# Trade and Market Bulletin
## North Darfur

## Darfur Development and Reconstruction Agency

Covering the Quarter September to November 2013 • Vol. 3, No. 4 • www.dra-sudan.org • mzakaria065@gmail.com

## Headlines

- Although it is harvest time, during this quarter cereal prices were unusually increasing in all monitored markets in North Darfur. This is probably due to the poor harvest season and the appearance of pests (locusts and birds) in some areas. The highest millet prices were reported in areas where pest infestation was worst: Um Kadada and El Lait markets. Saraf Omra market registered the lowest price. The food voucher scheme in North Darfur may have contributed to pushing prices up.
- Livestock prices during the quarter were mostly stable, with some increase in sheep prices in October, the month of Eid Aladha.
- The price of dry tombac increased in almost all the traditional markets in North Darfur due to the poor harvest this season after a lack of rainfall. The prospect of resuming trade between Sudan and South Sudan also encouraged prices to rise.
- Although the level of groundnut production this season is clearly much lower than the last season, prices remained stable in most of the monitored markets.
- The price of dried okra and dried tomatoes rose sharply compared to the last quarter, and are higher than the same quarter last year. This is at least partially due to the poor rainy season this year.
- Onion prices continued to increase seasonally in all monitored markets. The price of fresh tomatoes started to decline in most markets as is usual at this time of year, which is harvest time.
- During this quarter the trade route from El Fashir through Kutum and Kebkabiya to Saraf Omra slightly changed. Kutum to Kebkabiya was closed because of insecurity, so a detour was in place from Kutum to Abu Gamra, and then to Kebkabiya and Saraf Omra. The Omdurman to Nyala route via Ed Daein reopened as there was a reduction in localised conflict.
- Despite the fragile harvest season agricultural activities were the main source of daily labouring, along with traditional chores such as brick making and construction.

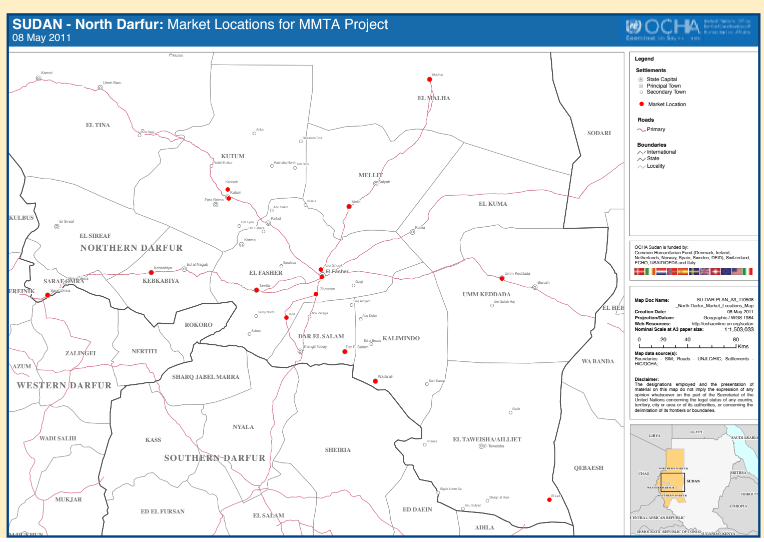
## Recommendations

- Close monitoring of household food security is strongly recommended because of the rapidly rising cereal prices across North Darfur. This is especially important in chronically food-insecure areas, such as Malha, to identify if/ where emergency support is required.
- The impact of the food voucher scheme on cereal markets should be carefully monitored in the coming months because of the poor harvest and rapidly rising millet prices.

### 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 |

This project is funded by the European Union



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## Cereals

Cereal prices have increased in almost all the 15 monitored markets across North Darfur State this quarter. This is a result of the poor harvest season and the appearance of pests (locusts and birds) in some areas. The highest millet prices were reported in areas where pest infestation was worst: Um Kadada and El Lait markets. Saraf Omra market registered the lowest millet prices, and the average millet price during the quarter was SDG 317 per sack. See Figure 1. The food voucher scheme may have contributed to the increased price of millet as it became one of the food voucher items, particularly in Saraf Omra, Kebkabiya and Abu Shook. Traders appear to be buying millet from local markets and storing it to meet the needs of the scheme. See Figure 2 for millet price trends in Saraf Omra market, an area of production, and Figure 3 for millet price trends in El Fashir market, an area of consumption, from 2011-2013. The data from El Fashir shows stable cereal prices from January to September 2013, but then a rise because of the poor harvest this season.

The terms of trade between cereals (a sack of millet) and livestock (a male goat) have continued to fall in some monitored markets (Um Kadada and Kutum). See Figure 4. They have also started to fall in other markets that reported stable or improving terms of trade in the last quarter, such as El Fashir, as cereal prices rise and livestock prices fall or remain stable. The terms of trade in Malha have stabilized, probably because of WFP food distribution in the area at the end of October 2013.

During this quarter the terms of trade started to fall in all the four markets where terms of trade have regularly been analysed. This is an unusual situation and a concerning indicator of deteriorating food security.

The price of food aid sorghum has started increasing in most of the monitored markets following the trend in millet prices, as some households switch to consumption of sorghum instead of millet because of the poor harvest. This is in addition to it being used as fodder for animals in some areas. See Figure 5.

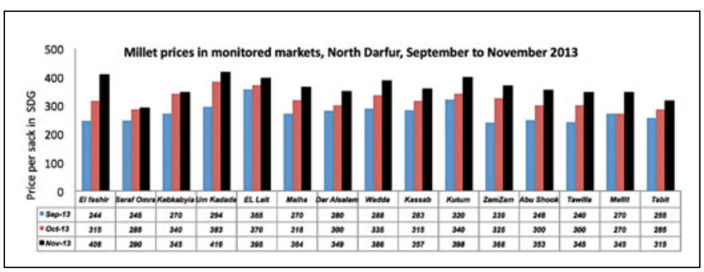


*Figure 1: Millet prices in monitored markets, North Darfur, September to November 2013*

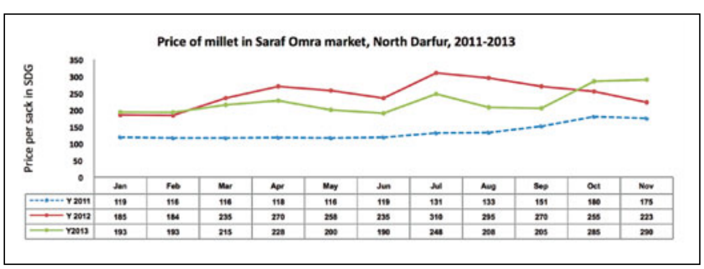


*Figure 2: Millet price trends in Saraf Omra market, North Darfur, 2011-2013*

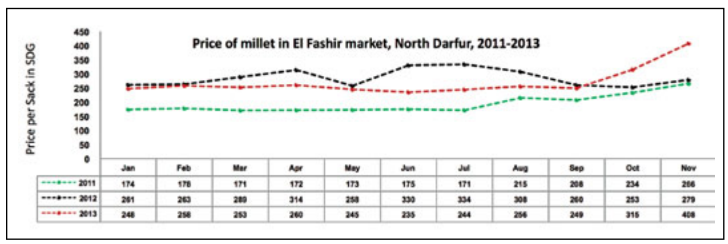


*Figure 3: Millet price trends in El Fashir market, North Darfur, 2011-2013*

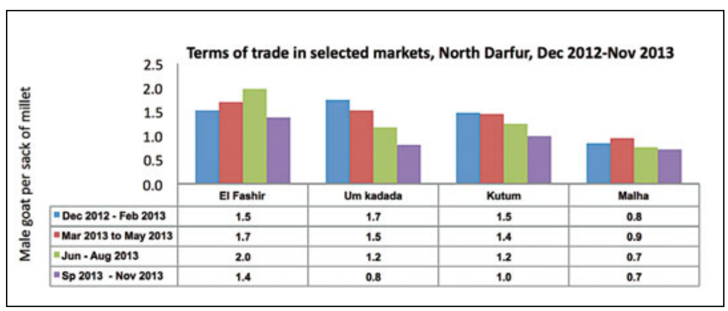


*Figure 4: Terms of trade (male goat per sack of millet) in selected markets, North Darfur, Dec 2012-Nov 2013*

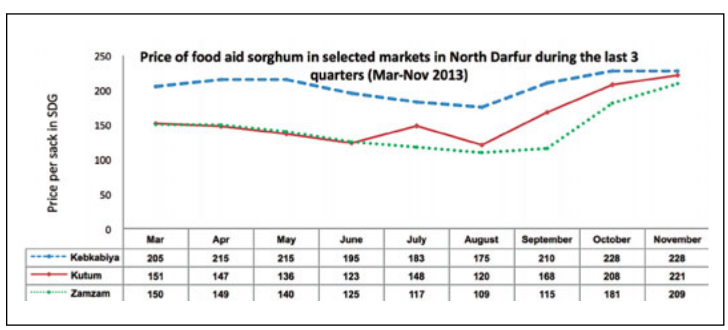


*Figure 5: Price of food aid sorghum in selected markets in North Darfur during the last 3 quarters (Mar-Nov 2013)*

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## Livestock

Generally livestock prices have remained fairly stable this quarter in most of the monitored markets. However there was a slight increase in the price of sheep and male goats in October due to Eid Aladha. See Figure 6. Falls in livestock prices, for sheep and goats in particular, may be explained by the poor harvest this season: in such circumstances people sell some of their livestock to raise income to meet their cereal requirements. However this does not seem to be the case in Malha, where the price of sheep has held up so far. Again see Figure 6.

The price of export camels in North Darfur has increased since the rainy season in Saraf Omra, and is fairly stable in Mellit. See Figure 7. The price of cattle this quarter remained stable in most of the monitored markets. See Figure 8.

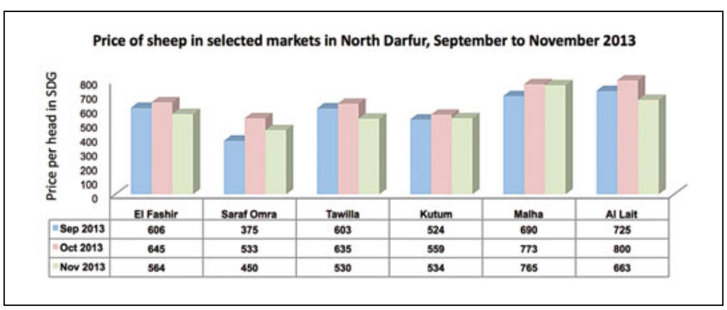


*Figure 6: Price of male sheep in selected markets in North Darfur, September to November 2013*

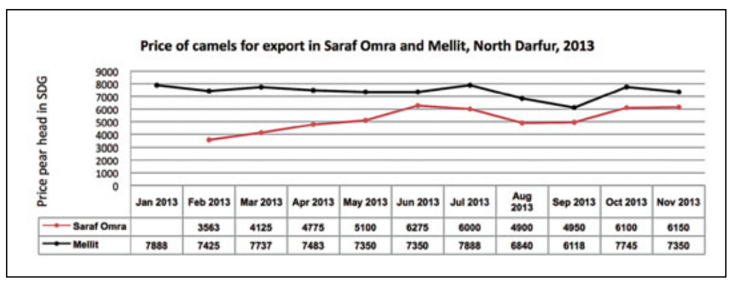


*Figure 7: Price of camels for export in Saraf Omra and Mellit, North Darfur, during 2013*

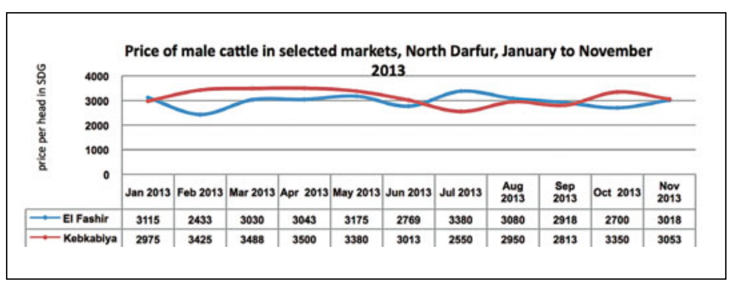


*Figure 8: Price of male cattle in selected markets in North Darfur, January to November 2013*

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## Cash Crops

There was an increase in the price of dry tombac across North Darfur's main tombac markets during this quarter. See Figure 9. Tombac production relies on the flow of water in the *wadis*. The rains this season were very short and there was therefore a shortage of water which inhibited production and pushed up the price of tombac. This is in addition to the prospect of trade resuming between Sudan and South Sudan.

Despite being a poor harvest season the price of groundnuts this quarter was quite stable in the main markets, for example Al Lait, Dar Alsalam (both production areas) and El Fashir (a consumption area). See Figure 10. This could be because production was possible in some parts of North Darfur, and there are still groundnuts in storage from the 2012 agricultural season.

Prices of dried okra and dried tomatoes abnormally increased in almost all monitored markets. See Figure 11. This reflects the late start and early finish of the rainy season. In El Fashir market the price of dried okra per guntar increased by 137% this quarter. See Figure 12. There are reports of pests affecting tomato production in Jabal Marra, the main production area in Darfur. Figure 13 shows the increase in price of dried tomatoes in El Fashir compared with the same quarter in previous years.

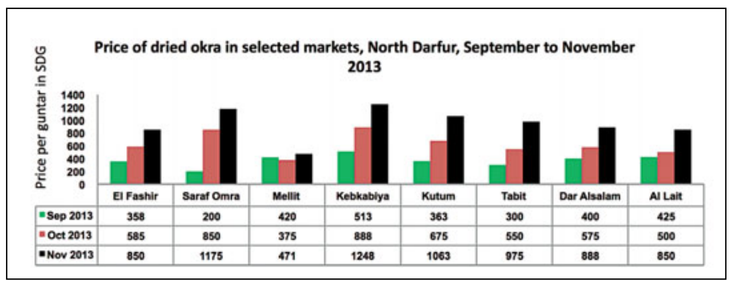


*Figure 11: Price of dried okra in selected markets, North Darfur, September to November 2013*

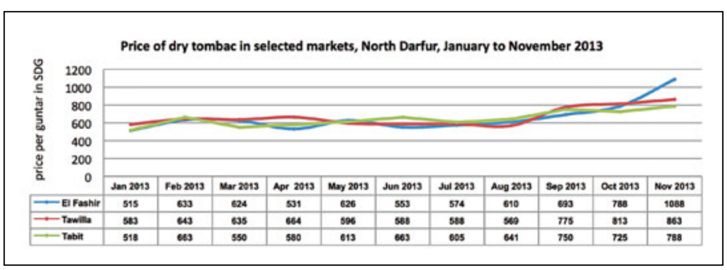


*Figure 9: Price of dry tombac in selected markets, North Darfur, January to November 2013*

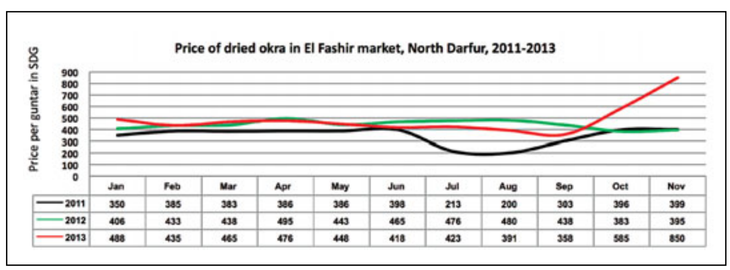


*Figure 12: Price of dried okra in El Fashir market, North Darfur, 2011-2013*

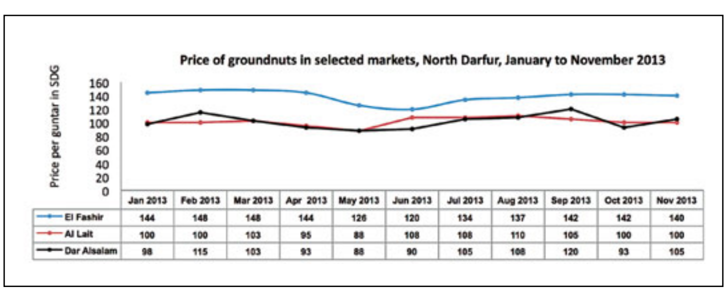


*Figure 10: Price of groundnuts in selected markets, North Darfur, January to November 2013*

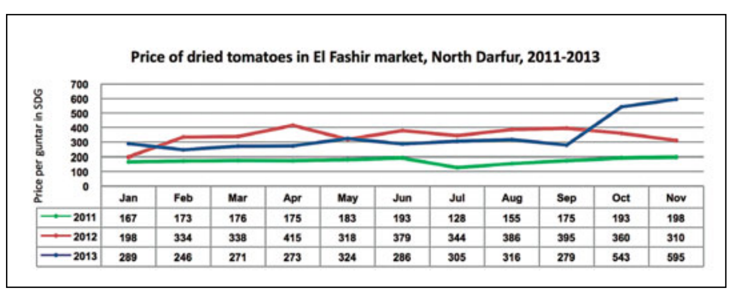


*Figure 13: Price of dried tomatoes in El Fashir market, North Darfur, 2011-2013*

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## Fruits and Vegetables

Onion prices rose in all 15 monitored markets during the quarter, which reflects the off season. See Figure 14 for the prices in Kutum and Saraf Omra (both areas of production) and the prices in El Fashir (an area of consumption). Prices for fresh tomatoes fell sharply over the quarter as production and availability increased. See Figure 15.

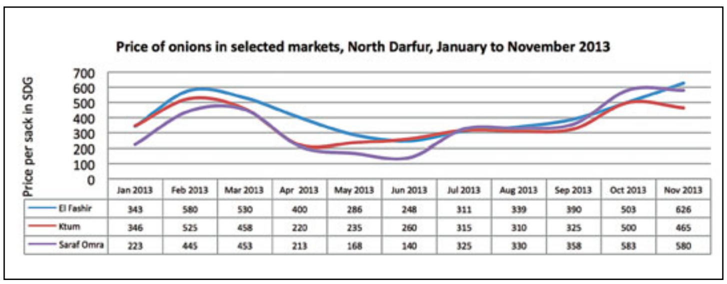


*Figure 14: Price of onions in selected markets, North Darfur, January to November 2013*

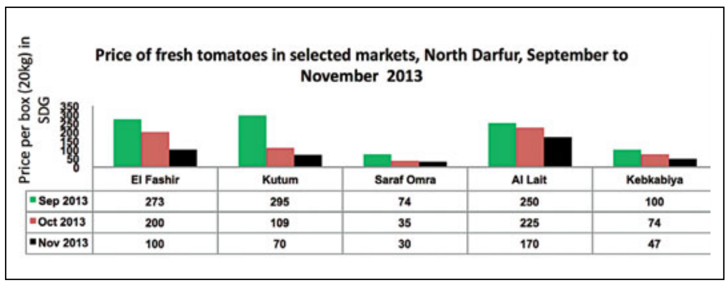


*Figure 15: Price of fresh tomatoes in selected markets, North Darfur, September to November 2013*

## Daily Labouring

During this quarter there has been a general increase in the wage paid to daily labourers, which partly reflects the impact of inflation. Agricultural activities were the main source of daily labouring opportunities along with activities such as construction and brick-making. See Table 1.

*Table 1: Local labour costs*

| Market | Activity | Average daily wage in SDG | | |
|---|---|---|---|---|
| | | **Mar – May 2013** | **Jun – Aug 2013** | **Sep – Nov 2013** |
| Saraf Omra | Making 1000 red bricks | 50 | 50 | 70 |
| | Construction (per day) | 20 | 25 | 25-30 |
| | Daily labour (market activities, per day) | 10 | 10 | 10-15 |
| Zamzam | Daily labour (market activities, per day) | 12 | 15 | 15-20 |
| Waddaa | Construction (per day) | 20 | 30 | 35 |
| Tawilla | Making 1000 red bricks | 100 | 100 | 100 |
| Mellit | Construction (per day) | 15 | 15 | 20 |

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## Transportation: Access and Costs

During the quarter the trade route from El Fashir through Kutum and Kebkabiya to Saraf Omra changed slightly. Kutum to Kebkabiya was closed because of insecurity, so a detour was in place from Kutum to Abu Gamra, and then to Kebkabiya and Saraf Omra. This increased transportation costs. The Omdurman to Nyala route via Ed Daein reopened as there was a reduction in localized conflict.

Most markets reported an increase in transportation costs, associated with increasing fuel costs and inflation. See Table 2.

*Table 2: Transportation costs*

| Trade route | Commodity | Mar – May 2013 Average cost (SDG) | Jun – Aug 2013 Average cost (SDG) | Sep – Nov 2013 Average cost (SDG) |
|---|---|---|---|---|
| Kutum to El Fashir | Onions per sack - 90kg | 20 | 30 | 40 |
| Omdurman to Malha | Onions per sack - 90kg | 70 | 75 | 100 |
| Kebkabiya to El Fashir | Transportation cost per person | 170 | 200 | 250 |

## 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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**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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