

Trade and Market Bulletin Central Darfur



Darfur Development and Reconstruction Agency

Covering the Quarter September to November 2013 • Vol. 1, No. 2 • www.dra-sudan.org • mzakaria065@gmail.com



Headlines

- During this quarter (September to November 2013), there was an upward trend in cereal prices in almost all monitored markets in Central Darfur as a result of the poor harvest season, which was due to the very short rains. As in the last quarter, unusually Um Dukhun market (usually a major area of production) registered the highest millet prices, a consequence of the localised conflict which broke out in June 2013 and is still ongoing. Um Shalaya market, where production was relatively better, registered the lowest millet prices.
- There have been varied trends in livestock prices in different monitored markets in Central Darfur, depending on whether herds gathered in the area

or moved away. In October sheep prices rose in some monitored markets as many sheep were transported by air to Omdurman and Khartoum to meet the demands of Eid al-Adha. Treij market, which is in a more stable area, far from severe conflict and frequented by traders, reported increased cattle prices during the quarter.

- For the cash crops that were available, most registered an increase in price reflecting the very poor harvest this year. The price of dried tomatoes and dried okra rose sharply. Groundnut prices registered a small increase in some markets and were stable in others. As in West Darfur, a number of cash crops were not available in any of the monitored markets this quarter, for example sesame, watermelons, hibiscus and gum arabic. Often this is because farmers have decided not to cultivate these crops, which take longer to mature, in order to reduce the likelihood of conflict between farmers and pastoralists if their fields are grazed.
- The price of fresh fruit and vegetables followed seasonal trends. Onion prices rose steadily in all targeted markets, whereas the price of fresh tomatoes decreased sharply. Orange prices increased slightly.
- There were no major changes in trade routes during the quarter, although some trade routes that had been closed by the flow of wadis in the last quarter have now reopened after the rainy season. Access to many markets was impeded by localised conflict.
- Most daily labouring during the quarter was agricultural work: transplanting onions and potatoes, cutting sugar cane and harvesting millet and sorghum.

Recommendations

- As cereal prices rise after a poor harvest, exacerbated by conflict affecting the main production area in Central Darfur, Um Dukhun, close monitoring of household food security is strongly recommended this year.

Participating CBOs and the markets they monitor

Sudanese Environment
Conservation Society (SECS)
Zalingei

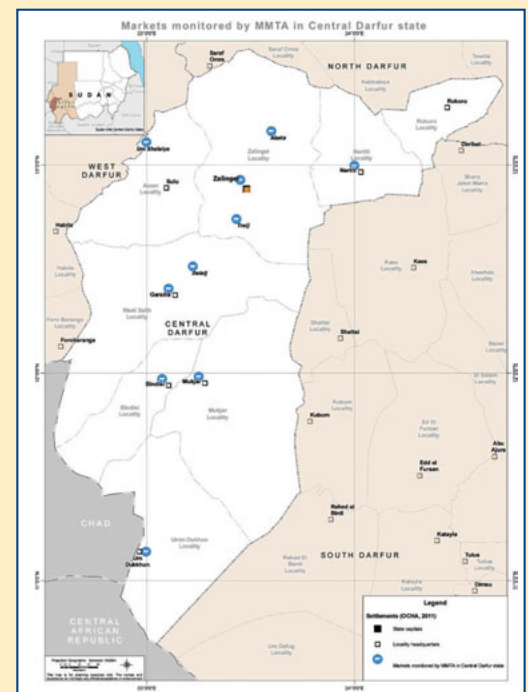
Darfur Development and
Reconstruction Agency (DRA)
Umshalaya

Almanar
Nerteti

Daro Baida
Garsila and Delaig

Albaraka Agriculture
Organisation (AAO)
Bendisi, Umdukhn and Mukjar

Arebow Charity Organisation (ACO)
Abatta and Tereig





Cereals

Cereal prices have shown an upward trend in almost all monitored markets this quarter. There are two main reasons for this. First, the harvest was poor because of unusually short rains, especially in the major production areas of Garsilla and Dellage; and second there is ongoing conflict in the area. This has meant that, in some locations, households have reduced the area under cultivation. This may have had a particularly negative impact on cereal production in Mukjar, Bindisi and UmDukhun. Harvest production in northern parts of Central Darfur, within the Wadi Azum zone (Um Shalaya, Abata and Zalingei), seemed to be better than southern parts, in the Wadi Salih zone (Garsilla, Dellage, Mukjar and Um Dukhun), where the localised conflict is taking place.

Millet prices rose during October in most monitored markets when the poor harvest started to become evident and farmers

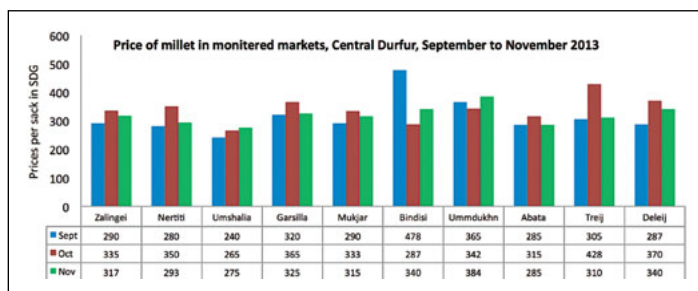


Figure 1: Price of millet in monitored markets, Central Darfur, September to November 2013

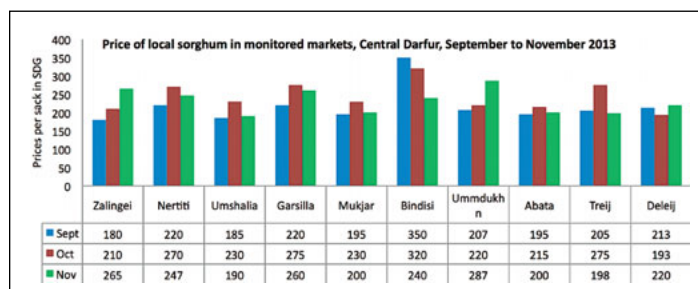


Figure 2: Price of local sorghum in monitored markets, Central Darfur, September to November 2013

reduced supply. See Figure 1. Millet prices then fell slightly in November when it became apparent that cereals from areas with slightly better rainfall, such as UmShalaya and Abata, were available. Additionally, free food aid was distributed by WFP to some areas during this quarter. Um Dukhun continued to report the highest millet prices due to difficulty accessing the area following the rainy season and because of the ongoing conflict; Um Shalaya reported the lowest.

Prices of local sorghum have also shown an upward trend in most monitored markets, which is again a reflection of the poor harvest and localised conflict. Prices increased in October and fell slightly in some markets during November for the same reasons as millet. Bindisi and UmDukhun (in the conflict zone) registered the highest prices. Prices were particularly high in Bindisi in September because of frequent market closures, and limited access (and therefore limited supply) due to the conflict. The Wadi Azum zone (Abata and UmShalaya), registered the lowest prices. See Figure 2.

Prices of food aid sorghum were more stable this quarter than the last, although there was an overall upward trend. See Figure 3. There was some distribution of food aid sorghum by WFP, which may have helped stabilise prices. There was also high demand for food aid sorghum for use as animal fodder. The lowest price was reported in Nertiti, and the highest reported in Bindisi and UmDukhun. See Figure 3.

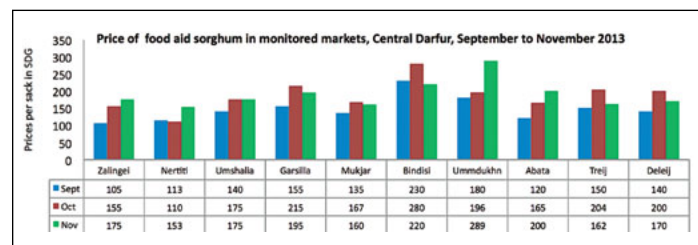


Figure 3: Price of food aid sorghum in monitored markets, Central Darfur, September to November 2013



Livestock

Prices of livestock fluctuated in almost all selected markets as pastoralists moved to avoid localised conflict. The blocking of some trade routes due to the conflict, and difficulty accessing livestock sources, may have reduced the quantity of livestock in some markets causing prices to increase. UmDukhun market continued to report the lowest livestock prices. Bindisi market was badly affected by conflict during the quarter; therefore it was not possible to collect data on a regular weekly basis.

Cattle prices have shown stability in almost all selected markets. Traders in Mukjar, Nertiti and UmShalaya reported limited supply of cattle reflecting the restricted movement of pastoralists. The highest cattle prices were registered in Treij, an important market for cattle being sent to Omdurman as it's in a more stable area and frequented by traders. September to November is an

important time for cattle to be purchased and sent to Omdurman, hence higher prices. Zalingei market's proximity to Treij may have led to price increases in Zalingei too. See Figure 4.

Sheep prices increased during October in some markets due to Eid al-Adha. For example many sheep were shipped from Zalingei to Khartoum by air to meet Eid-al-Adha demand, which led to increased prices in Zalingei and Treij. Garsilla, Bindisi and Dellage reported a shortage of supply of sheep during October. This was due to the restricted movement of pastoralists after the conflict resumed, especially from the supply area in Um Dukhun. See Figure 5. Despite this prices in these markets remained modest in October because outside traders could not access them due to the conflict, and because of the local preference for cattle meat.

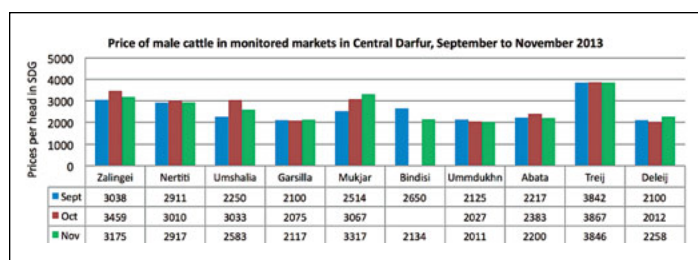


Figure 4: Price of male cattle in monitored markets, Central Darfur, September to November 2013

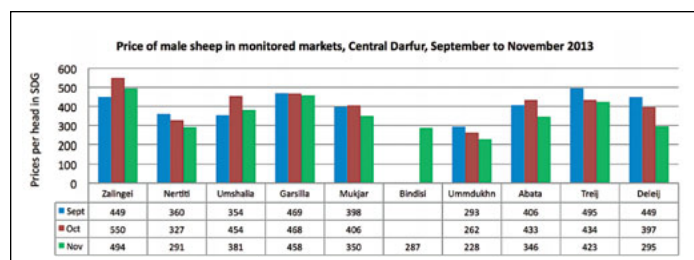


Figure 5: Price of male sheep in monitored markets, Central Darfur, September to November 2013

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Cash Crops

Although it is harvest season, cash crop prices have shown an upward trend in almost all monitored markets compared to last quarter. This reflects the poor harvest and the security situation, both of which reduced supply to markets. Prices of both dried tomato and dried okra increased sharply in November in most monitored markets. Dried okra is produced in the Wadi Salih zone, an area affected by the conflict and thus also negatively affecting production, while dried tomato is produced in Jabal Mera (Nertiti) and the Wadi Azum zone, but tomato production has been affected by pests. See Figures 6 and 7.

Groundnut prices this quarter showed some stability in most monitored markets, with the exception of Garsilla where it increased. The supply road from Um Dukhun (production area) to Garsilla (consumption area) has been blocked as a result of insecurity and this has raised the price of cooking oil in Garsilla. See Figure 8.

Many cash crops, such as sesame and hibiscus, were not available in any of the monitored markets this quarter. This is because many farmers have decided not to cultivate such crops, which take longer to mature and are therefore harvested later, increasing the likelihood of conflict between farmers and pastoralists if the fields are grazed.

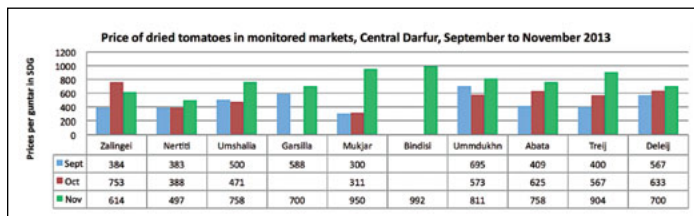


Figure 6: Price of dried tomatoes in monitored markets, Central Darfur, September to November 2013

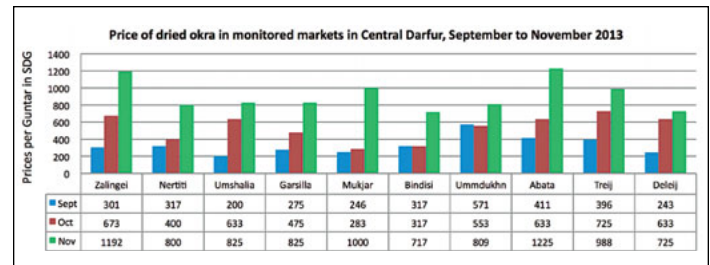


Figure 7: Price of dried okra in monitored markets, Central Darfur, September to November 2013

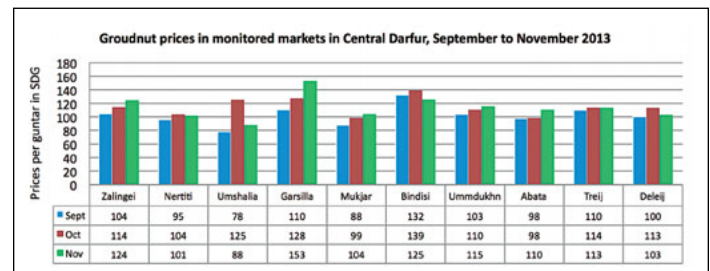


Figure 8: Groundnut prices in monitored markets, Central Darfur, September to November 2013

Fruits and Vegetables

Onion prices rose steadily in all monitored markets during this quarter reflecting the off season. See Figure 9. Fresh tomato prices started decreasing in most monitored markets reflecting the beginning of the production season. See Figure 10. Although Central Darfur is considered part of the orange production zone (Nertiti in particular), the price of oranges increased slightly, again reflecting the off season.

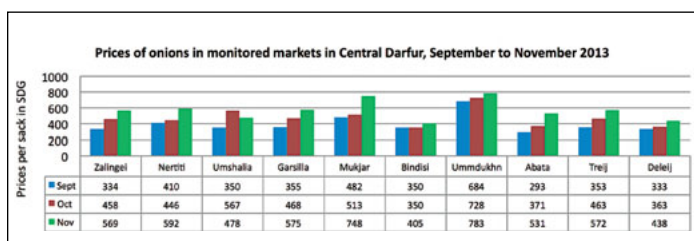


Figure 9: Prices of onions in monitored markets, Central Darfur, September to November 2013

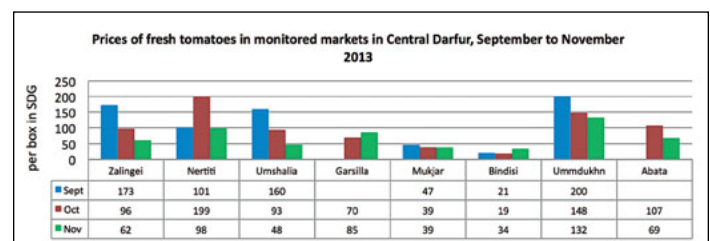


Figure 10: Prices of fresh tomatoes in monitored markets, Central Darfur, September to November 2013

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Transportation: Access and Costs

No changes were reported on the road connecting Zalingei and Nyala, the major trade route connecting Central Darfur to other parts of Sudan (213km, 81 check points). The road connecting Zalingei, UmDukhun, and Garsilla (212km) was closed for some time due to insecurity and flowing wadis, but reopened during this quarter. However, only some risked travelling this route, for which the passenger fare was SDG 60, while trucks had to pay a total of SDG 750 in fees to those controlling the check points. Access to many of the monitored markets was negatively affected this quarter by insecurity.



Daily Labouring

Because of the harvest season the main daily labouring opportunities during the quarter were agricultural, including harvesting millet and sorghum, planting onions and potatoes, and cutting sugar cane. Wage rates were marginally higher

because of the high demand for daily labouring, yet there were limited workers available and a limited time period for such agricultural activities. See Table 1.

Table 1: Daily labour access and costs

Activity	Wage rate SDG per day	Gender
Farm work	30 - 60	Mainly women
Building work	25 - 30	Women /men/ children
Brick-making	25 - 30	Women /men/ children
Restaurant and tea services	15 - 20	Women / children
Domestic service (Zalingei)	15	Women

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 peace-building opportunities through trade. Five CBOs/NGOs plus DRA are monitoring 10 markets across Central Darfur 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.



Feinstein
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Ministries with which DRA has a technical agreement in North 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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