

Trade and Market Bulletin Greater Darfur Region

Darfur Development and Reconstruction Agency



GERALD J. AND DOROTHY R.
Friedman School of
Nutrition Science and Policy



Feinstein
International Center

Covering September to November 2015 • Vol. 1, No. 4 • www.dra-sudan.org • mohamedgido@gmail.com



Regional Headlines:

- Due to the poor harvest this year, which was due to the late and then poor rainfall, cereal prices reported an upward trend in all monitored markets across Darfur except West Darfur.
- There was a significant decline in terms of trade (sack of millet/male goat) in North Darfur due to the poor harvest and poor pasture.
- Livestock prices fell in most monitored markets, particularly in dry areas, and fluctuated in others. This was due to poor pasture, a result of the late and then poor rainfall.
- Cash crops prices showed an upward trend across Darfur because of reduced production levels, despite this quarter being harvest season.
- Fruit and vegetable prices (onions and fresh tomatoes in particular) increased or decreased according to seasonality.
- Most trade routes were stable in terms of security, except for some restrictions in Central Darfur.
- Despite the poor agricultural production and harvesting this year, agricultural labour was the primary source of daily employment opportunities this quarter, but with reduced opportunities and lower wages compared with the same quarter last year in some areas.

Recommendations:

Due to the poor rainfall, poor harvest and poor pasture this year, particularly in North Darfur, close monitoring of food security is strongly recommended in areas worst-affected. Planning for food aid/interventions may be necessary, although food vouchers may not be appropriate in such a drought year.



Background and methodology

The goal of this community-based market monitoring project 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 peace-building opportunities through trade. Through a network of 46 national CBOs/ NGOs, DDRA is monitoring 73 markets across all five Darfur states. 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. DDRA holds quarterly analysis workshops with the CBO enumerators in each state, and the findings are written up as quarterly 'Headline' documents for each state. This trade and market bulletin for the Greater Darfur Region is written and disseminated after the headline documents. It summarises the analysis at state-level and comments on inter-state trade.

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Cereals:

The impact of poor rainfall affected most monitored markets this quarter, particularly those in North Darfur such as Malha, Um Kadada and Dar Alsalam, where terms of trade between livestock (male goat) and cereals (sack of millet) showed a downward trend. See Figure 1 for the terms of trade in three of the Darfur state capitals.

Cereal prices in other states were stable or fluctuated - typically cereal prices fall this quarter (harvest season) but the poor harvest this year kept prices up. Out of all the production areas, millet prices were highest in Dar Alsalam, North Darfur, which is both a cash crop producing and cereal producing area, and where rainfall was exceptionally low in 2015. Prices were stable in most cereal production areas, such as Saraf Omra in North Darfur; Um Dukhun, Bindisi and Mukjar in Central Darfur; Kulbus and Seleia in West Darfur; and Umdafog in South Darfur. This stability of cereal prices in production areas, caused by low production levels, is considered abnormal for this time of year as normally prices would fall. See Figure 2. The price of sorghum, both food aid and locally produced sorghum, followed a similar trend to millet prices in those markets that reported availability.

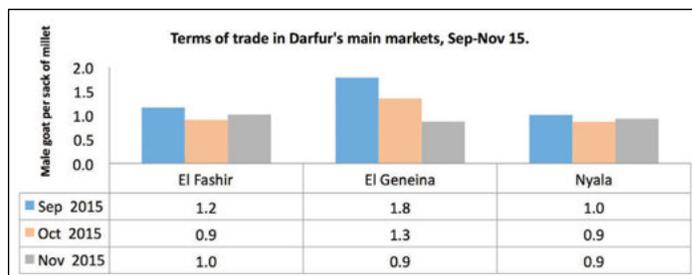


Figure 1: Terms of trade between livestock (male goat) and cereal (sack of millet) in Darfur's main markets, September to November 2015.

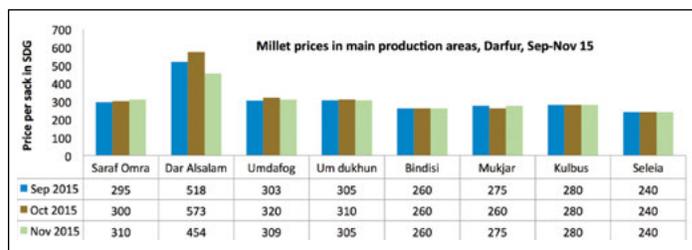


Figure 2: Millet prices in main production areas, Darfur, September to November 2015.



Livestock:

The late, poor rainfall this year led to poor pasture in most of the region but particularly in drought-prone areas such as North Darfur. During this quarter livestock prices varied across Darfur, increasing in some areas affected by poor pasture from whence livestock moved away, such as in Abu Jabra and Alferdus in East Darfur, Malha and El Lait in North Darfur. Prices were stable or decreased in others. In some markets there appeared to be distress sales of livestock, triggered by lack of pasture which pushed prices down. This was mainly in North Darfur's markets, such as Um Kadada (where large numbers of sheep and goats came from the Malha area, where pasture is poor this year), Tawilla and El Fashir.

Sheep prices decreased in most monitored markets, such as El Fashir and Um Kadada in North Darfur; El Geneina and Kereinik in West Darfur; and Ed Daein and Abu Matarig in East Darfur. Sheep prices increased in most monitored markets during August due to increased demand for Eid Al Adha. See Figure 3.

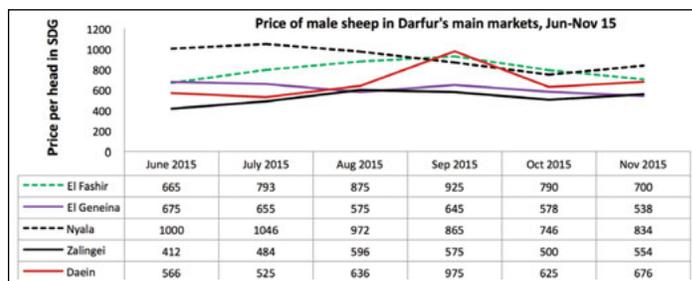


Figure 3: Price of male sheep in Darfur's main markets, June to November 2015.

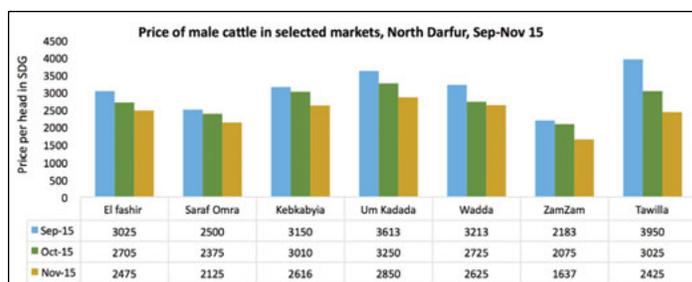


Figure 4: Price of male cattle in selected markets, North Darfur, September to November 2015.

Cattle prices decreased in most monitored markets this quarter, most likely due to the poor pasture this year (particularly in drought affected areas such as North Darfur) as well as because of the impact of pastoralists' seasonal movement. See Figure 4. Pastoralists move from north to south and increase livestock supplies in the areas they pass through and prices subsequently decrease.

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Cash Crops:

Despite this quarter being harvest season, cash crop prices (dried okra and dried tomatoes) increased sharply in most monitored markets, particularly in consumption areas. This was mainly due to the delayed, poor and early phasing-out of the rainy season this year. The price of dried okra increased noticeably during November, for example in Zalingei and Garsilla in Central Darfur, and in Ed Daein and Abu Matarig in East Darfur. The price of groundnuts decreased in some of the main markets during this quarter, such as in El Fashir, El Geneina and Zalingei, but increased in Nyala and Ed Daein. See Figure 5. Although the price of groundnuts decreased or was stable in the main markets, some markets reported unavailability of groundnuts (e.g. Bindisi, Garsilla and Dellage markets in Central Darfur) due to limited supplies following the poor harvest.

Dried tombac prices in the main markets in North Darfur (El Fashir, Tawilla and Tabit) continued increasing because of a

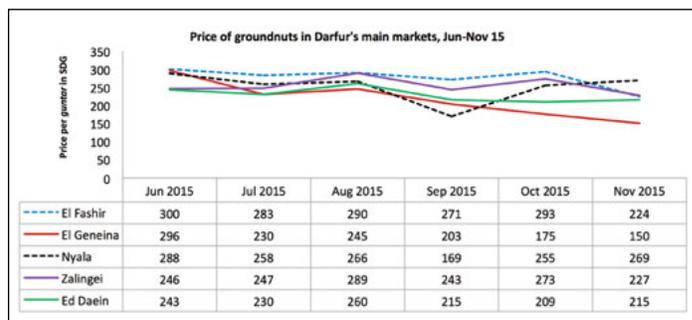


Figure 5: Groundnut prices in Darfur's main markets, June to November 2015.

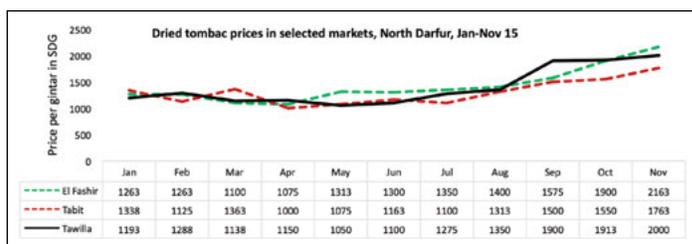


Figure 6: Dried tombac prices in selected markets, North Darfur, January to November 2015

supply shortage due to *wadis* not flowing as normal, and therefore tombac production was poor this year. See Figure 6. The poor harvest of cash crops (groundnuts, dried okra, dried tomatoes and dried tombac) is expected to affect household livelihoods in cash crop production areas where households depend on cash crops to get cereals.



Fruit and Vegetables

Due to the phasing-out of the harvest season onion prices rose in almost all monitored markets, which is normal at this time of the year. The highest quarterly average price of onions was reported in Ed Daein in East Darfur (a consumption area) whilst the lowest was in Zalingei (a production area). See Figures 7 and 8. On the other hand, fresh tomato prices showed a downward trend in most monitored markets, mainly due to the beginning of the harvest season and an increase in supplies.

However, quantities are less compared to previous seasons due to the poor rainfall and poor flow of *wadis* this year.

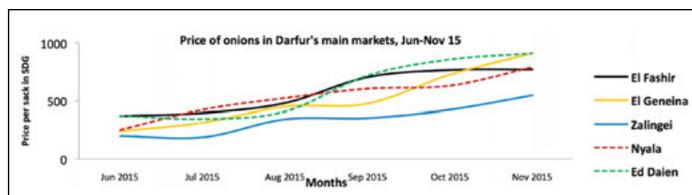


Figure 7: Onion prices in Darfur's main markets, June to November 2015.

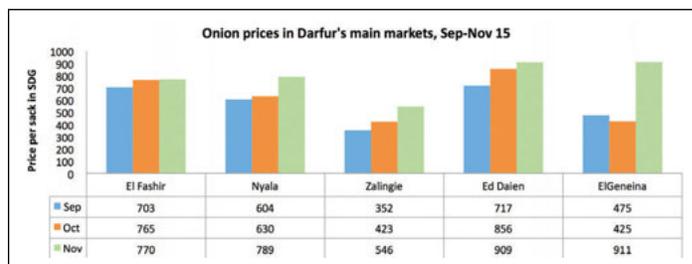


Figure 8: Onion prices in Darfur's main markets, September to November 2015.

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Trade routes and transportation access

Improvement in the security situation in the region meant that trade routes, within states, connecting states, and connecting Darfur to other areas were stable this quarter (e.g. the El Ingaz trade route). Mobile traders started to move between primary markets in Shengili Tobay, Tabit and Dar Alsalam in North Darfur. Fruit and vegetables started to flow from Kutum (a production area) to El Fashir (a consumption area) using trucks and lorries in North Darfur. No new checkpoints were reported in North, West, South or East Darfur. The exception to this overall

pattern was the route connecting Ed Daein in East Darfur to Omdurman, which was still closed due to localised conflict as mentioned in the previous bulletin (June to August 2015). Some insecurity and increases in checkpoints were reported in some parts of Central Darfur this quarter, such as on the Nyala-Zalingei road through Korally, and on the Zalingei-El Geneina paved road, where some security restrictions were in place and accordingly people increased the use of small vehicles instead of heavy trucks.

Daily labour:

Although poor rainfall and a poor harvest season were reported in most areas in Darfur, agricultural activities (harvesting) were the main daily labouring opportunities in most areas. However, because of the poor harvest there were less labouring opportunities as well as a decrease in daily wages in some areas compared with the same quarter last year. For example, in El Lait in North Darfur the wage for millet harvesting per *mohkamas* decreased from SDG 150 last year to SDG 100 this year, and for groundnuts from SDG 250 last year to SDG 200 this year. In Zamzam in North Darfur the wage rate for millet harvesting per

day decreased from SDG 30-40 last year to SDG 25-30 this year. Because of the early phase-out of the rainy season and the subsequent limited opportunities for agricultural labouring this year, brick-making and construction work started earlier than usual, in early October instead of November, and the cost of daily wages increased from SDG 40-45 last year to SDG 50-70 this year in Zalingei, Central Darfur. In El Fashir they increased from SDG 60-70 last year to SDG 80-100 this year. This appears to reflect continued growing demand for bricks associated with urbanization and displacement to urban areas in Darfur.



This project is funded by the European Union

DDRA has a technical agreement with a number of ministries in each Darfur state: North, West, Central, South and East



GERALD J. AND DOROTHY R.
Friedman School of
Nutrition Science and Policy



Advisory support: Feinstein International Center, Tufts University

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