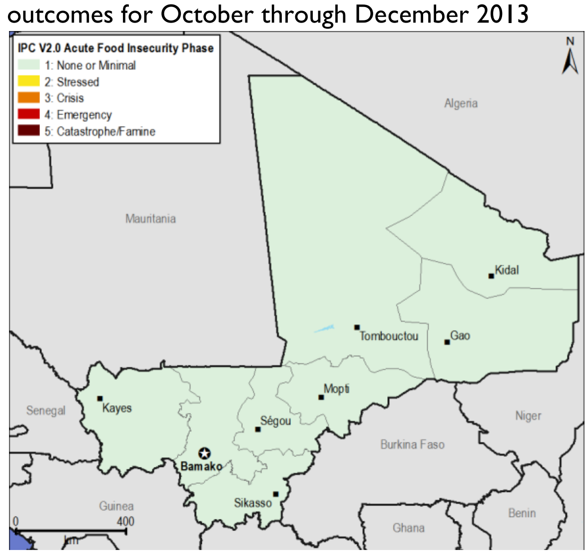
Figure 1 Current food security outcomes for August/September 2013



Source: *FEWS NET*

This map shows relevant current acute food insecurity outcomes for emergency decision-making. It does not necessary reflect chronic food insecurity.

Figure 2. Most likely estimated food security outcomes for October through December 2013



Source: *FEWS NET*

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Based on current rainfall rates and weather forecasts, the flooding risk continues, particularly in the southwestern reaches of the Kayes and Sikasso regions.

- Even with the seasonal tightening of supplies on production markets, prices are still more or less stable, with small and normal fluctuations of less than five percent in Bla and Bankass, for example, since last month. In general, retail prices for millet are stable, except on the Ségou, Bamako, and Mopti markets where prices are up from last month by eight percent, 11 percent, and 12 percent, respectively. These steeper than usual rises in prices since last month are a reflection of growing season conditions. They are also due, in part, to the ongoing procurements (4000 MT) by the OPAM (the National Produce Board) on these markets. Millet prices are approximately 10 percent above the five-year average, while sorghum prices are near-average or five to 16 percent below-average.
- Procurements of over 30,000 metric tons of cereal between now and the upcoming harvest for the replenishment of the national food security reserve are imminent, with financing from the Islamic Bank.
- The availability of fresh maize and lean season foods (pulses) and cash and in-kind wage payments for crop maintenance work are helping to maintain the food access of poor households between August and September. Earnings from farming activities and other regular seasonal activities are providing poor households with needed income to improve their market access.

Situation in northern Mali

- According to the crop calendar, the growing season in northern areas of the country is making normal progress. The planting of seedbeds for irrigated rice crops in village-level irrigation schemes along different branches of the Niger River has been slightly delayed by the low flood stage of the river. A number of partners distributed supplies of fertilizer, fuel, and local rice seeds to farmers in the Valley and improved varieties of seeds to farmers in irrigation schemes in July and August. At the very least, this assistance should help ensure an average production level.
- Current security conditions are contributing to the rebound in economic activity sustained by the return of an estimated 140,000 DPs since June, according to figures from the IOM. The reopening of banks in northern Mali should give new momentum to the economic recovery in that area. Reconstruction projects and farming activities are serving as important sources of income, particularly in urban areas.
- Cereal availability on area markets improved between July and August. The volume of cereal trade between the Koutiala/San/Bla cereal-producing areas and high-consumption areas in the north increased sharply from *554 MT* in June to *1,636 MT in July (according to the OMA, the Agricultural Market Watch), approaching the seasonal norm of 2000 MT*. Millet prices are unchanged from last month in Timbuktu and Kidal and approximately 10 percent higher in Gao, most likely, fueled by the growing local demand and demand in Niger, and are 13 percent above-average in Timbuktu and 19 percent above-average in Gao. In general, rice prices are also unchanged from last month, though Gao and Timbuktu are reporting drops in prices by approximately five percent and 15 percent, respectively. Increases in livestock prices to over 20 percent above-average, fueled by high domestic demand and demand in Niger, are improving the incomes of pastoralist households and giving them better market access. Terms of trade for livestock/cereal are more than 15 percent above-average and favoring pastoralists.

UPDATED ASSUMPTIONS

Current trends in food security indicators have not affected the assumptions made by FEWS NET in establishing the most likely food security scenario for the period from July through December 2013.

PROJECTED OUTLOOK THROUGH DECEMBER 2013

- With the stabilization of staple food prices on local markets, the availability of lean season foods (earth peas, cowpeas, and green corn), and the pursuit of seasonal activities, households in southern Mali should continue to experience Minimal food insecurity (IPC Phase 1). In addition to these factors, the usual available employment opportunities should help keep households food-secure between now and the main harvest season in October.

- Ongoing distributions of food rations to at-risk households, good terms of trade for livestock/cereal, and milk availability will continue to significantly improve food security among pastoralists. Ongoing farming activities in crop-producing areas through the month of September and harvests of flood-irrigated rice crops in lake areas of Timbuktu at the end of August will improve household food availability and food access between now and the main harvest of millet in interdune areas in September-October, and the main rice harvest in November. IPC Phase 2: Stress levels of acute food insecurity among poor households will gradually improve to Minimal food insecurity (IPC Phase 1) by October with the availability of wild plant foods and the first harvests of millet and rice crops.