FAMINE EARLY WARNING SYSTEM NETWORK ◆
RESEAU DE SYSTEME D'ALERTE PRECOCE CONTRE LA FAMINE ◆
MALI BAMAKO S/C USAID BP 34 MALI

MALI MONTHLY FOOD SECURITY REPORT
November 21–December 20, 2000
December 25, 2000

Summary

Farmers in Mali are stepping up their harvest of rain-fed cereals (millet, sorghum and rice), following the earlier harvests of "hungry season" crops (maize, *souna* millet, fonio, niebé and *wandzou*).

Cereal production prospects remain average overall, estimated at nearly 2.3 million MT for the 2000/01 production year. The net cereals balance calculated in November 2000 by CILSS/AGRHYMET shows a deficit of 147,700 MT of cereals, comprised of 5,500 MT of rice, 200 MT of wheat and 142,400 MT of coarse grains (millet, sorghum, fonio and maize). On this basis, the annual per capita availability of 210 kg reflects a slight decrease (4%) in the per capita availability in 1999/2000. However, availability this year is above the official consumption rate of 204 kg per person per year. Despite this cereal deficit, food security prospects look satisfactory overall for the year 2001.

The National Early Warning System (SAP) covers 173 arrondissements (or 348 communes) north of the 14th parallel in Kayes, Koulikoro, Mopti, Tombouctou, Gao and Kidal Regions. During its preliminary expert forecasting meeting in November, SAP classified nearly 200,000 persons as facing "food difficulties" (highly vulnerable to food insecurity) and nearly 450,000 others as facing "economic difficulties" (moderately vulnerable). (Note that the SAP definitions do not directly correspond to FEWS NET terms.)

In all the communes where people are at risk of "food difficulties" and/or "economic difficulties," SAP recommends that local institutions, organizations and development partners start or strengthen income generating activities (such as gardening, animal feeding, poultry breeding, fish breeding and small trade) that will improve the food access of these groups. SAP also recommends that organizations and partners pay priority attention to the particular needs of vulnerable groups (children under 5 years, women in general and the elderly). SAP highly recommends that partners support school-feeding programs in Mopti, Tombouctou, Gao and Kidal Regions.

Effective measures need to be taken for alleviating food insecurity of the 200,000 people in food difficulty between now and March 2001 (when the off-season crop harvest can be estimated). If not, SAP will have to recommend the distribution of nearly 5,000 MT of free food aid to cover their food needs for the three months beginning in April, after conducting its final round for the annual vulnerability assessment.

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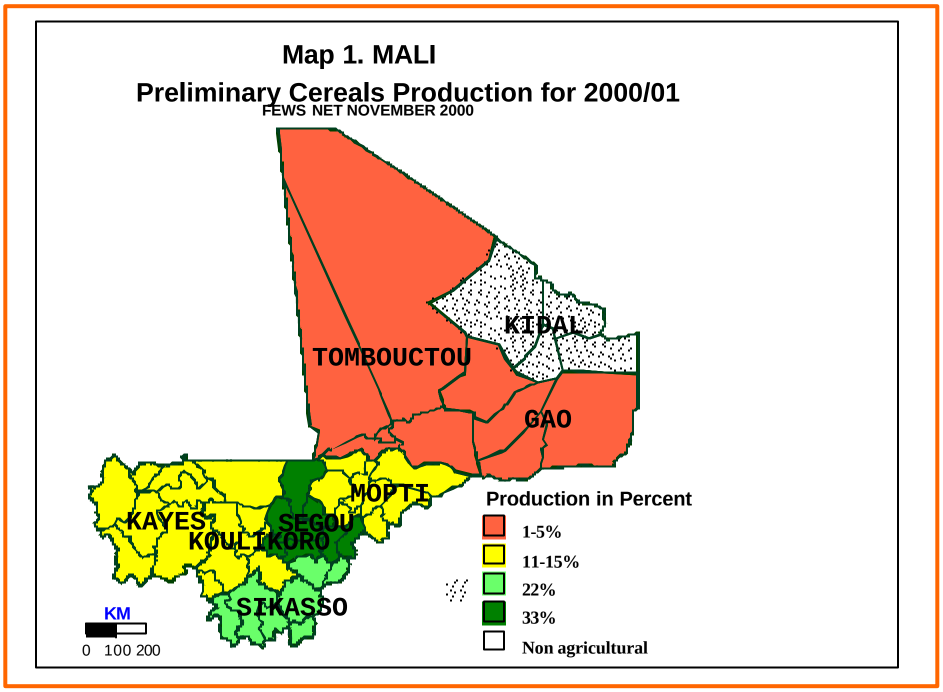
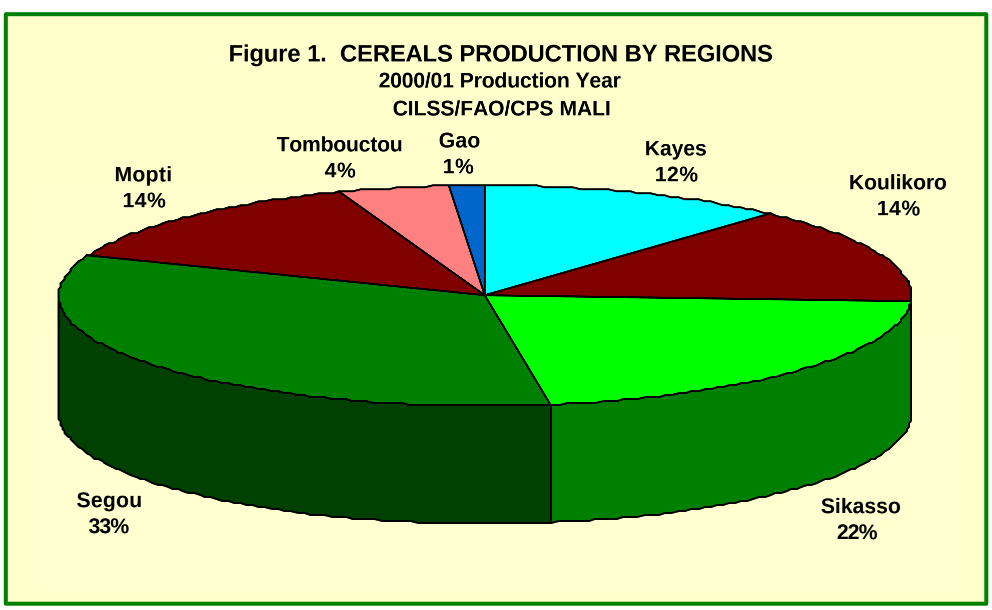
1. Agricultural Production by Region

Farmers in Mali are stepping up their harvest of rain-fed cereals (millet, sorghum and rice), following the earlier harvests of "hungry season" crops (maize, *souna* millet, fonio, niebé and *wandzou*). Cereal production prospects remain average overall, estimated at nearly 2.3 million MT for the 2000/01 production year.



This level is thus less than last year's record of 2.8 million MT by 17.5%, but very close to the average of the last five years (CILSS/FAO/CPS Mali; see November 25 FEWS NET/Mali Food Security Update). Traditionally, the most productive region is Ségou located at the center of the country, followed by Sikasso, located in the south (Map 1). During the 2000/01 agricultural year, Ségou's share of the total cereal production represented nearly 33% (Figure 1).



2. Food Security Outlook

With an average cereal production of nearly 2.3 million MT, food security prospects look satisfactory for Mali for 2000/01. In fact, the anticipated total cereal availability (net production and stocks) before considering imports is estimated at well over 2.1 million MT compared to estimated national consumption needs of more than 2.3 million MT. On that basis, the preliminary gross cereal balance (before imports and exports) shows a gross deficit of 172,000 MT comprised of 15,500 MT of rice, 107,400 MT of coarse grains (millet, sorghum, maize and fonio) and 25,000 MT of wheat (Table 1).

Table 1: 2000/01 Provisional Cereal Balance Sheet for Mali

	RICE	WHEAT	COARSE GRAINS	TOTAL
POPULATION as of 30/04/2001				**10 451 000**
Consumption norm (kg/person/year)	46.5	5.3	152.0	**204.0**
1. AVAILABILITY	488 300	13 500	1 671 200	**2 173 000**
Production				
Gross production	745 100	10 300	1 631 000	**2 386 400**
Available production	462 700	8 700	1 386 300	**1 857 700**
Initial Stocks	25 600	4 800	284 900	**315 300**
On-farm stocks	400	-	240 300	**240 700**
Other stocks	25 200	4 800	44 600	**74 600**
2. NEEDS	503 800	63 300	1 778 600	**2 345 700**
Total human consumption	485 900	55 600	1,588 600	**2 130 100**
Final sStocks	17 900	7 700	190 000	**215 600**
On-farm stocks	3000	-	154 000	**157 000**
Other stocks	14 900	7 700	36 000	**58 000**
3. GROSS SURPLUS(+) DEFICIT(-)	(15 500)	(49 800)	(107 000)	**(172 000)**
4. IMPORT-EXPORT BALANCE	10 000	50 000	(35 000)	**25 000**
Anticipated commercial imports	60 000	50 000	-	**110 000**
Anticipated food aid	-	-	-	**-**
Anticipated exports	50 000	-	35 000	**85 000**
5. NET SURPLUS (+) DEFICIT(-)	(5 500)	200	(142 400)	**(147 700)**
6. PER CAPITA AVAILABILITY (Kg/year)	**48**	**6**	**157**	**210**

Source: adapted from CILSS/AGRYMET, November 21, 2000

Mali expects to import 50,000 MT of wheat and 60,000 MT of rice, and export 50,000 MT tons of rice and 35,000 MT of coarse grains. This gives net imports of 25,000 MT of cereals. After yaking into account exports and imports, the net cereal balance sheet shows a net deficit of 147,700 MT of cereals, broken down as 5,500 MT of rice, 200 MT of wheat and 142,400 MT of coarse grains. The estimated per capita availability of 210 kg represents a slight decrease (4%) compared to 1999/2000. However, it remains above the official cereal consumption rate of 204 kg/person/year. Overall, food prospects for 2000/01 look satisfactory. Local food deficits could be met by normal market transactions between surplus and deficit areas, and by limited food aid actions.

During its preliminary expert forecasting meeting held November 6-15, the National Early Warning System (SAP) carried out a preliminary analysis of food availability in the 348 communes (formerly 173 arrondissements) that it covers. It was clear from this analysis that the cereal harvest of the 2000/01 production year will fall below that of last year and slightly below the five-year average in certain areas of SAP zone north of the 14th parallel. The anticipated cereal harvest of the 2000/01 season can be summarized as follows, by region and circle:

- Kayes Region: average in the Circles of Yélimané, Kayes, Diéma and Nioro;
- Koulikoro Region: average in Banamba, Nara and Kolokani Circles;
- Ségou Region: good in Niono and Macian, average in Ségou Circles;
- Mopti Region: relatively good in Bankass, Djenné, Koro and a part of Mopti Circles, poor in several areas of Bandiagara, Douentza, Youvarou, Ténénkou, Mopti and Koro Circles;
- Tomboutou Region: generally average in Diré, Goundam, Tombouctou and Gourma-Rharous Circles and from poor to very poor in several areas in the communes of Niafunké;
- Gao Region: average in Ansongo and Bourem Circles and relatively poor in Ménaka and Gao Circles.

In addition to the decrease in local cereal production in SAP's area of coverage, the 2000/01 marketing year will be characterized, among other factors, by:

- the decrease in wild food harvests, especially *fonio sauvage* in Gao and Tombouctou Regions;
- a decrease in national production compared to the 1999/2000 production year; and
- the slight decrease in agricultural production in neighboring countries, particularly Burkina Faso, according to data from the Regional Agrhymet Center in Niamey, Niger.

In fact, the regional socio-economic context is not very conducive to certain income generating activities, which could lead to:

- a decline in cash income coming from the trade of livestock products and market gardening; and
- decreasing cash income from migration (seasonal and long term) due to socio-economic troubles in the sub-region, particularly in Cote d'Ivoire and Guinea.

In that context, cereal prices are expected to increase as the marketing year evolves. On the other hand, price increases could be advantageous to certain producers who have had two consecutive years of very good production but with low prices that have not let increase their incomes. For the time being, one of the unusual factors mitigating or moderating food insecurity in the country is the significant volume of on-farm stocks, community or trader stocks which, once released on the market, could delay expected price increases.

Based on the analysis of these factors and specific coping measures being taken by populations in response to a drop in agricultural and/or money income, the SAP forecasting meeting classified the 173 arrondissements (or 348 communes) it monitors into three food risk groups:

- those facing “food difficulties” (or highly vulnerable to food insecurity);
- those facing “economic difficulties” (or moderately vulnerable to food insecurity), and
- those with “nothing to mention” (whose food security conditions are satisfactory).

It is noteworthy that no arrondissements fell into the fourth, “food crisis,” category. (Note that the SAP definitions do not directly correspond to FEWS NET terms.)

Based on available information, about 450,000 persons are likely to fall into less worrisome "economic difficulties" during the next hungry period (*soudure*). These groups are also located in Mopti, Tombouctou, Gao and Kidal Regions (Map 2 and Table 2). These numbers could change, depending on the evolution of food availability indicators, cash income and the price of food commodities.

Table 2. Communes At Risk of "Economic Difficulties"

Regions	Circles	Arrondissements	Communes
Kayes	Kayes	Diamou	Diamou
	Yélimané	Kirané	Kirané Kaniaka
			Krémis
Koulikoro	Kolokani	Didiéni	Didiéni
			Sagabala
Mopti	Mopti	Korientzé	Koronbona
		Sendégué	Ourebe-Doudé
	Bandiagara	Bandiagara central	Soroly
			Dandoly Doucoumbo
		Dourou	Dourou
			Pélou
		Kani-Gogouna	Wadouba
		Kendié	Kendié
			Dogany-Béré
			Borko
			Kendé
		Sangha	Sangha
	Bankass	Baye	Baye
	Douentza	Douentza central	Tédié
			Dianweli Maoundé
			Dalla
			Kéréna
			Koubéwel Koundia
			Débéré
			Petaka
			Gandamia
			Korarou
	Ténenkou	Ténenkou central	Diaka
			Ouro-Guiré
			Ouro-Ardo
			Sougoulbé
		Diondiori	Diondiori
		Toguéré-Coumbé	Toguéré-Coumbé
	Youvarou	Ambiri	Dirma
			Dongo
		Guidio-Saré	Déboye (innondée)
Tombouctou	Gourma Rharous	Aglal	Lafia (vallée)
		Bambara Maoundé	Bambara Maoundé
	Niafunké	Haribomo	Haribomo
		Banikane	Banikane Narhawa
		Saraféré	Fitounga
Gao	Gao	Gao central	Sony Aliber
			Gounzoureye
	Ansongo	N'Tillit	N'Tillit
		Ansongo central	Ansongo
		Talataye	Talataye
			Tin Essako
			Abiyou
			Inesserine
Kidal	Kidal	Kidal central	Kidal
		Essouk	Essouk
	Abéibara	Tinzaouatène	Tinzaouatène
	Tessalit	Tessalit central	Tessalit
		Aguel Hoc	Adjelhoc
		Tin-Kar	Timtaghène
	Tin Essako	Tin Essako central	
		Abiyou	
		Inesserine	

Source: SAP

The likelihood of encountering “food difficulties” remains very high for about 200,000 persons in Mopti, Tombouctou, Gao and Kidal Regions (Table 3 and Map 3).

Table 3: Communes at Risk of “Food Difficulties”

Region	**Circle**	**Arrondissement**	**Communes**
Mopti	Douentza	Boré N’Gouma	Dangol-Boré Djaptodji
	Youvarou	Youvarou-central Gathi-Loumou	Youvarou Farimaké
Tombouctou	Niafunké	Koumaira Léré N’Gorkou	Koumaira Léré N’Gorkou
Gao	Gao	Djébock Haoussa-Foulane	Anchawadj Gabero
	Ansongo	Ansongo-central	Bara
	Bourem	Almoustarat	Tarkint
	Ménaka	Anderaboukane	Anderaboukane
Kidal	Kidal	Annéfis	Annefif
	Abéibara	Abéibara-central Bouréissa	Abéibara Boghassa

Source: SAP, November 2000

SAP will be in a position after the off-season harvest, but no later than March 2001, to issue its final assessment of food security status of people in the zones it covers. Meanwhile, SAP will continue to monitor its array of food security indicators.

Elsewhere, in SAP areas, most of the population ? some 4 million people ? expects sufficient agricultural and/or cash income giving them relatively easy access to food commodities during the 2000/01 marketing year. Their food security status will be satisfactory overall.

3. Recommended Actions

In all the arrondissements (communes) where people are at risk of "food difficulties" and/or "economic difficulties," SAP recommends that local institutions, organizations and development partners start or strengthen income generating activities (such as gardening, animal feeding, poultry breeding, fish breeding and small trade) in order to improve the food access of these groups.

It also recommends that organizations and partners pay priority attention to the particular needs of vulnerable groups (children under 5 years, women in general and the elderly). SAP highly recommends that partners support school-feeding programs in Mopti, Tombouctou, Gao and Kidal Regions.

Strengthening of cereal bank programs, cereal shops, cooperatives or granaries would be a good alternative for reducing food access difficulties during the hungry period.

In Kidal, Gao, Tombouctou and Mopti Regions, the majority of people affected by food insecurity during 2001 are herders or agro-pastoralists. For that reason, the SAP recommends that development partners or the populations themselves quickly initiate livestock de-stocking activities in order to buy cereal supplies before (or in case) prices soar. These destocking activities will be monitored through the implementation of a system of improved supplies of livestock food (sales of livestock food around water points or concentrations of livestock).

Effective measures for alleviating food insecurity must be taken between now and March 2001, when the off-season crop harvest can be estimated, for the 200,000 people who will themselves in "food difficulty" during the hungry period. If not, SAP will have to recommend the distribution of nearly 5,000 MT of free food aid to these people to cover their food needs for the three months beginning in April after SAP conducts its final round for the annual vulnerability assessment.

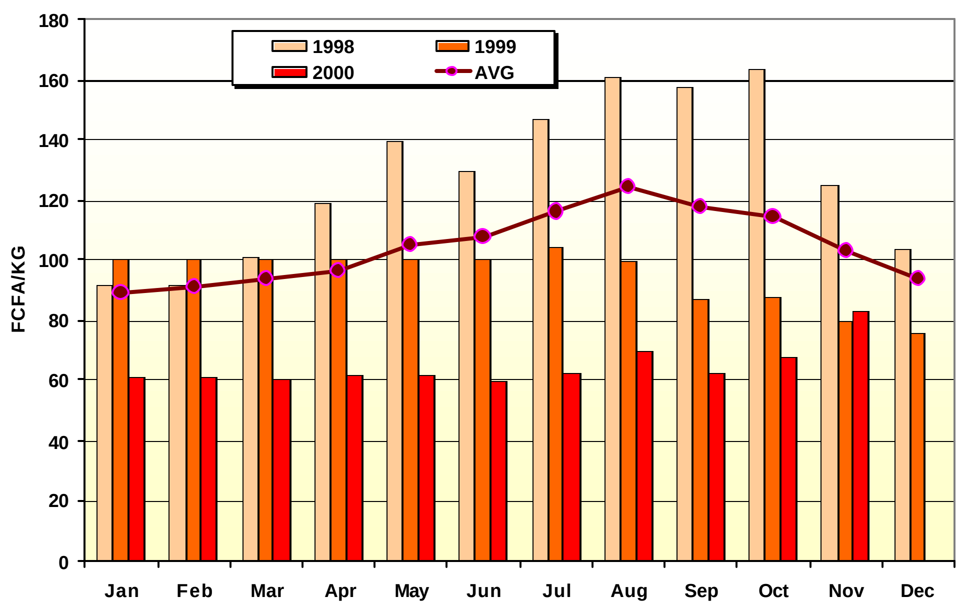
For the implementation of the recommended actions with regard to the 2000/01 marketing year, the Coordination Committee of the Food Security System (COC/SSA) of the Cereal Market Restructuring Program (PRMC) will organize a national meeting in December 2000 with the different groups in order to coordinate efforts. The first of its kind by the organizer, this meeting will be an opportunity for the PRMC and others, like the World Food Program, the German Cooperaton Agency (GTZ/KFW) through the "Mali-Nord" Program, World Vision International, Care International, Freedom from Hunger, German Agro-Action, Save the Children UK, and others, as well as local NGOs, to consult with one another in order to efficiently allocate the various activities that aim at reducing food insecurity and at the same time fight against poverty north of the 14th parallel in Mali..

4. Markets

Prospects for an average harvest during the 2000/01 marketing year are reflected in an early increase in cereal prices. Usually, prices tend to be low during the harvest and post-harvest period (October-January). However, this year starting in September – when it first looked like Mali would harvest an average crop – prices began to rise. The month of Ramdan, when Muslims fast from dawn till dusk (this year from November 27 to December 26) is a period of high cereal consumption, particularly millet, to sustain those fasting through the long day. This consumption pattern also puts upward pressure on prices. Currently, all the projections indicate that cereal prices will rise during 2001 due to the generally average harvest in Mali and the below-average harvests of neighboring countries, particularly Burkina Faso.

At the end of November, the average price for millet on the Ségou market ? the main production area of the country ? had increased by 18% compared to October. The average price of millet in November in Ségou was slightly more than (4%) that of last year when Mali harvested a second record crop. Despite the current rise of millet price on the markets of Ségou, it remains lower (24%) than the average price of the last five years, 1995-1999 (Figure 2).

Figure 2. AVERAGE MILLET PRICES in SEGOU



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Source: OMA