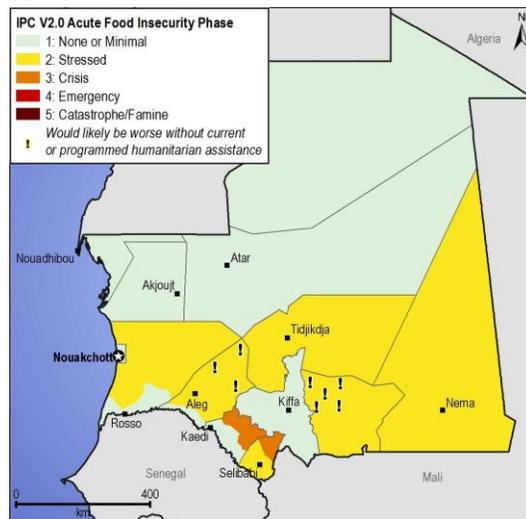


*Food security conditions are expected to improve in light of seasonal forecasts*

**KEY MESSAGES**

- Poor households in the west of the Rainfed cultivation Zone (in northern Guidimakha) and southwestern areas of the Agropastoral Zone (in northern and eastern Gorgol) are still in Crisis (IPC Phase 3). With their heavy market dependency and extremely low seasonal incomes, they are facing an especially harsh lean season and are having difficulty meeting their basic food needs.
- The growing flow of cereal from Mali, the jump-starting of farming activities in late July, and the improvement in pastoral conditions should strengthen the food security situation of poor households between August and September, with the exception of households in western areas of the Agropastoral zone, which will remain in Crisis (IPC Phase 3).
- As of the end of September, there will be Minimal acute food insecurity (IPC Phase 1) in all livelihood zones with the exception of certain pastoral and flood-recession farming areas, where conditions will remain Stressed (IPC Phase 2). This improvement in food security conditions will take more time in pastoral areas and the Senegal River Valley due to their dependence on flood recession crops.

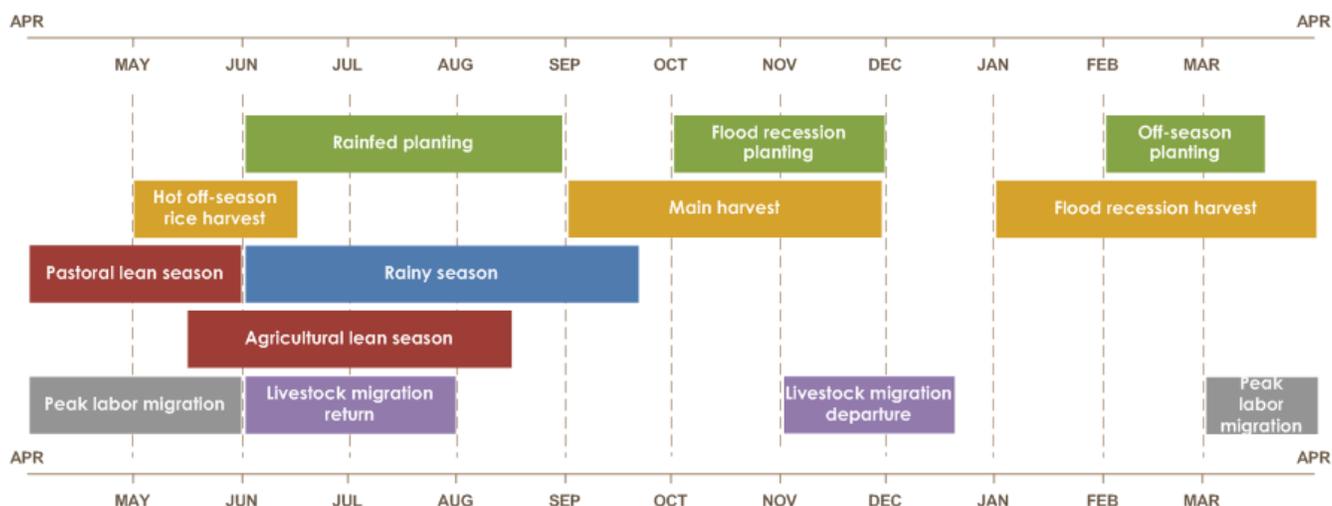
Current estimated food security outcomes, July 2014



Source: FEWS NET

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

**SEASONAL CALENDAR FOR A TYPICAL YEAR**



Source: FEWS NET

**NATIONAL OVERVIEW**

*Current situation*

**Rainfall conditions:** There were heavy rains in the southern part of the country between the last week of June and the first week of July, signaling the start of the rainy season, which normally gets underway in early July. However, this fact notwithstanding, cumulative seasonal rainfall totals are still well below the five-year average, except in the southwestern reaches of the country (in southern Hodh Ech Chargui and Hodh Echargui) (Figure 1).

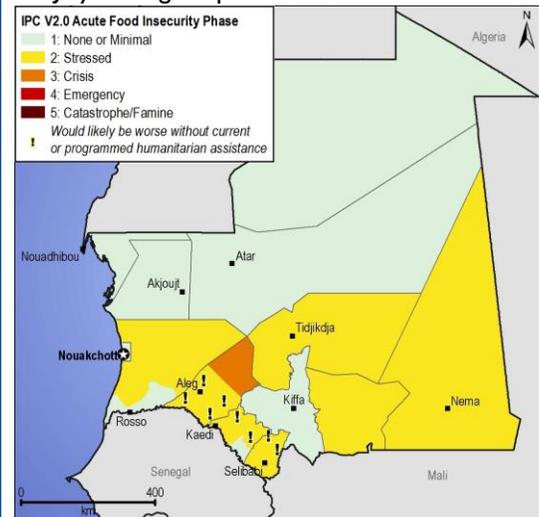
**Crop-growing conditions:** There were good yields of hot off-season rice crops (harvested in May/June), providing food stocks for poor households in the southwestern part of the Senegal River Valley and allowing agricultural entrepreneurs to supply domestic markets with locally-grown rice.

Wet-planting activities have started up in most parts of the Rainfed cultivation Zone, where crops were already being dry-planted since the middle of June according to local farming practices. Based on historical data showing planting periods extending from the third dekad of June to the second dekad of July, current crop planting activities are in line with the normal crop calendar. However, at present, with the large seasonal rainfall deficit compared with the five-year average and the limited availability of farm labor (with many seasonal migrant workers still not back), the size of the area planted in crops by this point in the season is well below-average and government targets. Farmers are relying mostly on cereal crops sold on the market for their seeds.

The rainfed rice-growing season beginning in June in the Senegal River Valley and western Agropastoral Zone (M’Bout Department) is progressing normally. The timely provision of farm credit and inputs and the government incentives (debt forgiveness and the free supply of fertilizer for village-level irrigation schemes) have effectively revitalized rice-farming activities. Thus, there is good cause to expect government targets for the growing of 45,000 hectares of irrigated crops to be met (including 28,000 hectares of rainfed rice and 17,000 hectares of hot off-season rice crops).

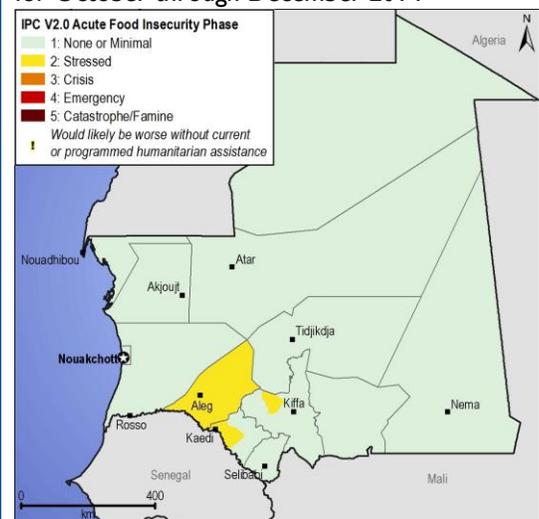
**Pastoral conditions:** NDVI (Normalized Difference Vegetation Index) imagery for the first three weeks of July shows no traces of vegetation except in southern Guidimakha and Assaba. Elsewhere, the condition of vegetation is visibly poorer than usual for this time of year (Figure 2). The rains caused dry pastures to rot, but have not yet given rise to any new green pasture growth. As a result, prices for animal feed in pastoral areas are rising (with prices on the Timbédra market in Hodh Echargui up by 32 percent from May). On the other hand, with the rains filling canals, seasonal lakes and ponds, and other depressions, pastoralists are having less difficulty gaining access to water for their livestock. There are no reports of outbreaks of any epizootic diseases anywhere in the country. The unusual presence of pastoralists the Pastoral transhumance and Pastoral and trading Zones in the Senegal River Valley area at this time of year in search of rice straw from the harvest of hot off-season rice crops is a potential threat to current crops.

Most likely estimated food security outcomes for July through September 2014



Source: FEWS NET

Most likely estimated food security outcomes for October through December 2014



Source: FEWS NET

These maps show relevant acute food insecurity outcomes for emergency decision-making. They do not necessarily reflect chronic food insecurity.

**Seasonal incomes:** The seasonal incomes of poor households across the country are still well below-average due to the limited supply of work, except in the western reaches of the Senegal River Valley (in southern Trarza), where hot off-season farming activities have generated above-average levels of income for many poor households. With many seasonal migrant workers still not back, there should be a high demand for farm labor once the rains pick up (towards the first dekad of August), translating into a daily wage of over 2,000 MRO and a six-day work week, as was the case in 2008. The earlier than usual departure of transhumant herds from pastoral areas has limited the use of local pastoral labor since February. Poor households in oasis areas are still earning regular wages, but demand for unskilled labor is restricted to areas in the heart of the desert. The stream of Income from date production is drying up with the end of the date-growing season. Poor household incomes from these activities are near-average but falling with the end of the harvest and the slowdown in ancillary activities during the month-long observance of Ramadan.

**Markets and prices:** Retail markets are still well-stocked with imported staple foods (rice, wheat, sugar, and oil), but prices are on the rise due to the speculation during the month of Ramadan when rice, oil, sugar, and milk are in high demand. Prices for sorghum (the staple food of choice) are down from May of this year by 7.8 percent in the Rainfed cultivation Zone with the rebound in cross-border trade with Mali, 6.25 percent in the Oasis and wadis Zone, and five percent in the Agropastoral Zone, and are unchanged in the Senegal River Valley.

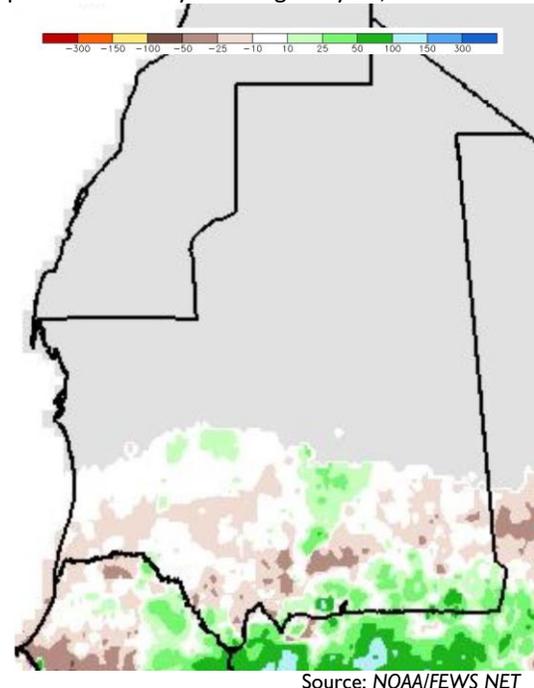
Sorghum prices in the Senegal River Valley and Agropastoral Zone are well above figures for June of last year by 14.5 percent and 11 percent, respectively. Prices are relatively stable in rainfed farming areas and are still above the five-year average in the Oasis and wadis Zone.

Prices for livestock are up from last month by more than 21 percent in all livelihood zones with the exception of the Agropastoral Zone, which reported a 26.4 percent decline in prices. Price levels are significantly above figures for the same time last year and the five-year average by 44 percent in rainfed farming areas to as much as 76 percent in the Oasis and wadis Zone. This price behavior is due, in part, to the interplay of high demand for the celebration of the end of Ramadan and the sharply reduced supply of animals with the departure of transhumant herds, greatly amplified by the speculative practices of traders.

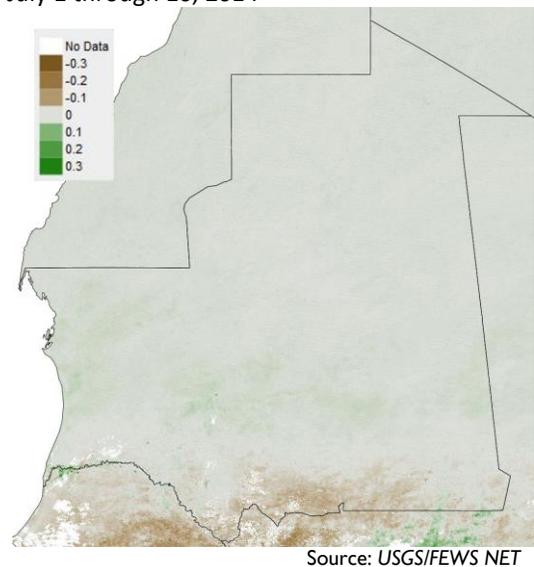
Terms of trade for sheep/cereals are still in favor of pastoralists. Price ratios for sheep/rice in the Senegal River Valley Zone have been more or less stable since last month, but are up by 27 percent from the same time last year and by even more compared with the five-year average. The pattern is the same in the other livelihood zones. Terms of trade for sheep/cereals on the Abdel Bagrou market in Rainfed cultivation Zone in June of this year were up by 25.3 percent from May and 49 percent from June of last year and were 46 percent above the five-year average.

Price ratios in the Agropastoral Zone are up from May by only eight percent and down by 26.4 percent from the same time last year. This is attributable to the combined effects of the higher prices of sorghum and wheat and lower prices of livestock due to the poor physical condition of animals and of competition with supplies from the Rainfed cultivation Zone, where transhumant herd movements have created a surplus, filling markets in major cities. Even so, terms of trade for livestock are still 19 percent above the five-year average.

**Figure 1.** Rainfall anomalies (mm/dekad) for the period from May 1 through July 21, 2014



**Figure 2.** NDVI anomalies for the period from July 1 through 10, 2014



Prices for an average sheep and two-year-old bull calf on the Adel Bagrou market in the Rainfed cultivation Zone are still above the five-year average. The downward trend in prices with the arrival of transhumant herds is reversing itself with their departure for inland areas of Mali.

#### *Assumptions*

The most likely nationwide food security scenario for the period from July through December 2014 is based on the following general assumptions:

- In spite of the reported moderate rainfall deficits in early July, current forecasts are predicting normal rainy season conditions for the rest of the season. This would help allow for the timely pursuit of farming and pastoral activities by poor households according to normal crop and livestock calendars.
- Poor households will succeed in obtaining seeds from cereal crops sold on the market for household consumption, but they will be of poor quality.
- There will be higher than usual levels of rice production, surpassing the five-year average. Debt forgiveness, the timely provision of farm credit and inputs, including free supplies of fertilizer, and the distribution of plowing equipment have motivated independent rice farmers and farmers in irrigation collectives, to the point that the size of cropped areas has already surpassed figures for the same time last year and the five-year average.
- The expected normal rainfall conditions and availability of farm inputs should translate into average levels of rainfed cereal production, with harvests of short-cycle crops in September and long-cycle crops in October/November. Current shortfalls in the size of cropped areas should quickly be made up with the expected pick-up in rainfall activity as of August.
- Based on the outlook for average levels of rainfall, with a normal stocking rate, pastoral conditions should meet livestock needs between now and December.
- Animal reproduction rates will be below-average on account of the degraded condition of pastures last year. However, there should be more or less sufficient milk production for household consumption between August and December.
- There will be continuing shortfalls in short-term seasonal labor migration income through August, with migrant workers expected to return home sometime between the end of July and August.
- Except for the trickle of return migration in July, in general, the farm labor force will return to the countryside to work the land as soon as the rains pick up. Migrants will start returning in August.
- Poor households will generate average to above-average levels of wage income from farm labor between August and December in both irrigated farming areas (with the large expansion in cropping areas) and rainfed farming areas (with the high probability of an adequate supply of farm labor). With the relatively late return of seasonal migrant workers, there should be a high demand for farm labor, translating into a daily wage of over 2,000 MROs and a six-day work week, as was the case in 2008.
- There will be average levels of wage income from pastoral activities. Even with the restoration of more or less good pastoral conditions, there will still be little demand for casual labor, with most of the pastoral workforce consisting of herders paid by the month or season.
- Water levels in flood-recession farming areas (lowland, dam, and *walo* areas) between August and September will allow for the farming of all serviceable areas.

#### **Market behavior and price trends:**

- There will be a boost in cross-border trade in staple cereal crops as of August with the anticipated improvement in rainfall conditions after the end of July expected to encourage Malian farmers to unload their cereal stocks in order to buy livestock. This should cause livestock prices to quickly rally and improve market supplies of sorghum in rainfed farming and southeastern agropastoral areas as of July.
- The slowdown in trade in local Senegalese rice and staple cereals (millet, sorghum, and maize) in the Senegal River Valley area is expected to continue into November. There will be a stable if not growing volume of Senegalese re-exports of Asian rice through December. There will also be a larger than average volume of re-exports of imported oil, sugar, flour, pasta products, etc. to Mali, Senegal, and the southern Maghreb in all border areas.
- There are reportedly good market supplies, with markets in rainfed farming areas starting to get shipments of staple cereal crops from Mali. In line with seasonal trends, prices are expected to come down slightly with the recent revitalization of cross-border markets and pick-up in business in government-subsidized shops (*boutiques de solidarité*), whose regular flow of supplies is frequently disrupted by shipping problems during the rainy season, caused by the rains.

*Most likely food security outcome*

The lean season for poor households in the west of the Agropastoral Zone (Brakna, northern Gorgol, and western Assaba) is unusually severe due to the combined effects of the large shortfalls in household production and poor pastoral conditions. Both of these problems are attributable to last year's erratic rainfall and the unexpected, earlier than usual presence of transhumant domestic and Senegalese herds. In addition to making changes in their eating habits (replacing sorghum and rice consumption with wheat and pasta products), they have cut back their food intake and their number of meals (generally skipping the evening meal). In spite of the assistance furnished by the government, the WFP, and a number of NGOs, they currently and will continue to face Crisis (IPC Phase 3) conditions between July and September, with continuing food consumption deficits. Less affected by shortfalls in cereal and pasture production, conditions in the rest of this Agropastoral Zone will remain Stressed (IPC Phase 2) during this same period, with poor households still experiencing livelihood protection deficits. With the limited rainfed farming areas in this area between July and September and most livestock away (in seasonal grazing areas farther south), conditions are not expected to improve until September with the return of livestock herds and the spin-off effects of harvests of short-cycle crops in neighboring rainfed farming areas.

The continuing Crisis (IPC Phase 3) conditions in the northwestern reaches of the Rainfed cultivation Zone (in northern Guidimakha) will begin to ease as of August, with poor households starting to generate income (from farm labor), allowing them to purchase food supplies from government-subsidized shops (boutiques de solidarité) and village-level food security reserve (SAVS) programs or to regain the trust of creditors lending against or paid back by work or from future harvests. These households will see a gradual easing of their food insecurity between now and the September harvests to Stressed (IPC Phase 2). As usual, with the November harvest, they are expected to experience Minimal (IPC Phase 1) acute food insecurity between November and December.

Poor households in other parts of the country will continue to experience Minimal (IPC Phase 1) acute food insecurity with near-normal levels of food consumption and the positive effects of assistance programs by the government and food security actors such as government-subsidized shops, village-level food security reserve programs, and CREMAMs (outpatient therapeutic feeding centers).

**AREAS OF CONCERN****Western Livelihood Zone 9 – Rainfed cultivation**

This area includes northern Sélibaby Department and all of Ould Yengé Department, where roughly 75 percent of local farmers are poor, with only one harvest of rainfed crops per year providing 35 percent of their yearly food supply and whose sale accounts for 20 percent of their annual income. Thus, they are highly vulnerable to rainfall shocks impacting their farming activities. Their main livelihood and coping strategy is short-term seasonal labor migration, which is the source of approximately 20 percent of their annual income and is largely responsible for maintaining their food access on local markets, particularly between May and July.

*Current situation*

- Poor households have been market-dependent for their entire food supply since March. Their cereal stocks have been depleted for several months on account of the failure of flood recession crops, which are their main source of cereals.
- According to reports by field missions and information from various resource people, markets are well-stocked with imported foodstuffs.
- Despite high domestic demand (for household consumption and seeds), the usually large flow of seasonal trade in staple cereal crops with Mali at this time of year is still well below-average.
- There was an atypical seasonal rise in staple cereal prices between January and February of this year, which have since stabilized with the large availability of substitute cereals (primarily wheat) distributed free of charge or sold in government-subsidized shops and by village-level food security reserve programs.
- Though many households have more members off working as seasonal migrant laborers, there are large shortfalls in seasonal income (half the normal amount in certain areas) generated largely by short-term seasonal labor migration with the limited supply of seasonal jobs in neighboring areas of Mali. Local activities (construction, domestic work, etc.) have also been scaled back (to less than 30 percent of average levels).

- Though steadily deteriorating, pastoral conditions are still satisfactory in spite of the mass presence of transhumant domestic and Senegalese herds (except in northern Guidimakha).
- Livestock markets are well-stocked with animals from sales by local and transhumant pastoralists. This has created an above-average seasonal supply of livestock, triggering an atypical decline in livestock prices, which usually rise at this time of year.
- Global acute malnutrition rates as of last December were under 10 percent across-the-board. However, based on trends in July of last year, rates for this July are expected to go up. Assistance programs such as government-subsidized shops, CRENAMs (out-patient therapeutic feeding centers), and school meal programs are functioning normally, selling food at prices 30 to 40 percent below market prices.

### *Assumptions*

The most likely local food security scenario described below for the period from July through December 2014 is based on the following general assumptions:

- Markets will be well-stocked with staple cereals (sorghum, millet, and maize) from the pick-up in cross-border trade with Mali and with imported foods from a regular, adequate volume of imports until, at least, December. Encouraged by the progress of the growing season, Malian farmers will clear out their inventories and sell off their crops in order to buy livestock.
- In the absence of any further demand for seeds, sorghum prices will start to come down as of the end of July, in line with the volume and rate of trade with Mali.
- Poor households will need to continue to purchase their food supplies until the upcoming September harvests. Staple cereal prices, on the rise up until July, driven by demand for seeds, will come down between July and December.
- Based on the expected normal start of the rainy season across the country, crop-growing and pastoral activities should go according to schedule based on the average crop calendar. The local workforce, currently engaged in short-term seasonal labor migration, will return to farm the land by the end of July or the beginning of August at the latest. Though still rather limited as of mid-July, there will be average to slightly above-average levels of income generation by poor households from farm labor with the pick-up in rainfall activity as of August, encouraging middle-income and better-off households to farm larger areas.
- Pastoral conditions will start to meet the needs of local livestock by the end of July, though transhumant livestock herds will not return to the area until after the end of September. Pastoralists a long way from their home bases (in many cases, in Mali) will generally wait for their animals to be strong enough to make the return journey. In such case, more often than not, they will delay their return trip until the (September) harvests of early crops. Though there will be limited milk production throughout the outlook period, it should at least suffice to meet the food needs of poor households between September and December.
- In line with seasonal trends, prices for livestock will rebound as of August with the improvement in pastoral conditions. The expected decline in staple cereal prices (sorghum, millet, and maize) with the likelihood of Malian farmers clearing out their inventories should significantly improve terms of trade (livestock/cereals) for local households.
- The seasonal decline in the price of wheat will improve the access of poor households to this substitute foodstuff.
- Government-subsidized shops, village-level food security reserve programs, and CRENAM programs will remain operational through the end of December.
- The refugee situation will remain stable and will not affect farming and pastoral activities in the southeastern reaches of this livelihood zone.

### *Most likely food security outcome*

Crisis (IPC Phase 3) faced by poor households in northern Guidimakha experiencing survival deficits in spite of ongoing assistance programs will ease, giving way to Stressed (IPC Phase 2) acute food security between July and September. These households will still need to purchase their food supplies in the face of their well-below-average seasonal incomes. This will put them at risk for livelihood protection deficits through the end of September. Not until the harvesting of long-cycle crops, which account for over 75 percent of their annual crop production, will they experience Minimal (Phase 1) acute food insecurity between October and December.

### Western Livelihood Zone 7 – Agropastoral

This area includes northern and eastern Gorgol, northern Brakna, and central-western Assaba. Roughly 60 percent of the population consists of poor, farming-oriented, agropastoral households. On average, household crop production meets 30 percent of their food needs and crop sales provide 20 percent of their income. They purchase 35 percent of their food supplies between March and July, usually with short-term seasonal labor migration income, and on credit from local traders. These loans are repaid in kind at harvest times when terms are most advantageous.

#### *Current situation*

- The degraded pastures in the southwestern and southern reaches of this livelihood zone in July will gradually recover with the first seasonal rains.
- There was an atypical reliance on boreholes charging for the watering of livestock in early July (with fees ranging from 15 to 50 MRO per head of cattle and from 10 to 20 MRO per small animal).
- Poor households were buying animal feed at price ranging from 3800 to 6200 MRO for a 50 kg sack and wheat selling for 120 to 140 MRO/kg until the end of July. These figures are only slightly above the five-year average due to the sharp hikes in prices in 2010 and 2011 when crop and pasture production deficits fueled demand for these products.
- Average seasonal milk availability is limited all across this livelihood zone due to shortages of pastoral resources.
- Poor households have no food stocks due to the failure of flood recession crops between November of last year and February of this year on account of the use of poor-quality seeds, stalk borer infestations, and the heavy pressure from grain-eating birds on the small areas in which crops reached the maturation stage.
- Due to last year's large shortfalls in cereal production in both countries, there is a well-below-average volume of cross-border trade in staple cereal crops with Mali and Senegal, which is the normal source of supply for this area during the lean season.
- There is very little domestic trade in locally-grown cereal crops due to last year's shortfalls in local crop production, most of which goes to markets in local capitals.
- Markets are well-stocked with substitute cereals (wheat and rice) and imported foodstuffs.
- There are well-below-average levels of seasonal income from local labor with the slowdown in local activities, which revolve mainly around the processing of harvested crops.
- Short-term seasonal migration income is down with the return of migrant workers from host countries offering fewer than usual job opportunities.
- Staple food prices have been above the five-year average since the beginning of the year due, in part, to shipping problems during the rainy season.
- The atypical seasonal decline in prices for livestock (between July and August) is due to the poor physical condition of animals. This has weakened terms of trade compared with previous months which, though still in favor of pastoralists, are forcing them to sell more livestock.
- Government-subsidized shops are functioning normally and village-level food security reserve programs are being regularly restocked.

#### *Assumptions*

The most likely local food security scenario described below for the period from July through December 2014 is based on the following general assumptions:

- Markets will be well-stocked, at least until December. Sorghum and wheat prices will steadily climb, fueled by the high demand engendered by poor local cereal production. Trends in the pattern of international trade should stabilize prices for other imported foodstuffs.
- Assistance programs such as government-subsidized shops, village-level food security reserve programs, CRENAMs, and cash transfer programs will continue to run smoothly. So far, the government, the WFP, and implementing NGOs have not reported any constraints affecting their operation.
- In line with seasonal trends, the previous steady erosion in terms of trade for livestock/cereals will reverse itself between now and the end of September with the improvement in pastoral conditions and harvests of short-cycle crops limiting reliance on food purchasing and credit sales.
- Though getting off to a slightly late start, there will be normal rainy season conditions, with normal farming activities and average incomes, which should improve household food access.

- Farm workers engaged in short-term seasonal labor migration will begin returning in July, according to trends in rainy season conditions, devoting themselves to farm work which, minimally, should generate average levels of wage income with the expected normal start-of-season and regular demand for farm labor.
- As of July, the improvement in pastoral conditions with expected average to below-average levels of rainfall will help strengthen the availability of milk, which is a dietary staple in this area. By August, there will be surface watering holes for pastoralists. With the availability of pasture for livestock, purchases of animal feed will cease between August and December.
- As of August, Malian farmers will begin to unload more of their crops, which will help improve staple cereal availability and seed access.
- There will be normal recourse to arrangements for the purchasing of food on credit against future income and harvests between July and September.
- Market supply systems will be disrupted between July and October by the combined effects of rising fuel prices and road closures during the rainy season, holding up deliveries. This is expected to trigger an extremely sharp upward movement in food prices (>40 percent) until the maturation of crops in late August, further aggravated by the usual speculation during the lean season (through the end of August), making it that much more difficult for poor households to maintain access to a regular, adequate food supply between June and the beginning of August.

#### *Most likely food security outcome*

Poor households in northern and eastern Gorgol (Monguel and M'Bout Departments), northern Brakna (Magta Lahjar Department), and localized areas of Assaba (southwestern Kiffa Department and northwestern Kankossa Department) are starting to experience survival deficits. After selling more livestock to maintain their food access on local markets with annual household cereal production meeting their food needs only between February and March, they are no longer able to maintain a proper regular diet in spite of the food assistance they are receiving from the government and various food security actors. Nevertheless, the current Crisis (IPC Phase 3) conditions will begin to ease, giving way to Stressed (IPC Phase 2) acute food security between August and September with the improvement in pastoral conditions and income from farm labor. There will be no further improvement until October through December, when area households will experience Minimal food insecurity (IPC Phase 1) as the initial positive effects of short-cycle crops are reinforced by harvests of long-cycle crops and large incomes from farm labor in flood recession farming areas (depression, dam, and *walo* areas of Gorgol) and ancillary activities for rainfed crops (threshing, winnowing, grinding, etc.).

## EVENTS THAT COULD CHANGE THE OUTLOOK

**Table 1:** Possible events in the next six months that could change the outlook

Area	Event	Impact on food security conditions
Nationwide	Atypical rise in international market prices for wheat and rice	Steep rise in food prices (including sorghum and millet prices), curtailing the food access of poor households
	Long-term disruption in cross-border trade	Steady rise in staple cereal prices, driving up prices for substitute cereals (wheat and rice)
	Poor temporal distribution of rainfall, causing crops and pastures to wither	<ul style="list-style-type: none"> <li>Planting failures and withering of crops</li> <li>Drying of pastures and delay in return migration by transhumant herds</li> <li>Limited seasonal income from farm labor with the reduced demand for labor</li> </ul>
	Locust infestation	This would affect crop, animal, and wild plant production across the country.
	Termination of assistance programs before upcoming harvests	High likelihood of hikes in food prices, severely limiting the food access of poor households
Agropastoral livelihood zone 7 and livelihood zone 9 (rainfed cultivation)	Long period of transhumance due to the late start of the rainy season or erratic pattern of rainfall, limiting new pasture growth	Below-average incomes for poor households engaged in pastoral activities (in the event of an extended period of transhumance)
	Additional assistance programs for poor households	Improvement in their food availability and less pressure on their livestock
Livelihood zone 9 (rainfed cultivation)	New flare up and expansion of the crisis in Mali	New influx of refugees, destabilizing markets Security problems affecting cross-border trade and farming and pastoral activities in the southeastern part of the country

## About scenario development

To project food security outcomes, FEWS NET develops a set of assumptions about likely events, their effects, and the probable responses of various actors. FEWS NET analyzes these assumptions in the context of current conditions and local livelihoods to arrive at a most likely scenario for the coming six months. Learn more [here](#).