Headlines

- Cereal prices have fallen slightly during the quarter, but would normally be expected to fall more steeply in anticipation of a good harvest. Possible reasons why prices have not fallen more include: a shortage of agricultural labour, traders choosing to store cereals in the face of high inflation, and late rains depressing yields.

- Border markets in West Darfur that are dependent on Chad for their cereal supplies have been negatively affected by the Chadian authorities banning the movement of cereals across the border.

- Unusually, sheep prices peaked in many markets a month before *Eid Aladhi*, in September rather than October in 2012. Geneina market recorded the highest cattle prices in the quarter, mainly because the flow of cattle to Geneina was stopped by the flowing of Wadi Kaja.

- Groundnuts is one of the few cash crops still being produced and marketed in West Darfur, in traditional production areas such as Misterei. In contrast, very little sesame is available in West Darfur’s main markets, indicating a serious fall in production.

- There has been a general rise in commodity prices during the quarter, partly because of inflation but also because of disruption to the major trade routes in West Darfur.

Background and methodology

The goal of this community-based market monitoring initiative is to deepen analysis and understanding of the shifting patterns of trade and markets in Darfur, on an ongoing basis for key agricultural and livestock commodities, to identify how livelihoods and the economy can be supported through trade, and to identify peacebuilding opportunities through trade. Five CBOs plus DRA are monitoring 11 markets across West Darfur, including two markets in IDP camps, on a weekly basis. Quantitative data, for example the price of Darfur’s main cereals, livestock, cash crops and fruits and vegetables are collected weekly as well as qualitative data, for example on sources of supply. Some data are collected on a monthly basis, for example transport costs, transport routes and the impact of the conflict on flows of commodities. DRA holds quarterly analysis workshops with the CBO enumerators.

Participating CBOs and the markets they monitor

- El Massar Organization for Nomad Development and Environment Conservation (MONEC) [El Geneina, Kerenik and Habila]
- Pioneers of Peace and Development Organization (PPDO) [Mornei and Kirinding IDP camp]
- Community Development Association (CDA) [Foro Baranga and Kondobe]
- Beida Organization for Relief and Development (BORD) [Beida and Misterei]
- Sarabeel Organization for Services and Development (SOSD) [Kulbus]
- Darfur Development and Reconstruction Agency (DRA) [El Geneina and Sisi IDP camp]

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Cereals

This quarter of September to November 2012 coincides with the time of the cereal harvest in West Darfur. Millet is mainly cultivated in the north and northeast of the state eg Kulbous and Kereinik. In the south and southwest of the state sorghum is mainly cultivated and consumed. Production levels this season are better than last season, especially in Kulbus and Kereinik in the north and north-east of the state. Cereal prices have been stable during the quarter, or have fallen slightly in nominal terms although in real terms they have fallen more taking inflation into account: 46.5% in November 2012\(^1\). See Figures 1 and 2. A sharper fall in cereal prices would normally be expected when a good harvest is anticipated. Possible reasons why cereal prices have not fallen more include: a shortage of people engaged in agriculture, partly because the large number of IDPs in camps have limited access to farming, also artisanal gold mining has drawn people away from agriculture, and labour migration has resumed to Libya. The late rains this season also slowed down the weeding phase and may negatively affect yields. Other factors that may be impeding the fall in cereal prices include: traders choosing to store cereals as inflation soars, and damage to the crop from quelea birds in some areas like Mornei.

In Foro Baranga and Misterei markets the price of millet rose by 17% and 16% respectively in November 2012. These are cash crop production areas (especially groundnuts), which mostly depend on supplies of cereals from Chad. However, the Chadian authorities have banned the movement of cereals across the border into Sudan, thus pushing the price up in these markets.

It is harder to trace a consistent pattern in the price of food aid sorghum across markets as one of the main factors affecting price is the timing of food aid distributions in different areas. See Figure 3.

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\(^{1}\) Source: Federal Ministry of Finance and Economy
Livestock

This quarter coincided with *Eid Aladhi* when there is peak demand for sheep in the market and prices usually soar. As Figure 4 demonstrates, sheep prices peaked in many markets in September rather than October, the month of *Eid Aladhi*. The reasons seem to be large numbers of sheep brought to the market by livestock owners in October, in order to raise cash to meet their *Eid* requirements, but many livestock traders had left the market early for the *Eid* holiday. Thus, prices fell in October although increased again in many markets in November.

For cattle, Geneina market reported the highest average price during the quarter. See Figure 5. One of the reasons appears to be the fall in cattle supplies during the quarter from Foro Boranga and from Chad because of the trade route being blocked by the flow of Wadi Kaja. Geneina is also an area of high meat consumption. In Foro Baranga market the locality authorities have set the price of meat at SDG 18 per kg. This appears to have stabilized the price of cattle; it is the only market in West Darfur that has taken this action.

No trade in camels for export was reported in any of the monitored markets in West Darfur. This is because camel herds were moved north, a reflection of the good rains and therefore good northerly pastures.

The price of donkeys and horses peaked during the agricultural season in June/July. See Figure 6.
Cash Crops

Surprisingly, the price of groundnuts in the main market of Geneina is very similar to the market price in areas of production, for example in Misterei. See Figure 7. In Kereinik, another area of groundnut production, the groundnut price has actually been higher than the price in Geneina in some months. The reasons for this deserve further investigation, including the extent to which traders are storing groundnuts in areas of production. Overall, the price of groundnuts has fallen in recent months, since August 2012 in Geneina, as a promising groundnut harvest is anticipated. See Figure 8. In Masterei, for example, a larger area has been planted to groundnuts this year compared with last.

Very few of the markets monitored in West Darfur have reported availability of sesame. The markets where sesame is available are: Geneina, Habila, Kirinding (in just one month of the quarter), and Foro Boranga. See Figure 9. None of the other seven markets that the project is monitoring reported availability of sesame. Sesame cultivation carries high risks. Not only is it vulnerable to pests, it must be harvested within a short time period (usually a week) when it reaches maturity, which means that it is a conflict-sensitive crop.

The price of cash crops such as dry tomatoes, dry okra and garlic have mostly fallen slightly during the quarter, following normal seasonal trends, with some exceptions. See Figure 10. Both dry tomatoes and dry okra come from Jabal Mara in Central Darfur state to the markets of West Darfur.
Natural Resources

As the rainy season finished late, no dry grass for animal fodder was reported in any of the monitored markets in West Darfur. However, firewood prices rose in a number of markets. See Figure 13. This is to be expected at this time of year as those who normally collect and sell firewood engage in agricultural activities and agricultural labouring instead. The price of firewood in some markets is very low: this may reflect the quality of the firewood. Ease of access to firewood, in turn related to insecurity, is another factor affecting the price.

Figure 13: Price of firewood in monitored markets in West Darfur, September to November 2012

Transportation: Access and Costs

Most of West Darfur’s major trade routes have been disrupted during the last quarter, for various reasons:

1. The Nyala/ Geneina trade route is one of the most important trade routes in West Darfur: all imported commodities from Khartoum to West Darfur are transported along this route and most commodities exported from West Darfur to other states in Sudan also use this route. Insecurity, poor road conditions and trucks having to move in large convoys have all caused delays on this route during the quarter, resulting in increased commodity prices.

2. The Foro Baranga/ Habil/ Geneina trade route is mainly used for livestock, particularly for trekking cattle on the hoof to Geneina market. This costs SDG 30 per head of cattle and SDG 10 per head of sheep/goats. The appearance of yellow fever in the area has negatively affected the movement of pastoralists through this area.

3. The Kulbus/ Geneina road, approximately 85 km in length, is important for the trade of millet and sheep from the north to Geneina market, and for sugar, fuel and other commodities transported north from Geneina to Kulbus. The number of check points on this route has been gradually falling, from 18 to 20 in the last quarter to 12 this quarter, indicating some improvement. A total of SDG 80-100 must be paid per truck as security fees. The major obstacle on this route is the banning of fuel to the area because of insecurity, forcing up commodity prices, although Kulbus does have an active trading relationship with North Darfur.

The Adiecong/ Geneina road is a particularly important route for trade between Chad and Geneina, both formal and informal. Sugar, soft drinks, and grocery items are exported from Geneina to Chad, and perfumes, soaps and cosmetics are imported from Chad. Cross-border trade in these commodities is functioning normally but the authorities on either side of the border occasionally impose restrictions. For example, the Sudanese authorities have prohibited the movement of fuel from Sudan across the border and the Chadian authorities have prohibited the movement of cereals from Chad across the border.
Fruits and Vegetables

The price of fresh fruit and vegetables are subject to high seasonal variation throughout the year. For example, the price of onions increases from August to January each year, and then falls during the harvest season in winter, between February and July. See Figure 11. The price of tomatoes normally rises between April and August each year, then falls in September/October when the harvest begins. See Figure 12. When the price rises steeply in the off-season, consumers lose out; when the price falls at harvest time, farmers lose out.

During this quarter many of the monitored markets showed high availability of watermelons, as would be expected at this time of year. The price was relatively stable.

![Figure 11 Price of onions in selected markets in West Darfur, March to November 2012](image)

![Figure 12 Price of fresh tomatoes in selected markets in West Darfur, March to November 2012](image)

Income-generating Activities

Despite the unpredictability of artisanal gold prospecting it is still attracting many people, especially to the Jabal Amir site in North Darfur. This is also pushing up the wage rate for daily labouring, which was SDG 15 per day for agricultural work between June and August 2012, and rose to SDG 30 per day between September and November 2012. It is anticipated that a shortage of agricultural labour may have resulted in a smaller area under cultivation in 2012, thus affecting total agricultural production.

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Ministries with which DRA has a technical agreement in West Darfur:
1. Ministry of Finance and Economy and Civil Service
2. Ministry of Agriculture and Irrigation
3. Ministry of Animal Resources and Fisheries

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