

## **MALI MONTHLY FOOD SECURITY UPDATE: November 25, 2000**

*Average cereal production is expected in Mali due to unfavorable late-season weather conditions.*

### **Summary**

Meteorological conditions during the last two dekads of October were characterized by a stationary high-pressure system over North Africa, resulting in an early retreat of moist air south of the Mopti latitude (about 15° N) during the period. Subsequently, most of the country's agricultural zones experienced a significant decrease of storm activities and rainfall, just as in mid-September. These dry spells worsened the impact of deficit rainfall recorded since mid-September in some areas, the most affected of which are Mopti and Gao Regions.

CILSS and FAO carried out a joint mission to estimate the 2000/01 cereals harvest estimation in Mali from October 23 through 26. The main objectives of the mission were to evaluate the performance of the agricultural season, estimate cereal production for 2000/01, and to collect and analyze relevant data on the 1999/00 cereals consumption year to prepare the national food balance sheet for 2000/01. Total preliminary cereal production for 2000/01 is estimated at 2,386,296 MT, about 17.5% less than last year's final record level of 2,893,608 MT, but very close to the past five-year average.

In summary, the agricultural season 2000/01 will not be as good as the previous two seasons, but food security will be satisfactory in the country overall, thanks to sizeable reserves that have been stored over two years. However, considering the variability of weather patterns during the season, there is a threat of localized food insecurity in several regions, especially Mopti, Gao, Kidal and Timbuktu, and the northern part of Ségou. Despite slight increases in cereal prices in most consumer markets, average millet prices during November 2000 were still lower than their post-devaluation average and also lower than prices during the past 4 years. Moreover, markets need to be closely monitored as staple food prices will likely increase later this year, in view of the expected decline in crop production and more particularly, the drop in crop production in neighboring countries, such as Burkina Faso and Niger.

### **1. Agroclimatic Conditions**

Meteorological conditions during the last two dekads of October were characterized by a stationary high-pressure system over North Africa, resulting in an early retreat of moist air south of the Mopti latitude (about 15° N) during the period. Subsequently, most of the country's agricultural zones experienced a significant decrease of storm activities and rainfall, just as in mid-September. These dry spells worsened the impact of deficit rainfall recorded since mid-September in some areas, the most affected of which are Mopti and Gao Regions.

Overall, Mali received near-average volumes of rainfall. As a consequence, seasonal cresting of all rivers in October 2000 was less than last year's levels and than seasonal averages.

Cumulative rainfall deficits caused significant crop losses, especially in Mopti, Gao and Timbuktu Regions. For the entire country, about 227,000 hectares of all crops were lost due to interrupted rainfall during the sowing period as well as the uncertain start of the season in the

cotton production zones. The strike by cotton growers (FEWS NET *Monthly Report* for August) led some farmers to sow smaller areas to cereals than normal.

By November, first-sown millet and sorghum and rainfed rice were at the maturation stage. Suna millet and maize have been harvested. Lowland and irrigated rice crops are between the heading out and maturing stages. The vegetative status of crops is average to good, depending on the location.

Swarms of grain eating birds (*Quelea quelea*) in the Office du Niger zone of Ségou region and in Mopti, Gao and Timbuktu Regions pose a major threat for the end of the agricultural season. Indeed, since September, these areas have become important breeding grounds for these birds. Minor damage of off-season rice has been reported. However, plant protection is partly under control overall due to adequate treatment. Timely application of pesticides by plant protection squads of the National Plant Protection Service (SNPV) limited the damage caused by grasshoppers, Spanish flies and rats. Small numbers of locusts were seen in early September and during October between Tessalit (northern Mali) and the Algerian border. However, these locusts do not represent a serious threat at this time of the year and, for now, remain far from agricultural areas.

Presently, grazing is satisfactory south of the 14th parallel while it is less abundant and has started drying in northern Regions of Timbuktu, Gao and Kidal. The availability of *bourgou*, a grass growing in the interior delta of the Niger River that attracts millions of livestock each year, is poorer than that last year due to insufficient River levels this year. Water points along grazing tracks in the north are already drying up. Cattle concentrations can be seen in Gao Region. Cattle breeding and health is satisfactory, thanks to preventive health measures taken by the specialized services of the National Directorate of Support to Rural Areas (DNAMR) of the Ministry of Rural development and the regular practice of private veterinarians who have been operating there for the past three consecutive agricultural seasons.

## **2. Preliminary Estimate of Cereal Production**

CILSS and FAO carried out a joint mission to estimate the 2000/01 cereals harvest estimation in Mali from October 23 through 26. The main objectives of the mission were to evaluate the performance of the agricultural season, estimate cereal production for 2000/01 and to collect and analyze relevant data on the 1999/00 cereals consumption year (November–October) to prepare the national food balance sheet for 2000/01.

The mission worked in close collaboration with different national services concerned with following up on the agricultural, especially DNAMR, the National Directorate of Statistics and Computer Processing (DNSI), and the National Directorate of Meteorology (DNM). The mission also met with different national and international agencies concerned with monitoring the food situation and the management of food aid programs in order to collect information for the preparation of 2000/01 preliminary harvest assessment report. These agencies included Agrhymet/GTPA, the Market Information System (OMA), the Early Warning System (SAP), USAID/FEWS-NET, FAO and WFP. The mission expressed its appreciation for the high quality of agricultural season monitoring reports regularly prepared by the various technical services and early warning systems.

Total preliminary total cereal production for 2000/01 is estimated at 2,386,296 MT, about 17.5% less than last year's final record level of 2,893,608 MT, but very close to the past five-year average (Table 1).

**Table 1: Preliminary Cereal Production in Mali for 2000/01 Compared to Production in 1999/2000 and Average Production in 1995-1999**

Cereals	Estimated Production 2000/01	Production 1999/2000	Variation (2000/01 as % of 1999/2000)	Average 1995-1999	Variation (2000/01 as % of Average)
Coarse Grains	1,630,925	2,158,883	-24.5%	1,767,339	-8.0%
Rice	745,100	727,140	2.5%	624,847	19.0%
Wheat/Barley	10,271	7,585	35.0%	5,243	96.0%
<b>Total</b>	<b>2,386,296</b>	<b>2,893,608</b>	<b>7.5%</b>	<b>2,397,429</b>	<b>-0.5%</b>

Source: DNSI/DNAMR/CPS

The production of coarse grains (millet, sorghum, maize and fonio) will be more affected than other crops, about 24.5% less than last year's level and 8% less than the recent five-year average. Millet production will decrease 2% compared to production last year but will increase 8% above average.

On the other hand, sorghum and maize production will decrease by 14.5% and 64.0%, respectively, compared to 1999/2000, and by 5.0% and 42.0%, respectively, compared to average. This sharp drop in maize production was quite unexpected, even allowing for the exceptional production level achieved last year. Indeed, maize remained cheap all year long and major stocks are still held at the farm level (about 100,000 MT), mostly in the main production areas of Koulikoro and Sikasso Regions (17,000 and 76,000 MT, respectively).

In contrast, overall rice production increased 2.5% and 19.0%, compared to 1999/2000 and average, respectively. The increase in rice production is essentially due to continued improvements in the performance of the higher-inputs modern sector, where rice production increased 6.0% over production last year, whereas performance of the traditional sector fell about 13% short, due to unfavorable rainfall.

The National Security Stock (SNS) amounted to 34,889 MT of millet and sorghum as of late October, essentially its maximum amount (35,000 MT). In view of the shortfall in coarse grain production this year, it would be appropriate to import about 25,000 MT that could be mobilized from the financial reserve funds (*fonds de contre-partie*), also at their peak level.

Adding all these different stock levels plus stocks held by traders, village associations and cereal banks reach a total close to 600,000 MT. This volume corresponds to more than three-months of consumption, a guarantee of reliable food availability ? and hence, food security ? at the national level.

The food situation during the marketing year 1999/2000 (November-October) was satisfactory due to good cereal production recorded in the country during the two previous seasons. There were no food shortfalls at the national level. Markets were well supplied and prices remained generally stable and noticeably less than those of previous years. Prices were so low, due to record availabilities and glut of supplies, that it was not possible to sell off old grain stocks from

the National Security Stock to make room for the new. Out of 10,000 MT of cereals for sale, for which the sales prices was set slightly above the market price, only 11 MT were sold.

### **3. Vulnerable Areas**

In summary, the agricultural season 2000/01 will not be as good as the previous two years, but food security will be satisfactory in the country overall, thanks to sizeable reserves that have been stored over two years. However, considering the variability of weather patterns during the season, there is a threat of localized food insecurity in several regions, especially the northern part of Ségou, Mopti, Timbuktu, Kidal and Gao.

Moreover, markets need to be closely followed as prices are likely to experience upward pressures later this year, given the expected reduction in the cereal harvest, and particularly the drop in the harvest in neighboring countries, such as Burkina Faso. It is reasonable to expect sizeable price increases later in the marketing year, as early as March and continuing until the next harvest one year from now. However, such price increases will be beneficial to producers with reserves to sell as producers were seriously affected by very low prices this year.

Food security conditions in the vulnerable areas (Mopti, Gao, Kidal and Timbuktu, and the northern part of Ségou Regions) unless appropriate steps are taken immediately to increase the availability of off-season crops. For example, the government plans to launch a program in December to promote off-season activities (vegetable gardening, water recession cultivation and a second rice crop) in the Office du Niger.

Cattle producers may also constitute a risky group due to a predictable deterioration later in the year of the cattle-cereals terms of trade. Grazing lands are becoming scarcer in the north, which may result in an increase in market supplies of livestock, while coarse grain prices should increase due to a production decrease. The unsettled political situation in Cote d'Ivoire may also have an impact on export cattle markets, and thereby on prices.

The National Early Warning System (SAP) is preparing the preliminary report on the Food Situation and Vulnerability Assessment (FEWS NET is participating in this Assessment). FEWS NET will closely monitor any areas that will be classified as highly food insecure. This Assessment will recommend actions to mitigate the impact of food insecurity.