



Headlines:

- Scarce supplies in the face of high local demand pushed up **cereal prices** in most monitored markets this quarter. The cross-border flow of cereals from the Republic of Chad was disrupted by flowing *wadis*, and this pushed up prices in El Geneina by 31% compared to last quarter. In Forobaranga the price of locally-produced sorghum decreased as demand for sorghum for fodder fell as green grass became available, and as food aid was distributed to flood-affected households.
- Trends in **livestock prices** varied from one market to another, although sheep prices increased slightly in some monitored markets this quarter, because of demand for sheep for Eid al-Adha within Sudan and the expectation of demand from Saudi Arabia.
- **Cattle prices** were stable or fell in most monitored markets this quarter reflecting the availability of cattle yet poor local demand. The quarterly average price decreased by 5% in El Geneina market. But the quarterly average price increased by 13% in Forobaranga market, due to the presence of Omdurman traders as mentioned in the last bulletin.
- In terms of **cash crops**, the price of groundnuts, cooking oil and groundnut cake all increased this quarter, reflecting the limited supply of groundnuts. Dried tomato and dried okra prices were high in most monitored markets as this is the off-season.
- For **fruit and vegetables**, onion prices increased sharply this quarter reflecting seasonal trends. Fresh tomatoes were not available in many monitored markets as this is the off-season. Orange prices rose in areas of consumption such as Forobaranga and Seleia, and fell in markets accessible to areas of production, such as El Geneina and Mornei.
- Heavy rainfall in August caused some damage to Mornei Bridge on the El Ingaz road. This caused a one-week delay for trucks using the route from Nyala through Kass, Zalingei, Mornei and El Geneina. On the Kulbus trade route, the transportation cost per sack increased by 50% this quarter. It is now permitted to transport fuel to Kulbus, which is indicative of improved security.
- During this quarter most daily labouring was in agricultural operations, especially planting, weeding and ploughing, for which the payment was SDG 250 to SDG 300 per *mukhamis*.

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 plus DRA are monitoring 11 markets across West Darfur, including two 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.

Participating CBOs and the markets they monitor

El Massar Organization for Nomad Development and Environment Conservation (MONEC) [El Geneina, Kerenik and Habila]

Pioneers of Peace and Development Organization (PPDO) [Mornei and Kirinding IDP camp]

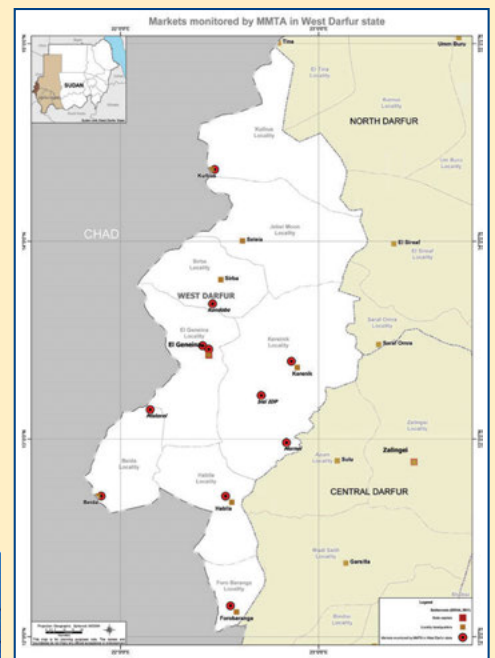
Community Development Association (CDA) [Foro Baranga and Kondobe]

Beida Organization for Relief and Development (BORD) [Beida and Misterei]

Sarabeel Organization for Services and Development (SOSD) [Kulbus]

Darfur Development and Reconstruction Agency (DRA) [El Geneina and Sisi IDP camp]

Siyaj Charity Organisation (SCO)





Cereals

Quarterly average cereal prices this quarter (June to August 2014) exceeded quarterly average prices last quarter (March to May 2014) in almost all monitored markets in West Darfur, largely because of a lack of supply linked to dwindling cereal stocks at this time of year. Additionally some trade routes were closed due to heavy rainfall and flowing *wadis* in August, which negatively impacted trade flows, both within the state and cross-border from Chad.

While supplies were constrained, there was persistently high demand. As a result, in El Geneina (a high consumption area) the quarterly average price of millet rose by 25% and the quarterly average price of local sorghum rose by 31% compared to last quarter. However, the highest quarterly average price rise for millet was reported in Foro baran ga market (a cash-crop producing area) at 49%, which is a reflection of the temporary disruption to trade routes caused by heavy rainfall and flooding in August. See Figure 1. The lowest quarterly average price rise for millet was registered in Seleia market, a major area of cereal production, at 21% higher than last quarter.

Although quarterly average prices this quarter exceeded those of last quarter the overall pattern in cereal prices this quarter was one of variation between markets. In some markets, such as Kondobe and Seleia, prices showed a downward trend, particularly in August, as the good rains fuelled expectations of a promising harvest. Other markets showed an upward trend due to scarcity of supply, such as Habila, Abu Zar IDP camp, and Kulbus. Prices in other markets fluctuated, such as in El Geneina, Kereinik, Foro baran ga, Beida, Misterei and Sisi. This time last year (August 2013) cereal prices were still rising quite steeply, whereas this year (August 2014) price trends are mixed¹.

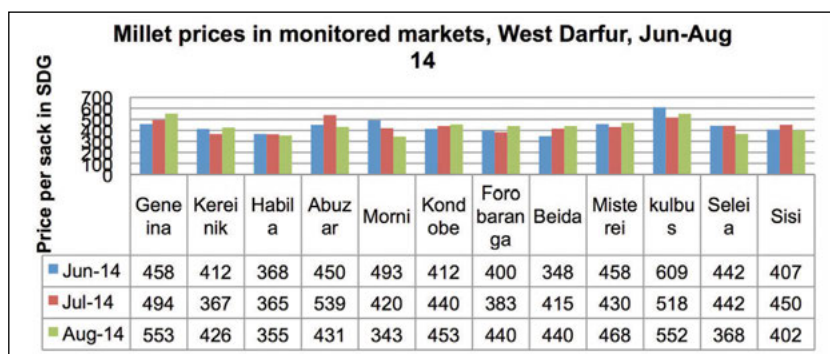


Figure 1: Millet prices in monitored markets in West Darfur, June to August 2014.

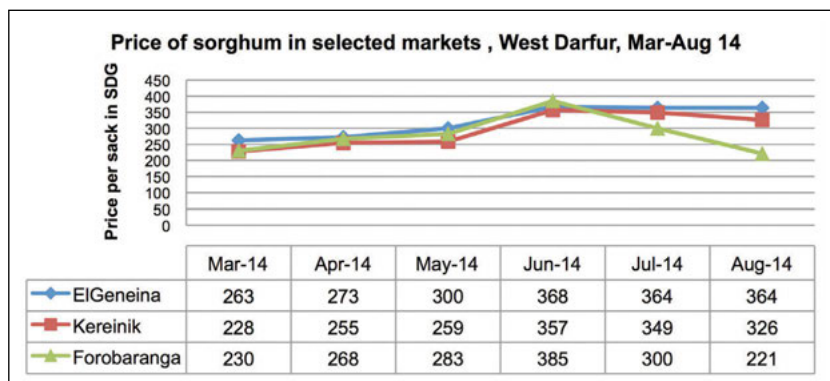


Figure 2: Price of sorghum in selected markets in West Darfur, March to August 2014

Food aid sorghum in various forms was distributed this quarter: free food aid sorghum was distributed in the IDP camps (Abu Zar, Sisi, Mornei and Foro baran ga); food aid sorghum for people affected by floods was provided in Foro baran ga; food aid sorghum for voluntary returns was distributed in Misterei; food-for-work was implemented in Habila, Beida and Seleia. These distributions had an impact on prices. For example, prices fell in Foro baran ga where food aid sorghum was distributed to people affected by floods, and sorghum is widely cultivated at the household level. Additionally, there was less demand for sorghum as livestock fodder this quarter because of the availability of green grass. Both these factors pushed prices down, in Foro baran ga in particular. See Figure 2.

¹ Bulletin version covering June to August 2013; Vol.2, No.2



Livestock

Livestock prices this quarter varied between markets depending on livestock movement. Normally during June and July herders move their livestock southwards in search of new pastures before returning northward in August to follow the rains. This shifting of herds from one place to another is the likely cause of price fluctuations: as livestock gather around markets, supply increases and prices fall, as was the case in El Geneina this quarter; once livestock move away and supply reduces, prices rise again. Typically during this quarter, particularly in June and July, animals lose weight as the dry grass runs out but the newly grown grass is not yet sufficient to meet their needs. Therefore the quality of the animals declines and prices dip. The exceptions to this are animals raised in dairies or zero-grazed around the main towns. However these forms of livestock husbandry are expensive and represent only a small proportion of livestock.

The price of male sheep rose slightly in high consumption markets, such as El Geneina, Forobaranga and Kereinik, because of increased demand for meat for Eid Al Adha, as well as the expectation that Saudi Arabia would import sheep from Sudan for Eid Al Adha. See Figure 3.

Cattle prices in most monitored markets followed a similar pattern to last quarter (i.e. prices fell in some markets but remained stable in others). Forobaranga (a major production area) was an exception to this, and the quarterly average price here rose by 13% compared to last quarter due to the presence of traders

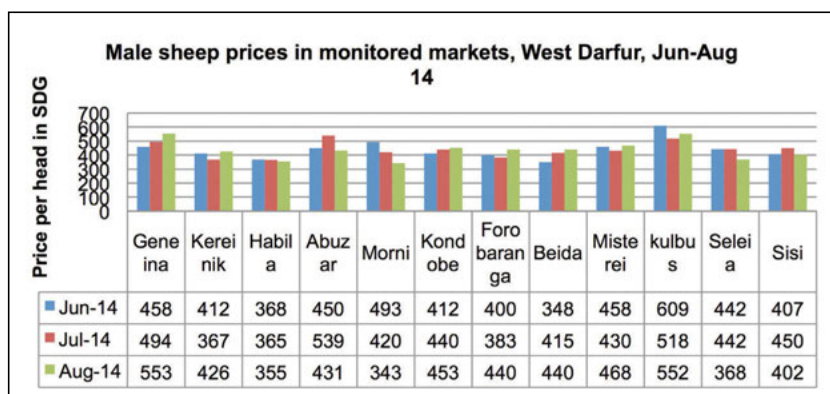


Figure 3: Price of male sheep in monitored markets, West Darfur, June to August 2014.

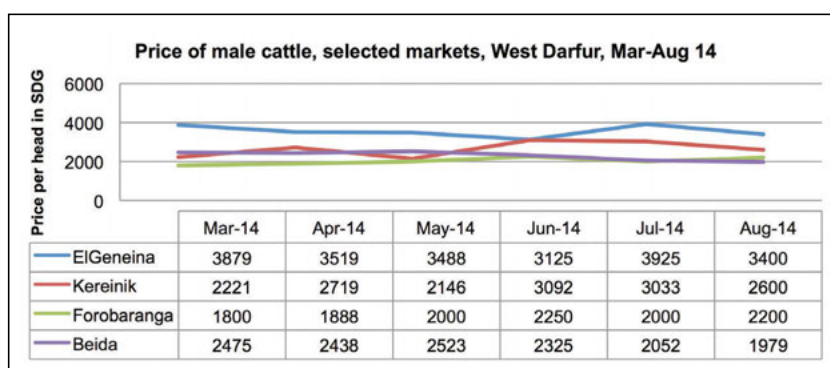


Figure 4: Price of male cattle in selected markets in West Darfur, March to August 2014.

buying for the Omdurman market. See Figure 4. Furthermore, Forobaranga market was severely affected by heavy rainfall and flooding during August, which disrupted most trade routes and restricted supply.

Camels for export were not available in Forobaranga market because of migration towards the north.



Cash Crops

Gum arabic, sesame and *karkadi* (hibiscus) were unavailable across the monitored markets this quarter, which is normal for this time of year, the peak of the off-season. Groundnuts, dried okra and dried tomatoes, on the other hand, were available in almost all monitored markets. However, there were no available data on groundnuts for Habila, suggesting that only small quantities (*kora*) of groundnuts were being sold, if any. Elsewhere, groundnut prices increased again since last quarter because of a continued lack of supply due to the poor harvest last year and seasonality. The exception to this was Kondobe in July, where prices noticeably fell as few traders came to the market to buy groundnuts.

In El Geneina market the quarterly average price of groundnuts rose by 86% compared to last quarter, while groundnut cooking oil increased by 14% per jerry-can (36lbs), from SDG 395 to SDG 450. See Figure 5. It was a similar situation for groundnut cake. Interestingly, groundnut prices in Misterei, a major production area, were particularly high in August. Stock in production areas often runs out towards the end of the season, whereas in urban or hub markets like El Geneina, some stock is usually stored by traders in expectation of higher prices when stocks dwindle. See Figure 6.

Dried tomatoes and dried okra both recorded high prices in most monitored markets this quarter, as the off-season approached and stocks ran low. Some markets showed stable or even decreasing prices, particularly for dried okra, owing to the appearance of some alternatives, e.g. fresh okra (lady's finger) and other wild vegetables such as *mulokhya*.

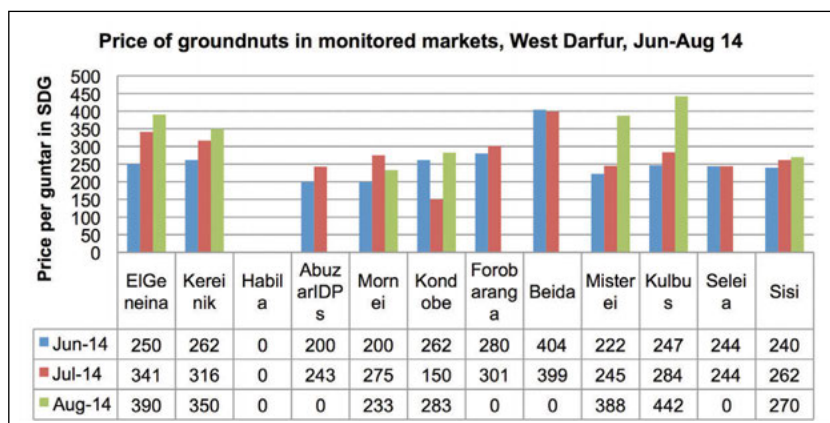


Figure 5: Price of groundnuts in monitored markets, West Darfur, June to August 2014

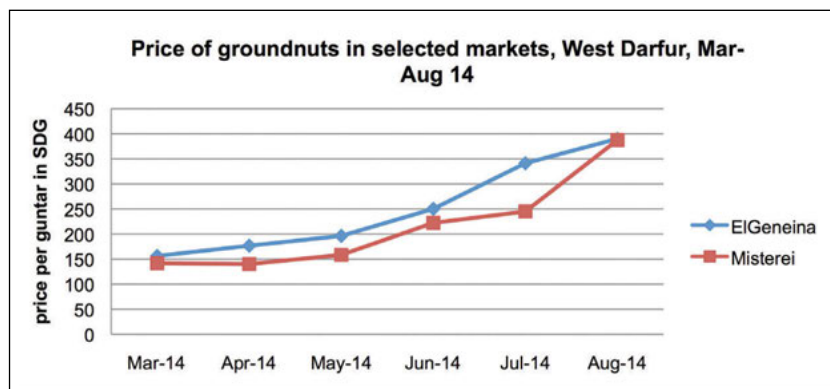


Figure 6: Price of groundnuts in selected markets, West Darfur, March to August 2014

Transportation: Access and Costs

The newly paved trade route that connects Zalingei with El Geneina via Mornei, as part of the El Ingaz Algarbi trade route, was closed for one week because of flood damage to the Mornei Bridge, which lies almost equidistant between El Geneina and Zalingei. This is the major trade route from Central Sudan to West Darfur, through Nuhud to Nyala, Kass, Zalingei, Mornei and El Geneina. This closure negatively affected trading in El Geneina which, as the state capital, is a transport hub to other markets.

There was no significant change on the Kulbus trade route, except that transportation costs per 90 kg sack increased by 50%, from SDG 40 to SDG 80, between May and August 2014. This increase was due to heavy rainfall and the effect this had on the unpaved roads. The previous restriction of not allowing fuel (gasoline and benzene) to be transported to Kulbus was lifted by the same authorities that put it in place, which is indicative of improved security.

In this quarter the Forobaranga-El Geneina trade route through Habila and Gokar, which is the main route for livestock, particularly cattle, changed to pass through Habila and Mornei to El Geneina. This change is normal at this time of year because of the availability of water for the animals due to the rains. Also, this route is deemed safer than the route used in the dry season.



The table below presents transportation costs from Omdurman to El Geneina during this quarter and the previous quarter. Interestingly, it shows a downward rather than upward trend in truck rental rates in July and August, despite this being the rainy season. This reflects the improvement of the El Ingaz Algarbi trade route, which now reaches North Darfur as a paved road. See Table 1. Truck rental rates were 25% lower than they were this time last year due to improvements in this route: they have fallen from SDG 70,670 in August 2013 to SDG 45,000 in August 2014.

Table 1: Transportation costs, Omdurman to El Geneina.

Cost items	Mar	Apr	May	June	July	Aug
1 Truck rent from El Geneina to Omdurman	55,000	60,000	60,000	60,000	55,000	45,000
2 Manifesto tax	2,100	2,100	2,100	2,100	2,100	2,100
3 Businesses profit tax	1,100	1,100	1,100	1,100	1,100	1,100
4 Value added tax	1,000	1,000	1,000	1,000	1,000	1,000
5 Sudanese meteorology and standards	200	200	200	200	200	200
6 State Ministry of Finance fees	3,000	2,500	3,000	3,000	3,000	3,000
7 Taxation paid to consumer	1,400	1,400	1,400	1,400	1,400	1,400
8 Locality fees	10	10	10	10	10	10
9 Departure fees	87	87	87	87	87	87
10 Check point fees- Nyala to El Geneina	750	700	700	700	700	700
11 Expenditures route form Omdurman to El Geneina	3,000	3,000	3,000	3,000	3,000	3,000
12 Ed Dain Bursa fees	250	250	250	250	250	250
13 Nyala Bursa fees	450	450	450	450	450	450
14 Zalingei Bursa fees	300	300	300	0	0	0
15 Convoy fees paid for security	950	950	950	950	950	950
Total costs	69,597	74,047	74,547	74,247	69,247	59,247

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Fruits and Vegetables

Fruit and vegetable prices shot up this quarter in most monitored markets because many were out of season. Onion prices, for example, rose sharply in all monitored markets because of seasonality, which was aggravated by the temporary blocking of some trade routes due to heavy rainfall and the flow of *wadis*. See Figures 7 and 8. Fresh tomatoes were not reported in as many monitored markets as last quarter, for the same reasons as onions, and were unavailable in July in El Geneina and in August in Mornei. See Figure 9. In terms of fruit, oranges became available in most monitored markets. The lowest orange prices were registered in those markets accessible from production areas, e.g. El Geneina and Mornei, along a paved route. Prices were higher in consumption markets with no direct links to production areas, e.g. Seleia and Forobaranga, due to increased transportation costs. Mangoes were unavailable everywhere as they are now out of season.

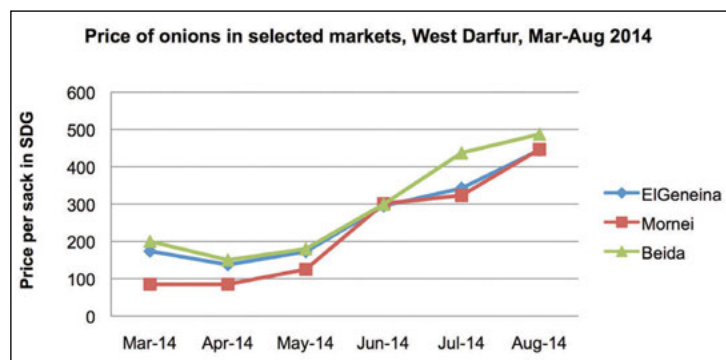


Figure 8: Onion prices in selected markets, West Darfur, March to August 2014

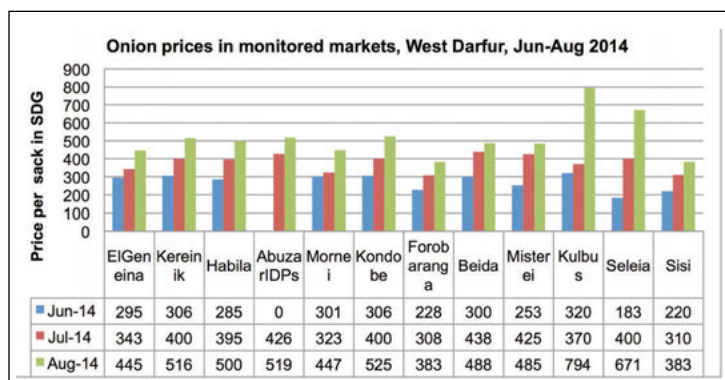


Figure 7: Onion prices in monitored markets, West Darfur, June to August 2014

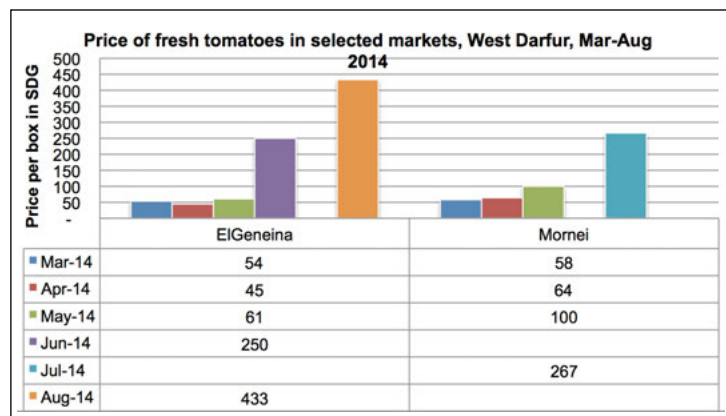


Figure 9: Price of fresh tomatoes in selected markets, West Darfur, March to August 2014

Daily Labouring

Usually during this quarter most people switch from traditional jobs, such as brick-making and construction, to agricultural operations, for which wage rates are higher, as the rainy season

begins. The average labour cost to prepare one *mukhamis* for cultivation, which typically takes 3 days, was SDG 200-300, translating into a daily rate that ranges from SDG 66 to SDG 100.



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

1. Ministry of Finance, Economy and Civil Service
2. Ministry of Agriculture, Animal and Natural Resources