Trade and Market Bulletin
North Darfur

Darfur Development and Reconstruction Agency

Covering the Quarter March to May 2013 • Vol. 3, No. 2 • www.dra-sudan.org • mzakaria065@gmail.com

Headlines

- Cereal prices remained stable this quarter in all 15 monitored markets in North Darfur, as a result of the good harvest in the last season.
- Livestock prices in North Darfur have also been fairly stable this quarter with some fluctuations according to pastoralist movements. The export of camels to Libya stopped after the Jebel Amir conflict because of insecurity: the price of export camels in North Darfur fell but has shown some recovery since March 2013.
- Tombac prices remained stable this quarter in anticipation of trade resuming between Sudan and South Sudan.
- Groundnuts prices have continued to fall this quarter, reflecting the high production of the last season and limited market outlets for groundnuts.
- Onion prices decreased sharply in most markets in North Darfur. This follows normal seasonal trends but may also indicate some recovery of onion production since the Jebel Amir conflict.
- During the quarter most trade routes within North Darfur have been relatively stable, including the trade route connecting El Fashir, Kutum, Kebkabiya and Saraf Omra.

Recommendations

- As groundnut prices continue to fall, ways of supporting the groundnut sector should be sought as it is anticipated that many farmers will switch out of groundnut cultivation in the 2013 agricultural season.

Participating CBOs and the markets they monitor

EVNRHD	El Fashir, Tabit, Tawilla, and Wadda
KEADS	Kutum and Kassab
KSCS	Kebkabiya and Saraf Omra
URDP	Um Kadada and El Lait
DRA	Abu Shook and ZamZam camps
SAG	Mellit
DWDA	Dar Alsalam
Buzza	Malha

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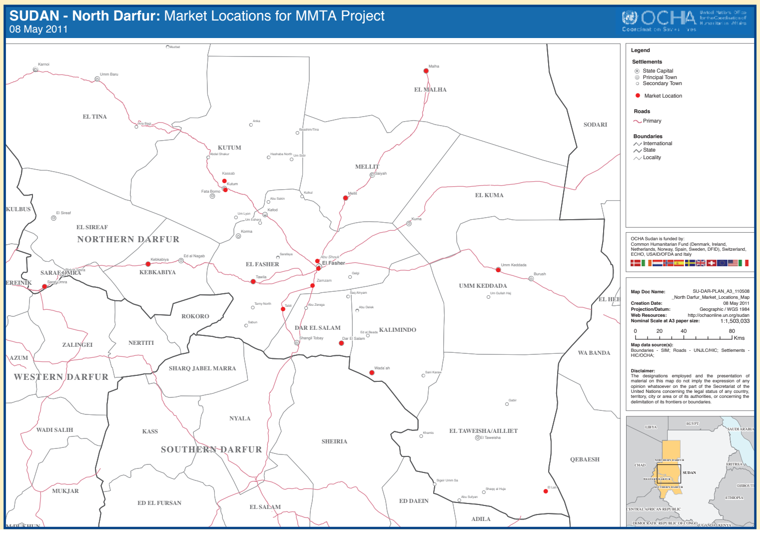

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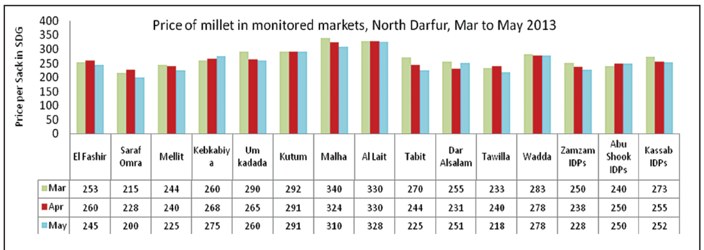
Cereals

Cereal prices have been stable across North Darfur during the quarter, reflecting the positive harvest in 2012. See Figure 1. In Abu Shouk IDP market, for example, millet prices were remarkably stable as the market continued to be supplied by the surrounding area. Although millet has been officially endorsed as a key commodity in WFP's food voucher programme, instead of sorghum, in Saraf Omra where the voucher scheme is being implemented, the lowest price of millet was recorded during the quarter: SG 200 per sack in May 2013. The millet price in Kebkabiya increased during the quarter, which may reflect the negative impact of the Jabal Amir conflict on primary markets in the area which normally supply Kebkabiya market. Once again the highest millet prices were recorded in Al Lait market, a major area of groundnut production that is supplied with cereals from the Um Kadada area, and in Malha market. In Malha market, however, there was a small but unusual fall in the price of millet during the quarter. This may be a positive consequence of the food-for-work programme that the NGO, COOPI, has implemented in two sites in the Malha area. As mentioned in the last bulletin, Malha market is in close proximity to the Sayah area which enjoyed a good agricultural season in 2012. Wada'a and Dar Alsalam localities continued to implement the local orders banning the movement of millet outside the respective locality's borders, as reported in the last bulletin: millet prices were stable in both of those markets.

Figure 2 demonstrates the lower and more stable price of millet in El Fashir market in the first five months of the year, between January and May 2013 compared with 2012. However the price in 2013 is substantially higher than in 2011.



	El Fashir	Saraf Omra	Mellit	Kebkabiya	Um kadada	Kutum	Malha	Al Lait	Tabit	Dar Alsalam	Tawilla	Wadda	Zamzam IDPs	Abu Shook IDPs	Kassab IDPs
Mar	253	215	244	260	290	292	340	330	270	255	233	283	250	240	273
Apr	260	228	240	268	265	291	324	330	244	231	240	278	238	250	255
May	245	200	225	275	260	291	310	328	225	251	218	278	228	250	252

Figure 1: Millet prices in monitored markets in North Darfur, March to May 2013

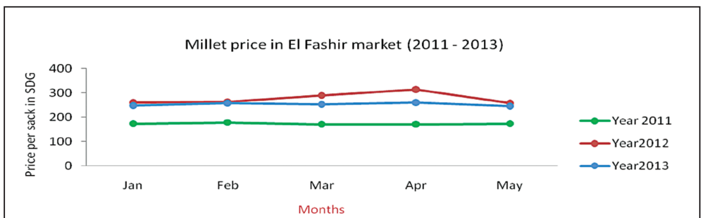
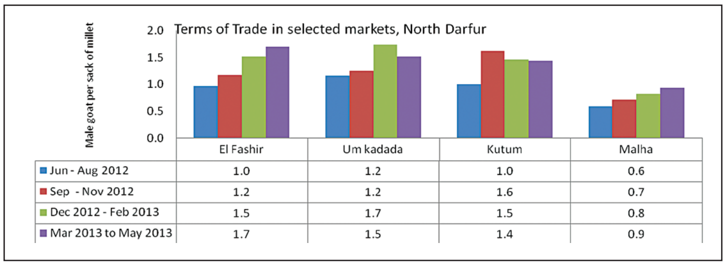


Figure 2: Price of millet in El Fashir market in the first five months of the year: 2011 – 2013

Generally the terms of trade between cereals (a sack of millet) and livestock (a male goat) appears to have improved or stabilized in a number of markets in North Darfur. See Figure 3. In Um Kadada market, however, there was some deterioration in the terms of trade during this quarter. This may be due to new fees introduced by the Government of Sudan, and implemented by the Ministry of the Interior in the Um Kadada area during the quarter. In order to pay the fees it appears that some households had to sell livestock such as goats.



	El Fashir	Um kadada	Kutum	Malha
Jun - Aug 2012	1.0	1.2	1.0	0.6
Sep - Nov 2012	1.2	1.2	1.6	0.7
Dec 2012 - Feb 2013	1.5	1.7	1.5	0.8
Mar 2013 to May 2013	1.7	1.5	1.4	0.9

Figure 3: Terms of trade (goats for millet) in selected markets in North Darfur

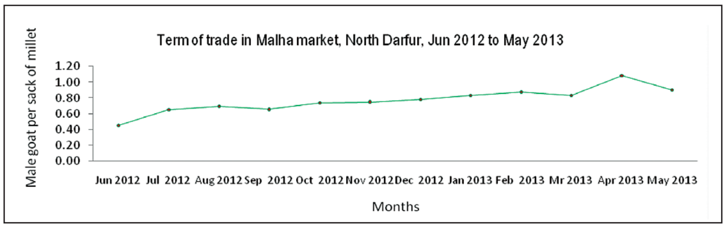


Figure 4: Improvement in the terms of trade (goats for millet) in Malha market since June 2012

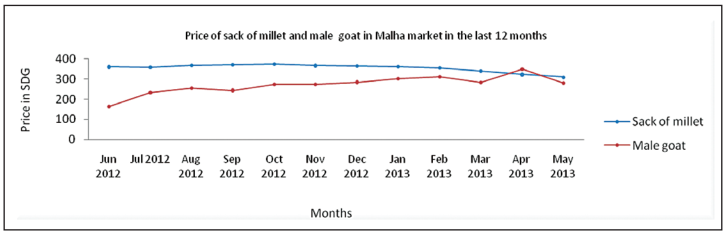
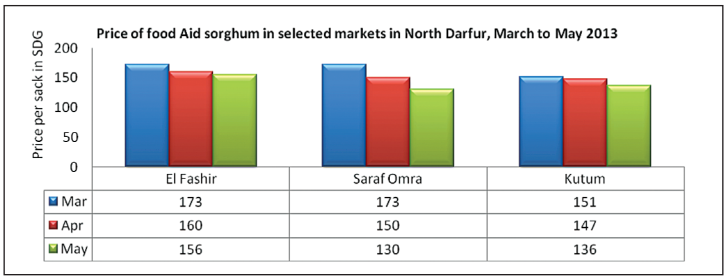


Figure 5: Millet and goat prices in Malha market in the last 12 months



	El Fashir	Saraf Omra	Kutum
Mar	173	173	151
Apr	160	150	147
May	156	130	136

Figure 6: Price of food aid sorghum in selected markets in North Darfur, March to May 2013

Cereals (continued on next page)

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Cereals (continued)

The continued improvement in the terms of trade between millet and goats in Malha, an area of chronic food insecurity, is encouraging. See Figure 4. Figure 5 shows how goat prices have gradually risen in Malha market over the last twelve months while the price of millet has slightly fallen.

The price of food aid sorghum fell slightly in most monitored markets during the quarter. See Figure 6. WFP has continued to distribute free food aid sorghum in some parts of North Darfur such as Kutum and Kassab IDP camp. Meanwhile sorghum has been removed from the list of commodities that are part of the WFP voucher scheme and replaced by millet in some areas including Saraf Omra, Kebkabiya and Abu Shouk IDP camp. Nevertheless, the price of food aid sorghum is still considered relatively high, fuelled by demand for food aid sorghum for fodder for livestock and in dairy farms.

Livestock

Generally livestock prices have remained stable across North Darfur during the quarter. See Figure 7 for sheep prices. In markets such as Saraf Omra, Kutum and Kebkabiya, however, there was a rise in sheep prices during the quarter, probably due to a combination of improved security after the Jebel Amir conflict and also the normal seasonal movement of pastoralist livestock away from those markets. Figure 8 demonstrates the relative stability of cattle prices in selected markets in North Darfur in the last six months with some indication of an upwards trend, except in Kutum market where the high prices earlier in the year may have been influenced by the Jebel Amir conflict.

The export of camels to Libya stopped due to insecurity associated with the Jebel Amir conflict, causing the price of export camels in North Darfur to fall during the quarter. See Figure 9 although there has been some recovery in the price in Saraf Omra since March 2013 as security has improved.

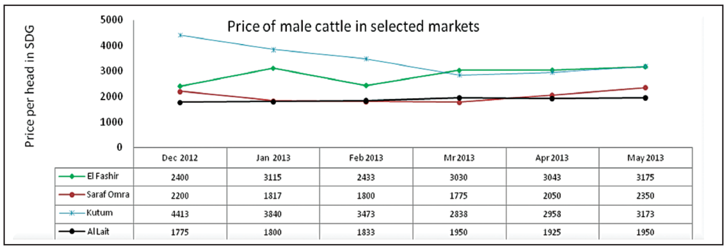

Figure 8: Price of male cattle in selected markets in North Darfur, December 2012 to May 2013

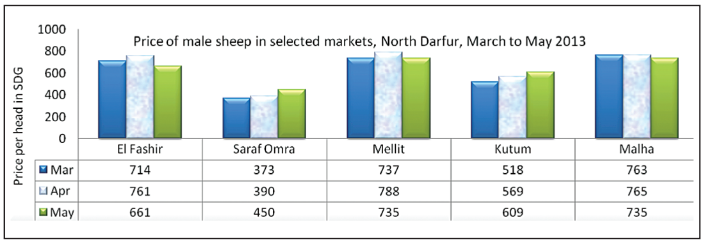

Figure 7: Price of male sheep in selected markets in North Darfur, March to May 2013

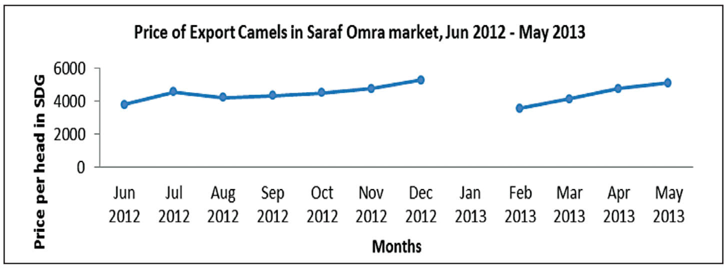

Figure 9: Price of export camels in Saraf Omra Market, June 2012 – May 2013

Transportation: Access and Costs

There have been no changes in the main trade routes in North Darfur during the quarter, and transport costs on a number of routes have actually fallen compared with the previous quarter. See Table 2. This indicates greater stability between March and May 2013, including along the main trade route connecting El Fashir, Kutum, Kebkabiya and Saraf Omra.

Table 2: Transportation costs on some of North Darfur's trade routes

Trade route	Commodity	Sep to Nov 2012 Average cost (SDG)	Dec 2012 to Feb 2013 Average cost (SDG)	Mar to May 2013 Average cost (SDG)
Kutum to El Fashir	Onions per sack - 90kg	25	30	20
Omdurman to Malha	Onions per sack - 90kg	60	72	70
Kebkabiya to El Fashir	Transportation cost per person	150	200	170

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Fruits and Vegetables

The price of onions decreased in all monitored markets in North Darfur during the quarter. See Figure 10. To some extent this is a normal seasonal trend related to the timing of the onion harvest, but it may also indicate some recovery of onion production after the Jebel Amir conflict, especially in the Saraf Omra and Kebkabiya areas, and as farmers who were engaged in opportunistic gold prospecting in Jebel Amir have returned to their farms. Nevertheless, the price of onions in 2013 is substantially higher than the price in 2011 and 2012. See Figure 11.

The price of fresh tomatoes gradually rose during the quarter in almost all monitored markets as the production season ended, with the exception of Kutum market where fresh tomatoes are produced off season through irrigation. See Figure 12. Figure 13 shows the very high seasonal variation in the price of fresh tomatoes in El Fashir market over the year; the price has been substantially higher during March to May 2013 than in the same quarter in the last two years.

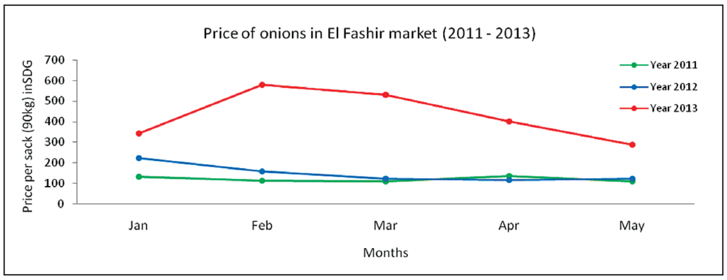

Figure 11: Price of onions in El Fashir market, January to May, in 2011, 2012 and 2013

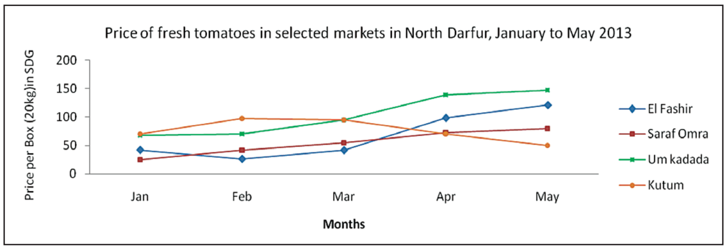

Figure 12: Price of fresh tomatoes in four markets in North Darfur, January to May 2013

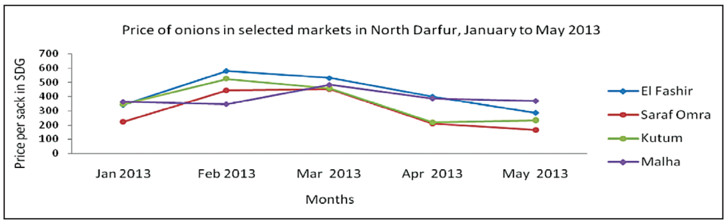

Figure 10: Price of onions in four markets in North Darfur, January to May 2013

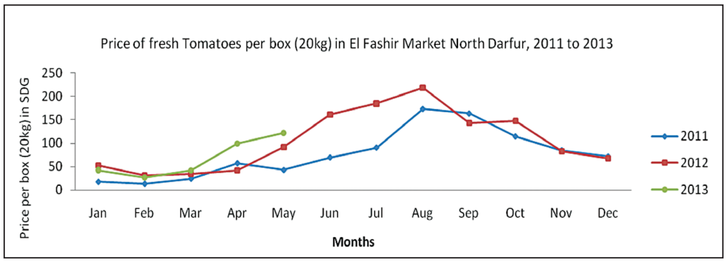

Figure 13: Price of fresh tomatoes per box (20kg) in El Fashir market in North Darfur, 2011 to 2013

Gold Prospecting and Daily Labouring

Although no new sites for gold prospecting have opened up in North Darfur during the quarter, the wage rate for daily labouring, especially for brick-making and construction, appears to have increased in some locations this quarter compared with the last six months, for example in Tawila. But this is not a uniform trend and reflects the state of the local labour market. See Table 1.

Table 1: Wage rates for daily labouring, September 2012 to May 2013

Market	Activity	Labour cost in SDG (average)		
		Sept to Nov 2012	Dec 2012 to Feb 2013	Mar to May 2013
Saraf Omra	Making 1000 red bricks	50	40	50
	Construction (per day)	30	20	20
	Daily labouring in the market	15	10	10
Zamzam	Daily labouring in the market	7	10	12
Wadda	Daily labouring — construction	15	20	20
Tawilla	Making 1000 red bricks	50	70	100
Mellit	Daily labouring — construction	10	15	15

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Cash Crops

The price of groundnuts unusually and remarkably fell during the quarter in all North Darfur's main groundnuts markets, including Al Lait, Dar Alsalam and Wada'a in the main groundnut production areas as well as in El Fashir, a major area of consumption. See Figure 14. The reason appears to be the very high production in 2012, beyond the capacity of the market to absorb this increase in production, and Sudan has a limited export trade in groundnuts. At the same time the price of sesame, for which Sudan has a much more buoyant export trade, increased during the quarter. See Figure 15.

Despite the poor tombac harvest in 2012/13, the price of dry tombac has been relatively stable. See Figure 16. As negotiations continue between the governments of Sudan and South Sudan tombac traders anticipate a resumption of the tombac trade from North Darfur to South Sudan. Other cash crops such as dry tomato and dry okra showed a small increase in price during the quarter.

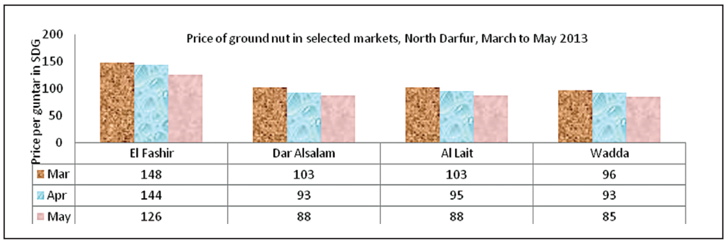

Figure 14: Price of groundnuts in selected markets in North Darfur, March to May 2013

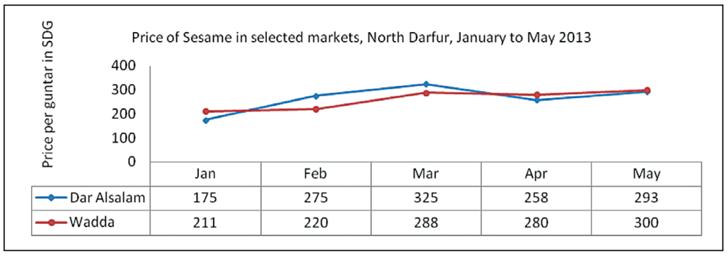

Figure 15: Price of sesame in two markets in North Darfur, January to May 2013

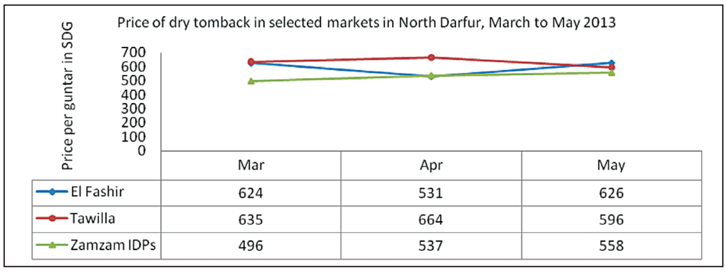

Figure 16: Price of dry tombac in selected markets in North Darfur, March to May 2013.

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. Seven CBOs plus DRA are monitoring 15 markets across North Darfur, including three 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.

Feinstein International Center

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UNEP United Nations Environment Programme

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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