FEWS NET
FAMINE EARLY WARNING SYSTEMS NETWORK

MALI Food Security Update Décembre 2020

Continued after-effects of insecurity and COVID-19 on households' livelihoods

KEY MESSAGES

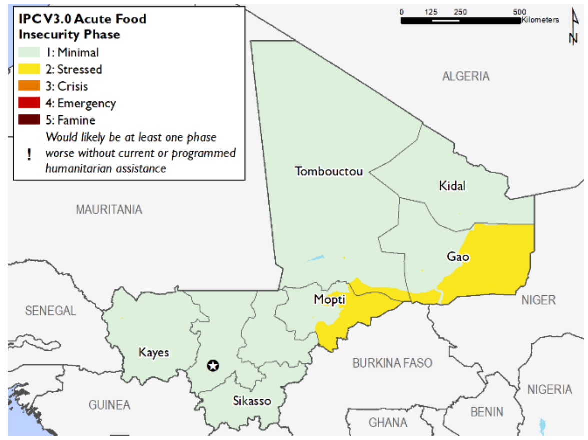
- The resurgence of positive COVID-19 cases has led to the resumption of certain restrictions, both in the country and in migrant-receiving countries. This is likely to reduce the incomes of households that depend on the affected sectors, particularly in urban centers.

- Current average-to-good cereal harvests in the country are about 19 percent higher than average (Planning and Statistics Unit of the Rural Development Sector [CPS/SDR]), which is favorable for an overall average availability in the country during the 2020 to 2021 food year. As a result, most households are at Minimal (IPC Phase 1) food insecurity for the period from December to May 2021.

- The seasonal increase in supply is observed in the markets despite the disruption of flows linked to ongoing insecurity in the central and northern areas of the country. The resulting seasonal decline, at a level near or below the average, favors average household food access.

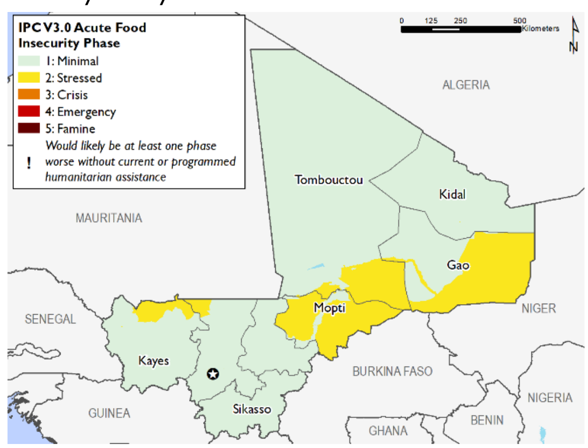
- The ongoing Stressed (IPC Phase 2) food insecurity in the Liptako Gourma region and some northern areas of the country will continue until May due to the after-effects of insecurity on livelihoods.

Map of projected most likely food security outcomes, December 2020 to January 2021



Source: *FEWS NET*

Map of projected most likely food security outcomes, February to May 2021



Source: *FEWS NET*

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CURRENT SITUATION

Security situation

Ongoing security incidents continue, particularly in the country's central and northern areas and in the northern portion of the Ségou region. Economic activities are disrupted by livestock theft, destruction of property, households' inability to access their fields in certain parts of the Office du Niger area, and market disruptions, increasing households' vulnerability to food insecurity. At the end of October, according to the Armed Conflict Location & Event Data Project (ACLED), the number of people killed in connection with insecurity stood at 4,645 compared to 2,866 people killed during 2019, a provisional increase of 62 percent. This demonstrates a clear deterioration of insecurity in the country, with more cases of people killed in the country's central (including northern Ségou) and northern areas. Challenges accessing basic social services, unusual population displacements estimated at 57,810 households resulting in 311,193 displaced persons at the end of October 2020, and difficulties for humanitarian access increase the vulnerability of poor households in these areas, especially in Liptako Gourma and parts of the Gao and Tombouctou regions.

COVID-19 situation

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COVID-19 cases have increased across the country since mid-November. As of December 10, 2020, the cumulative number of positive cases since the beginning of the crisis totals 5,814 cases, with 3,591 recoveries and 194 deaths. The district of Bamako and its surrounding areas remain the epicenter of the epidemic. The fatality rate is 3.3 percent. To limit the chain of infection, the government has reemphasized continued compliance with restrictions, reinforced application of preventive measures in public spaces and gathering places, reinforced epidemiological surveillance through mass testing, routine testing and contact tracing, testing of travelers entering Mali without a negative COVID-19 PCR certificate, banned gatherings of more than 50 people, and rotated staff in public services. According to the National Strategy for Food and Nutrition Security (NSAN) in September 2020, nearly 10 percent of households surveyed across the country reported a decline in their income due to the effects of COVID-19, with a significant proportion in migrant remittance-related areas and some urban centers in the country such as Bamako and its surrounding areas, including Kati and Koulikoro.

Seasonal progress

Average-to-good harvests continue in the country, particularly for rice alongside the river. Cereal production is about 19 percent higher than the five-year average overall, according to the Planning and Statistics Unit of the Rural Development Sector (CPS/SDR). Despite this overall production, pockets of localized decline are reported in the cercles of Koro, Bankass, and Bandiagara, and in northern parts of the country due to insecurity that has limited agricultural activities, as well as in the Niger River valley following the floods. Additionally, a decline of more than 70 percent in cotton production compared to the five-year average due to the effects of COVID on the purchase prices is likely to limit the availability of animal feed this year during the pastoral lean season. Changes in the off-seasons for market gardening continue with an average-to-good outlook thanks to good water availability in dams, ponds, and reservoirs. The same is true for flood recession crops around the lakes in the Tombouctou, Mopti, and Kayes regions.

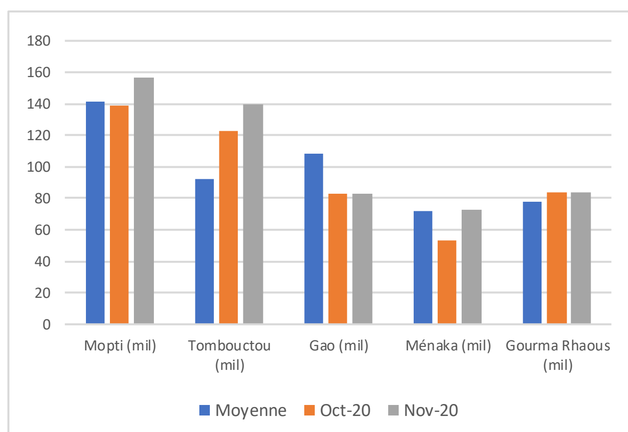
Pastoral conditions

Biomass production and the filling of watering holes are satisfactory overall and globally better than average, which is favorable for an average pastoral lean season, particularly in the pastoral areas. A normal return of migratory herds to permanent watering holes and crop residues has been observed. However, accessibility challenges for certain routes due to insecurity continue to be reported, particularly in the Liptako Gourma area. The animal health situation is generally calm and the vaccination campaign continues with the support of humanitarian partners such as the International Committee of the Red Cross (ICRC) and the FAO. Animals' physical condition is satisfactory with average milk production, which is favorable for pastoral households' food consumption and income from selling milk and by-products such as butter and cheese.

Market and prices

The seasonal increase in the supply of cereals and legumes is noted in various markets thanks to new harvests in progress and destocking by farmers. The overall supply remains adequate across the country. The seasonal decline in cereal prices continues in various markets with less magnitude compared to other years due to retention of stocks while awaiting institutional requirements. At the end of November, prices of the main cereals in the main reference markets were down overall compared to the month before. Compared to the five-year average, the price of the main cereal in regional capital markets is up 15 percent in Kayes (sorghum), 7 percent in Sikasso (maize), 6 percent in Ségou (millet), 10 percent in Gao (millet), and 25 percent in Ménaka (millet). Meanwhile, prices are down 2 percent in Mopti (millet), 2 percent in Tombouctou (millet), and 4 percent in Koulikoro (millet). These price levels are generally conducive to an average household access to food products. Livestock markets are generally functioning normally except in the insecure areas where disruptions persist. In general, prices are average to higher than the five-year average. Terms of trade for goat/millet compared to the five-year average are similar in Ménaka (+1 percent), up 8 percent in Rharous, 11 percent in Mopti, and 51 percent in Tombouctou, which is generally favorable for herder households' market access, except in Gao where a 23 percent decline is observed.

Figure 1. Term of trade (kg) in selected major markets of the country from October to November 2020



Source: *FEWS NET*

Floods

Foods affected 90,237 people (11,958 households) across the country with significant material damage, loss of livelihoods, and 21 deaths (National Social Development Agency [DNDS]). The degradation of livelihoods, particularly for poor households, reduces the ability of the estimated 11,958 households to adequately meet their food and non-food requirements due to the effects of the floods. However, these floods have positive effects on the ongoing market gardening production in the flooded area of Mopti and on the Dogon Plateau.

UPDATED ASSUMPTIONS

The current situation has not significantly affected the assumptions used by FEWS NET in establishing the most likely scenario for the period from June 2020 to January 2021. However, it could experience changes related to the continued precariousness of the COVID-19 situation in Mali. Within this framework, the following assumption has been developed.

Impact of COVID-19: Considering the rising number of COVID-19 cases, COVID-19 restrictions will remain in force throughout the scenario. These restrictions, which limit the movement of people and goods, will have a negative impact on economic activities, but to a lesser extent than during the first wave in March 2020.

Developments in the socio-political situation: The political situation is relatively calm thanks to the establishment of transitional bodies in accordance with recommendations from the Economic Community of West African States (ECOWAS). However, social discontent with strikes that are beginning and expected political uprisings could lead to disruptions in the socio-economic climate in a situation already marked by COVID resurgence.

PROJECTED OUTLOOK TO MAY 2021

For the country’s poor agropastoral households, their own production serves as the main source of staple foods during the harvest and threshing season. This harvest availability allows them average food access and also to earn average income from cereal sales. Price levels of basic foods below or near the five-year average will allow poor households average food access during the post-harvest period. As a result, the current Minimal (IPC Phase 1) food insecurity will continue until the end of May 2020.

In Liptako Gourma and some northern areas of the country, poor households are reducing their reliance on atypical coping strategies and dependence on humanitarian assistance due to harvest availability. Continued insecurity will negatively impact livelihoods, especially for poor households and displaced persons. Households in Liptako Gourma are expected to continue to be Stressed (IPC Phase 2) until May 2021.

In the western Sahel, poor households are reducing their reliance on atypical coping strategies and dependence on humanitarian assistance due to harvest availability. Price levels of basic foods below or near the five-year average will allow poor households average food access during the post-harvest period. The resurgence of COVID-19 in migrant-receiving countries will continue to negatively impact migrant remittances, limiting households’ ability to satisfy their non-food needs. Minimal (IPC Phase 1) food insecurity experienced by poor households during the period from December 2020 to January 2021 will escalate to Stressed (IPC Phase 2) starting in February 2021, which is expected to continue until May 2021.

ABOUT THIS REPORT
This food security update covers current conditions as well as changes to the projected outlook for food insecurity in this country. It updates the FEWS NET Food Security Outlook, which is published three times a year. Learn more about our work here.