

Trade and Market Bulletin Central Darfur



Darfur Development and Reconstruction Agency

Covering the Quarter December 2013 to February 2014 • Vol. 1, No. 3 • www.dra-sudan.org • mzakaria065@gmail.com



Headlines

- **Cereal prices** stabilised this quarter compared to the previous quarter (September-November 2013). However, prices were still very high. Millet was 67% higher in Zalingei market compared to the same quarter in 2013. Similarly a sack of sorghum was more than double the price in January 2013.
- Markets in the Wadi Salih area (Garsilla, Mukjar, Bendisi and Um Dukhun) reported the highest cereal prices during the quarter although they are historically the main production areas. Meanwhile, markets in the Azoom area, Abata, Treij and Um Shalaya, which are the main cash crop areas, reported the lowest cereal prices. This unusual situation reflects the negative impact of localised conflict on the main areas of production.
- **Livestock prices** in the monitored markets showed varied trends during the quarter according to local conditions. Treij and Zalingei markets continued to be the main livestock markets in Central Darfur instead of Um Dukhun, reflecting the impact of localised conflict in the Wadi Salih zone.
- **Cash crop prices** rose sharply across most monitored markets during the quarter, particularly dried tomatoes and dried okra, both of which hit record highs. This is due to the poor harvest and probably also the early arrival of pastoralist livestock grazing on farms. Although this has been an ongoing issue, livestock moved south particularly early this year because of poor grazing further north. Pest infestation affected dried tomato production. Some seasonal cash crops appeared in some markets - sugar cane in Um Shalaya market and sweet potato in Abata market.
- In terms of **fresh fruit and vegetables**, onion prices fell from January onwards, the normal trend following the seasonal harvest. Likewise fresh tomatoes registered a slow decline in prices, although there was no availability in some markets such as Treij and Dellage.
- The **trade route** linking Zalingei with Um Dukhun market reopened after the rainy season, and following the forging of some local agreements between hostile groups, but was not used by traders owing to the perceived high risks.
- Similar to last quarter **agricultural activities** were the main source of daily labouring for many households, including winter season farming.

Participating CBOs and the markets they monitor

Sudanese Environment Conservation Society (SECS)
Zalingei

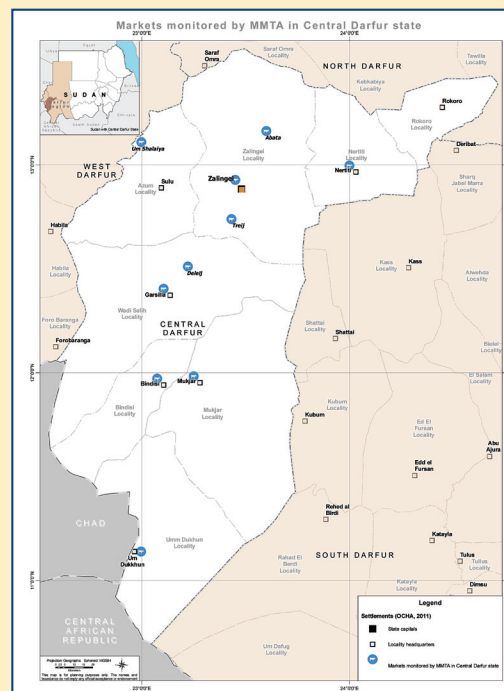
Darfur Development and Reconstruction Agency (DRA)
Umshalaya

Almanar
Nerteti

Daro Baida
Garsila and Delaig

Albaraka Agriculture Organisation (AAO)
Bendisi, Umdukhn and Mukjar

Arebow Charity Organisation (ACO)
Abatta and Tereig



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millet in January 2014, which is harvest time, was 67% higher than the price in January 2013; the price of a sack of sorghum was more than double the price in January 2013. See Figure 1¹. One possible reason for these high but stable prices was the impact of the harvest season. Another possible reason was an improvement in security as a result of local agreements between hostile groups in the Um Dukhun area in the south of the state. However, the security situation deteriorated again in February 2014. A third possible reason was that the distribution of food aid by WFP in January 2014 in some areas influenced prices to fall, e.g. in Zalingei, Treij, Abata and Garsilla.

Once again the highest cereal prices were reported in the markets in the Wadi Salih area, such as Garsilla, Mukjar, Bendisi and Um Dukhun. This is despite the fact that these areas are well known for their cereal production, not only in Central Darfur but in the whole Darfur region. In contrast, markets in the Azoom area - Abata, Treij and Um Shalaya - reported the lowest cereal prices despite being cash crop production areas. See Figure 2. This unusual situation reflects the negative impact that localised conflict had on the main areas of production, and the possible consequences of pastoralist livestock moving south earlier than usual and grazing on farms.

Cereals

During this quarter cereal prices stabilised, but remained higher than they were during the same quarter last year, in most of the monitored markets in Central Darfur. This is despite the fact that this quarter is the cereal harvest season, and reflects the poor production season in 2013/14 as well as the impact of inflation. In Zalingei market, for example, the price of a sack of

Food aid sorghum was distributed by WFP in January 2014 to all monitored markets except Bendisi. Local authorities in Bindisi tried to move the food aid stored in warehouses close to the IDP camp to warehouses further away. The IDP camp opposed this and the confrontation between the camps and the local authorities escalated, resulting in injury and loss of life. Therefore no food aid was distributed during the quarter in Bendisi, which contributed to keeping the price of both sorghum and food aid sorghum high in this market. Sorghum and food aid sorghum prices also remained high in Um Dukhun because of cross-border trade with Chad and the Central African Republic. The lowest price was recorded in Deleij due to the impact of localised conflict. However the overall trend was one of stability. See Figure 3.

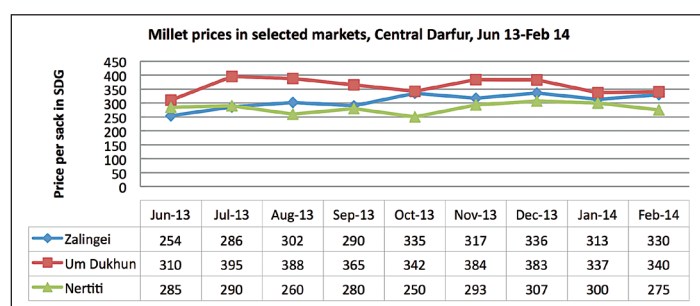


Figure 1: Millet prices in selected markets, June 2013-February 2014

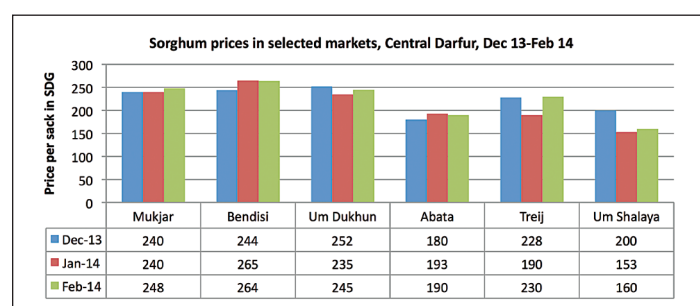


Figure 2: Sorghum prices in selected markets, Central Darfur, December 2013-February 2014

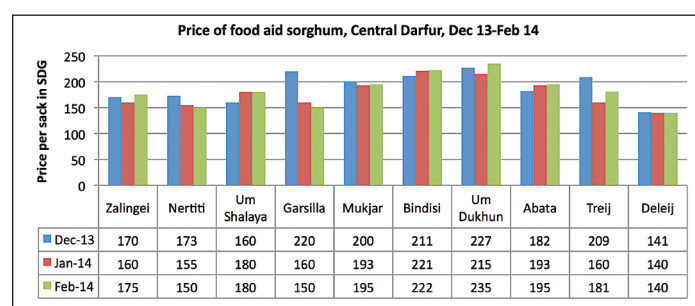


Figure 3: Price of food aid sorghum, Central Darfur, December 2013-February 2014

¹ Although the MMTA project has only been collecting weekly price data since June 2013, price data for January 2013 was collected from key informants.

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Livestock

Generally the trend in livestock prices varied from one market to another according to local conditions, as was the case last quarter. An agreement was signed between the local tribal groups in the Wadi Salih area in January 2014, and the security situation temporarily improved. However, by February the security situation had deteriorated again as the groups failed to adhere to the agreement. The signing of the agreement affected markets in the area in different ways. In Mukjar the price of cattle and sheep noticeably increased as some trade routes to the market were reopened and the security situation improved slightly, and livestock traders and their agents from Nyala, South Darfur, visited the market. On the other hand, livestock prices in Um Dukhun did not respond to the agreement and prices remained lower than in Mukjar. This was because the use of trade routes to access the market continued to be seen as high risk due to the continued presence of armed groups.

Treij and Zalingei markets continued to be Central Darfur's main livestock markets this quarter rather than Um Dukhun, as the impact of localised conflict in the Wadi Salih zone turned both Treij and Zalingei markets into cattle hubs. Since the project began monitoring the markets in April 2013, both Treij and Zalingei markets have been relatively stable and secure. Localised conflict has been a fair distance away from these markets, and both are reasonably close to Zalingei, the capital of

the state. Additionally they are accessible, and routes both in and out of the markets have remained open. All these factors have encouraged agents of big cattle traders from inside and outside Darfur to come and buy cattle from these markets, mainly for export to Omdurman but also to the Gulf countries through Port Sudan. Prices in Zalingei decreased in February as livestock gathered around the market after the *talaig*, thus increasing supply. Prices at all other markets stayed relatively stable this quarter. See Figure 4.

The trend in sheep and goat prices also varied from place to place according to local conditions. Zalingei, Mukjar and Treij markets reported the highest prices for both sheep and goats, while Um Dukhun reported the lowest prices, for the same reasons as above. See Figure 5.

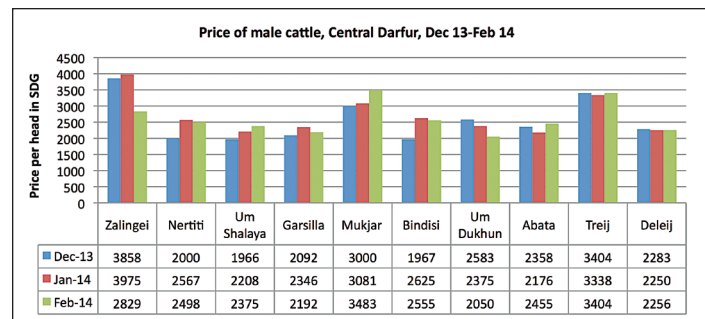


Figure 4: Price of male cattle, Central Darfur, December 2013-February 2014

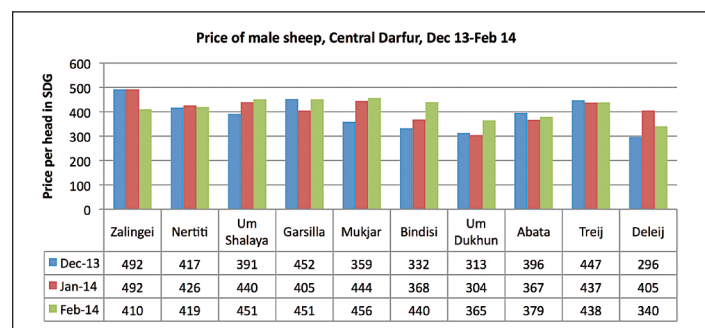


Figure 5: Price of male sheep, Central Darfur, December 2013-February 2014

Transportation: Access and Costs

The trade route linking Zalingei with Um Dukhun market reopened after the rainy season and the forging of some local agreements between hostile groups, but was not used by traders owing to the perceived high risks. Following the reopening the number of check points increased. All other trade routes remained open during the quarter.



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Cash Crops

The price of dried okra hit record highs this quarter. See Figure 6. This was due to the poor seasonal harvest this year but also may be due to farmers moving out of okra production. Okra is vulnerable to livestock grazing on farms so the earlier arrival of pastoralist livestock may be encouraging farmers to shift into growing cereals such as millet and sorghum instead, which mature a little earlier than okra and can be harvested in November/December while okra is harvested in January/February. Although grazing by pastoralist livestock on farms has been an ongoing issue during the conflict years, it started particularly early this year because of poor grazing further north.

The price of dried tomatoes also hit record highs this quarter. Pest infestation was particularly bad this harvest season in the production area of Jebel Marra (Nertiti), and this affected the production of the type of tomato used for drying, which is only grown in Jebel Marra. During this quarter the price of dried tomatoes in Zalingei market was 32% higher than in Geneina, and 8% higher than in El Fashir, despite the fact that Zalingei is close to the area of production. See Figure 7.

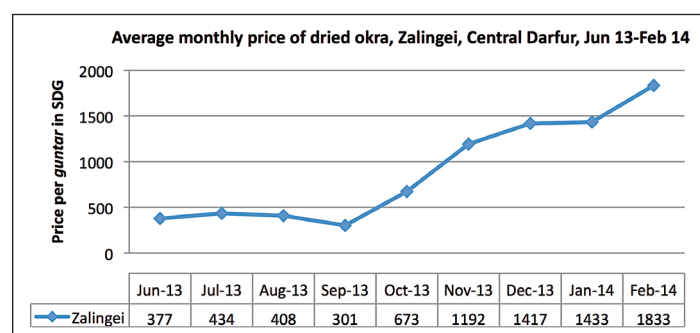


Figure 6: Average monthly price of dried okra, Zalingei, Central Darfur, June 2013-February 2014

Groundnuts were reported in almost all monitored markets and prices this quarter were stable. The exceptions to this were Garsilla and Dellage markets, which saw prices rise in January 2014. This was due to the poor harvest and lack of supply from Um Dukhun. However, the longer term trend (June 2013-February 2014) is of steadily rising groundnut prices. See Figure 8.

Some seasonal cash crops appeared in some markets this quarter: sugar cane in Um Shalaya market, *bambai* (sweet potato) in Abata market, and garlic in both Um Shalaya and Nertiti market. These seasonal cash crops, which are mainly produced in Central Darfur, significantly support the livelihood strategies of households in these localities.

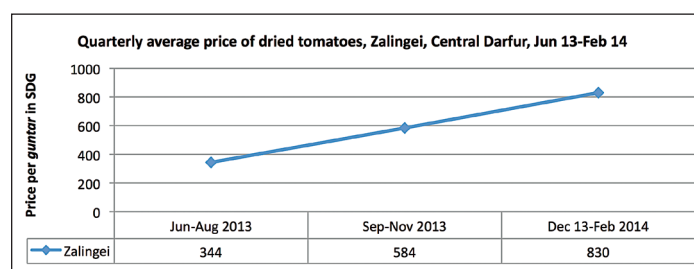


Figure 7: Quarterly average price of dried tomatoes, Zalingei, Central Darfur, June 2013-February 2014

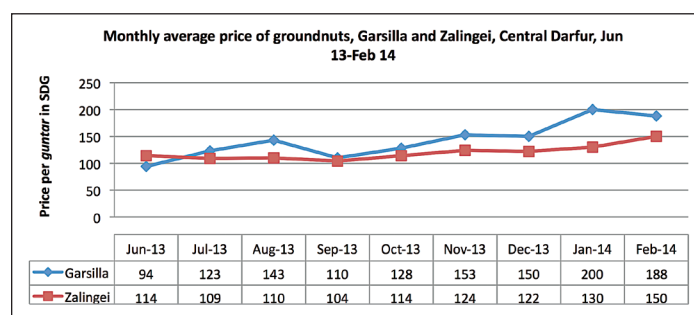


Figure 8: Average monthly price of groundnuts, Garsilla and Zalingei, Central Darfur, June 2013-February 2014

Daily Labouring

The agricultural sector remained the main source of daily labouring work during this quarter, because of the winter farming season. The wage rate for agricultural work was similar to the wage rate for construction and brick-making, although the latter

requires skilled labour and therefore normally commands a higher wage. The main agricultural activities during the quarter were planting, transplanting and weeding onions and sweet potatoes, as well as harvesting sugar cane. See Table 1.

Table 1: Daily labouring activities, Central Darfur, December 2013-February 2014

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

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Fruits and Vegetables

The price of fruit and vegetables in the Darfur region are usually significantly affected by the seasonal harvest, as they are perishable products available for a relatively short period, and there are no paved roads to assist with transporting them from production areas to more distant consumption areas.

Onion prices hit record highs in December and then fell from January onwards, the normal seasonal trend. The highest onion prices were recorded in Mukjar market where demand was high, while the lowest prices were reported in Zalingei market, a major production and consumption area. See Figure 9.

The price of fresh tomatoes also registered a slow decline, although there was no availability in some markets, such as Treij and Dellage. This was due to the early *talaig*.

In terms of fruit, only oranges were available in most of the monitored markets this quarter, and orange prices demonstrated an upward trend because this quarter was the off-season. The exceptions were Garsilla and Bendisi markets where oranges were not available. The highest prices were reported in both Um Shalaya and Um Dukhun markets.

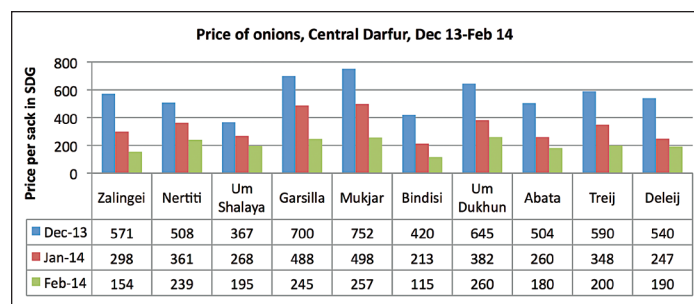


Figure 9: Price of onions, Central Darfur, December 2013-February 2014

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.



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Feinstein International Center

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Ministries with which DRA has a technical agreement in Central Darfur:

1. Ministry of Agriculture, Animal Resources and Irrigation
2. Ministry of Finance, Economy and Labour

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