

# Six-month Trade and Market Bulletin West Darfur

## Darfur Development and Reconstruction Agency

Covering March to August 2016 • [www.dra-sudan.org](http://www.dra-sudan.org) • [jamilalla@yahoo.com](mailto:jamilalla@yahoo.com)



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### Headlines:

- The stability of cereal prices in most of West Darfur's monitored markets during the six month period of March to August 2016 reflects better availability than in other Darfur states. West Darfur has supplied North and South Darfur with cereals, and some parts of eastern Chad. There has been a thriving informal cross-border trade in cereals, mostly flowing from Chad to West Darfur's border markets.
- Sheep prices increased because of high demand associated with Eid Aladha, for local consumption and for export. Sheep from West Darfur were of higher quality than elsewhere in Darfur because of good pasture. Cattle prices were stable in Forobaranga market, but increased in April in El Geneina when the source switched to Chad. The price

of camels for export was stable in Forobaranga market, although they are exported only to Egypt because of insecurity in Libya.

- Groundnut prices, dried okra and dried tomato prices were generally stable, although were each affected by seasonality.
- Onion prices gradually increased between March and August 2016, reflecting that this is the off-season.
- Orange prices in West Darfur were affected by conflict in West Jebel Marra.
- Trade routes were generally stable, but Wadis flooding during July and August temporarily blocked trade routes within and outside the state, and also the cross-border trade with Chad.

### Recommendations:

- The extreme seasonality of onions and tomatoes, in terms of availability and price fluctuations could be addressed through the improvement of storage facilities (for example cold stores) to prolong the storage life of onions and tomatoes, and through investment in agro-processing, for example drying onions, canning tomatoes and making tomato paste<sup>1</sup>.
- Groundnut production as a cash crop shows a good return in West Darfur, and should be supported, for example with improved seeds and extension support, the availability of micro-credit, and promoting the trade in groundnuts.
- There is a flourishing informal trade between Chad and Sudan in a range of agricultural commodities. Formalising and promoting this trade would be of great economic benefit to West Darfur, and to Sudan more generally<sup>2</sup>, especially if road infrastructure was improved, for example the building of bridges over Wadi Kaja.

<sup>1</sup> See also DDRA's study on the production and trade in fresh vegetables in North and West Darfur (Fadul et al, 2014) <http://www.sahel.org.uk/documents/VegetableTradeStudyReport2014.pdf>

<sup>2</sup> As recommended in the cash crop trade study, 'Taking Root'. See <http://fic.tufts.edu/publication-item/taking-root/>

### 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]

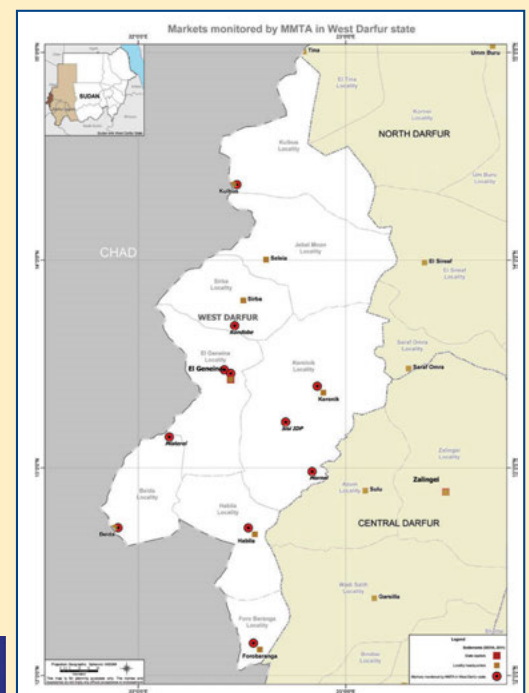
Beida Organization for Relief and Development (BORD) [Beida and Misterei]

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

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

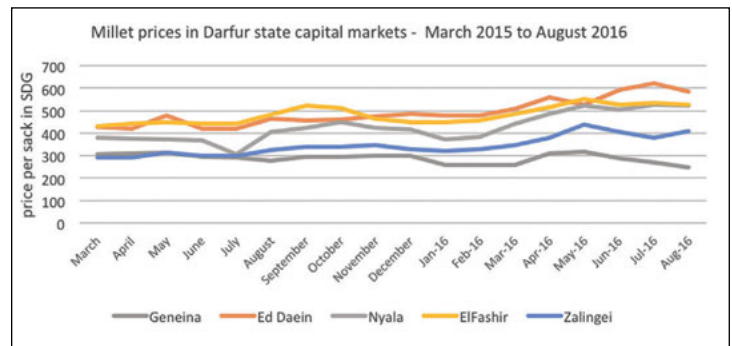


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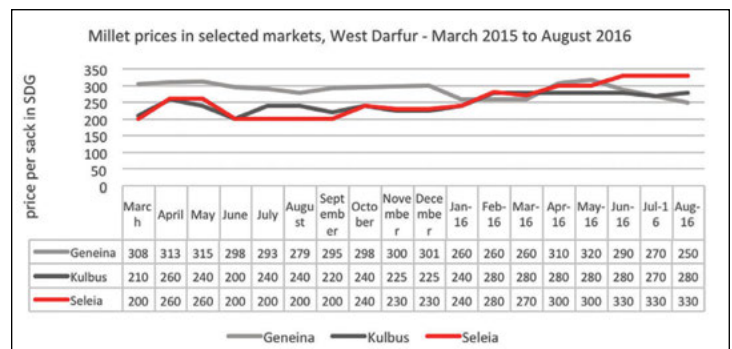
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**Figure 1 Millet prices in Darfur state capital markets - March 2015 to August 2016**

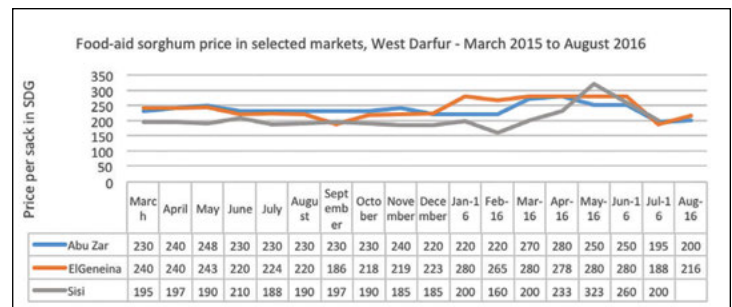
## Cereals:

Cereal production, both for West Darfur and eastern Chad, was good during the previous season (2015/2016). Markets in West Darfur had some of the lowest millet prices when compared with the other four Darfur states. See Figure 1. Thus, West Darfur has become an important source of millet to South Darfur, from Kereinik and Seleia, and to North Darfur, from Kulbus and Seleia to areas including Dar Zaghawa: Tina and Umbaro. Chad has become an important source of cereals for the border markets of Tendalti, Beida and Forobaranga. Although movement of cereals from Chad to Sudan is controlled by the Chadian authorities, the border is long and not easily patrolled. There is a flourishing informal cross-border trade in cereals using camels and donkeys for transportation. Unusually, during this six-month period of March to August 2016, Kulbus has been supplying some areas in eastern Chad with millet, to pastoralists and nomads who have been moving through the border area.



**Figure 2 Millet prices in selected markets, West Darfur - March 2015 to August 2016**

The 2016 rainy season started in early July with heavy rainfall in most production areas in West Darfur. Producers in some parts of West Darfur are concerned that production may be depressed by the very high rainfall levels with few dry spells. Some farmers have been hesitant to plant during this very wet period, and prefer to wait until the livestock have moved away from their fields, yet they are also concerned that a rainy season that starts early will also end early. There are some reports of pest infestation in some areas, including birds and grasshoppers.



**Figure 3 Food-aid sorghum prices in selected markets, West Darfur - March 2015 to August 2016**

*Cereals continued on next page*

**Table 1: The range of millet prices in selected markets, West Darfur - March to August 2016**

| Market/Price in SDG | March-16 | April-16 | May-16 | June-16 | July-16 | August-16 |
|---------------------|----------|----------|--------|---------|---------|-----------|
| Kereinik            | 304      | 370      | 370    | 329     | 367     | 380       |
| Forobaranga         | 345      | 358      | 368    | 380     | 365     | 335       |
| Mornei              | 305      | 355      | 348    | 338     | 345     | 370       |
| Kondobe             | 243      | 260      | 285    | 305     | 280     | 280       |
| Kulbus              | 280      | 280      | 280    | 280     | 270     | 280       |

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## Cereals continued

**Millet:** during March to August 2016, millet prices have fluctuated and vary from one market to another. Seleia, as a production area, usually records the lowest price in the state but since January 2016 the price of millet has gradually increased due to the high demand for millet from South and North Darfur, and purchase by the military of approximately 5000 sacks of millet for soldiers stationed in West Darfur. The price rose to SDG 330 per sack in June but then remained stable from June to August. In Geneina market, an area of consumption, the millet price gradually decreased between June and August 2016, reflecting improved availability, probably due to traders releasing stocks onto the market when it became apparent that the rainy season in 2016 was looking favourable. From March to August 2016 millet prices have been stable in Kulbus market, despite supplying pastoralists in eastern Chad. This reflects generally good availability. See Figure 2.

Kereinik, a millet producing area, registered the highest millet price in August of SDG 380 per sack, and Forobaranga, a sorghum producing area, registered the same price for millet, in June. Mornei, a sorghum producing area located on the El Ingaz Road, registered SDG 370 per sack. See Table 1. The reason for the high price in each of these markets was the same: high demand from South Darfur. Meanwhile Kondobe, another production area, registered the lowest millet price in West Darfur between March and August 2016: SDG 243 per sack.

**Sorghum:** food-aid sorghum prices were influenced by the timing of food-aid distributions by WFP. In May 2016 the market in Sisi IPD camp registered the highest price of SDG 323 per sack when there was no distribution of food-aid. The price then fell when WFP did distribute food-aid in July in Geneina, Sisi IDP camp and Abu Zar IDP camp, to SDG 188, SDG 200 and SDG 195 respectively. See Figure 3.

For local sorghum, the price rose in March, April and May in both Forobaranga (a sorghum production area), and Geneina (the biggest market for consumption), due to high demand for its use as animal fodder. In June and July the price began to fall as pasture became available with the start of the rainy season. See Figure 4.

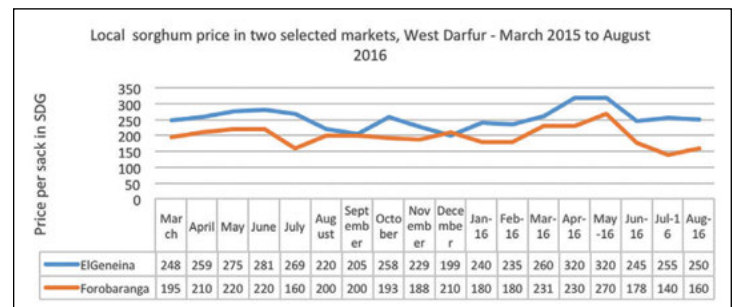


Figure 4 Local sorghum prices in two selected markets, West Darfur - March 2015 to August 2016



## Trade routes

Trade routes within West Darfur and out of the state generally functioned well during March to August 2016. But some trade routes were affected by heavy rainfall and wadis flooding. Movement between Chad and West Darfur was affected by the flooding of Wadi Kaja: there are currently no bridges along Wadi Kaja which hinders the movement of cross-border trade during the rainy season.

Transportation costs between Omdurman and Geneina have fallen since the El Ingaz Road was completed. (See the forthcoming MMTA paper on the El Ingaz Road for further information).

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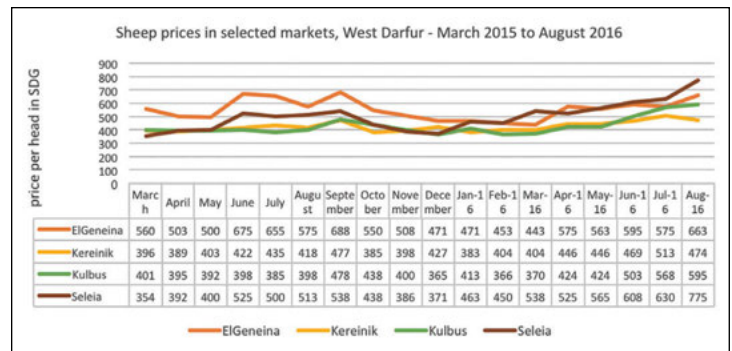


Figure 5 Sheep prices in selected markets, West Darfur - March 2015 to August 2016

## Livestock:

In West Darfur, sheep production is mostly in the northern part of the state, and cattle production is in the southern part of the state.

During the previous 18 months' **sheep** prices have fluctuated according to trading activity. The presence of sheep traders from Omdurman played a major role in increasing prices, and causing them to fall when they left the market. Between March and August 2016, when the Omdurman traders were present, the price of sheep was affected by high demand for Eid Aladha, and for export to Saudi Arabia. See Figure 5, which shows a steady rise in prices during this six-month period. The highest sheep prices ranged between SDG 600 and SDG 800. For Mornie and Seleia during June to August and Geneina, Forobaranga during July to August the prices reflected high demand for Eid Aladha. Most sheep were transported to Khartoum by truck.

The quality of sheep in West Darfur was of a higher quality than other Darfur states, attributed to the good pasture in West Darfur compared with the other Darfur states, in turn due to better rainfall.

**Cattle** prices have been relatively stable in the cattle-producing area of Forobaranga during the previous 18 months, reflecting steady supply. Geneina market was different: the price of cattle increased sharply in April when the source of supply switched from Forobaranga to Chad. Lack of water sources between Forobaranga and Geneina means this cattle trading route stops around April. Cattle from Chad are more expensive because they are larger and better quality, and because of the devaluation of the Sudanese pound against the Chadian franc. This pushed prices up through to August 2016. See Figure 6.

Overall, cattle prices peaked in Geneina market in December 2015 as a result of high demand from Omdurman traders (through their agents in Geneina). However, prices fell between January and March 2016, surprisingly, even lower than Forobaranga which is the main source of supply to Geneina.

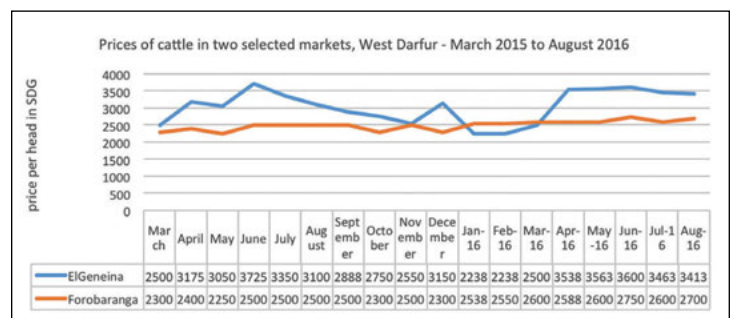


Figure 6 Price of cattle in two selected markets, West Darfur - March 2015 to August 2016

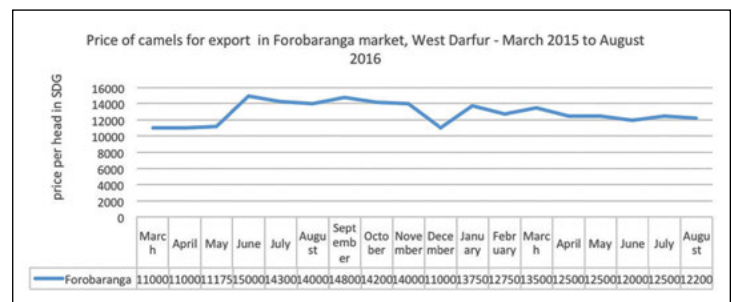


Figure 7 Price of camel export in Forobaranga market, West Darfur - March 2015 to August 2016

See Figure 6. This was as a result of agents unusually bringing cattle back to Geneina market from Omdurman to be re-sold in Geneina, apparently due to some disagreement between traders, causing a high loss to those agents who had to return them.

The price of **camels** for export was stable during the six-month period, and they were only traded in Forobaranga market in West Darfur. As in North Darfur, camels were exported to Egypt, but not to Libya because of insecurity on the Sudan-Libya border. As is usually the case, the main source of supply of camels for export was Chad. See Figure 7.

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## Cash crops:

**Groundnuts** are an important source of income to many people, especially in Beida, Kereinik and some parts of Geneina. Some groundnuts are traded from Geneina to Omdurman, and also directly from Mastrie and Beida to Omdurman. During the last 18

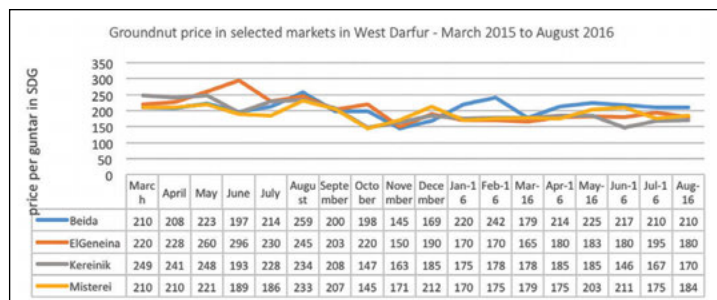


Figure 8 Price of groundnuts in selected markets, West Darfur - March 2015 to August 2016

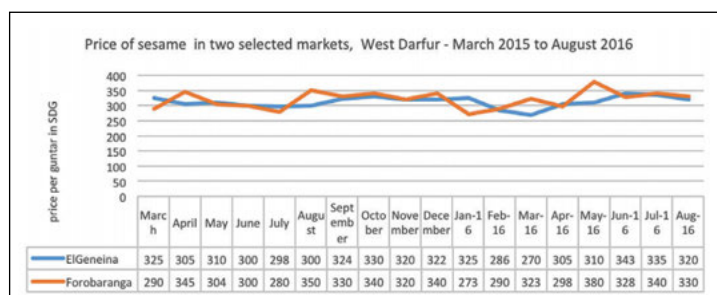


Figure 9 Price of sesame in two selected markets, West Darfur - March 2015 to August 2016

Table 2 Production costs and returns on one mukhamas of groundnuts, producing 10 guntars, in Mastrie market in West Darfur

### Expenditure:

| No  | Item                                  | Unit     | Cost per unit SDG | Total cost SDG |
|---|---------------------------------------|----------|-------------------|----------------|
| 1   | Preparation of the land (koshan)      |          |                   | 150            |
| 2   | Ploughing + planting                  |          |                   | 300            |
| 3   | Groundnuts seeds for one mukhamas     | 10 kora  | 20                | 200            |
| 4   | Weeding (1)                           |          |                   | 200            |
| 5   | Harvest (1)-from ground               |          |                   | 250            |
| 6   | Harvest (2)- cleaning from grasses    |          |                   | 200            |
| 7   | Others (zakat, locality fees, etc)    | 10       | 20 per guntar     | 200            |
| 8   | Sacks for packaging                   | 10 sacks | 05                | 50             |
| 9   | Transportation for 10 sacks to market | 10 sacks | 10                | 100            |
| Total cost for producing groundnuts on one mukhamas |                                       |          |                   | 1650           |

### Revenue in Mastrei market:

| No   | Item                                 | Unit | Unit price SDG | Total SDG |
|--|--------------------------------------|------|----------------|-----------|
| 1  | Total revenue from 10 guntar: August | 10   | 184            | 1840      |
| 2  | Total revenue from groundnut leaves  |      |                | 600       |
| Total revenue from one mukhamas producing 10 guntars |                                      |      |                | 2440      |
| Total production cost for one mukhamas               |                                      |      |                | 1650      |
| Gross profit for one mukhamas (groundnuts)           |                                      |      |                | 790       |

% gross profit for one mukhamas producing 10 guntars is 48%

Source: This data was collected by DDRA directly from farmers in Beida locality, one of the main production areas for groundnuts in West Darfur.

Cash Crops continued on next page

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## Cash crops continued

months the price of groundnuts was stable or decreased in most monitored markets in West Darfur until preparations started for the agricultural season and prices rose because of high demand from farmers for seed as well as demand for groundnut cake. See Table 2 for figures on production costs and revenue for groundnuts in Mastrie market in West Darfur in 2016, which shows a good return of 48%. Groundnuts are produced in some parts of West Darfur (as mentioned above), and also came from Chad into West Darfur's border markets. The production in East Chad, where many farmers from Sudan have fields, was very good last season 2015\16, with relatively high productivity. See Figure 8.

There is no longer large-scale agro-processing of groundnut oil in West Darfur, but instead small-scale groundnut oil agro-processing by small traders in some production areas and in Geneina town.<sup>3</sup> Obstacles to maximizing the trading potential of groundnuts include: the absence of large companies and agents that trade in groundnuts, packaging in plastic sacks instead of jute sacks which affects aflatoxin levels, lack of extension and of improved groundnut seeds for farmers, high fees for traded groundnuts at state and locality level, and competition from cheap imported cooking oil. Addressing some of these issues would promote high quality groundnut production and a more profitable trade in groundnuts.

**Sesame** prices were stable during the previous 18 months. Sesame is produced only in the south of West Darfur and demand is limited, mainly for local consumption. Forobaranga is the main production area and had a very good season during 2015/16. Most sesame traded in Forobaranga was transported directly to Omdurman where it is used in manufacturing, for example of sweets and other foodstuffs. See Figure 9.

<sup>3</sup> As noted in the cash crop trade study, 'Taking Root', groundnuts are a relatively 'conflict-resilient' crop, but sesame is not. See <http://fic.tufts.edu/publication-item/taking-root/f>

**Dried okra and dried tomato** prices fluctuated seasonally during the previous 18 months in most of West Darfur's markets. During the rainy season in July and August green okra and fresh tomatoes are produced and there is low demand for dried okra and dried tomatoes during this time. Both dried okra and dried tomatoes are produced throughout West Darfur, although sometimes dried tomatoes come from Central Darfur and Chad through Tendalti, see Figures 10 and 11. Generally prices for dried okra were higher in March to August 2016 compared with the same period in 2015, because demand was high but production in 2016 was affected by infestation of insects.

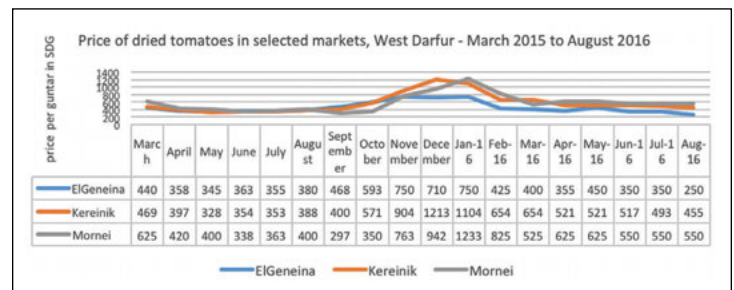


Figure 10 Price of dried tomatoes in selected markets, West Darfur - March 2015 to August 2016

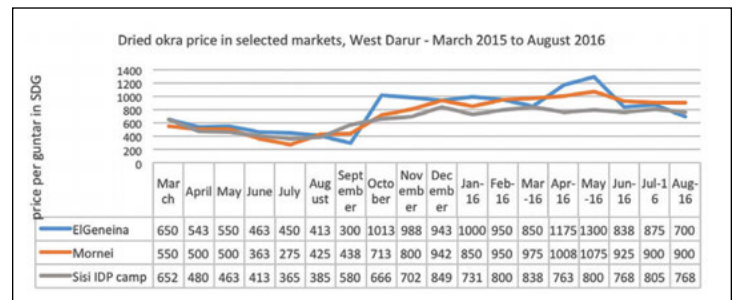


Figure 11 Price of dried okra in selected markets, West Darfur - March 2015 to August 2016

## Daily labouring

During March to August 2016, demand for daily labouring in West Darfur was mainly in construction and building (SDG 40 to 60 per person/day), agricultural operations (SDG 150 to 170 per person/day) and domestic labour (SDG 15 to 20 per person/day). Generally daily wage rates have been stable over the last 18 months.



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## Vegetables and Fruits:

The price for onions increased gradually in most monitored markets in West Darfur during March to August 2016, which is the off-season, as expected. See Figure 12.

Orange prices were affected by the conflict in West Jebel Marra, peaking in February 2016, then starting to decrease from June to the end of the reporting period, reflecting seasonal availability (August 2016). See Figure 13.

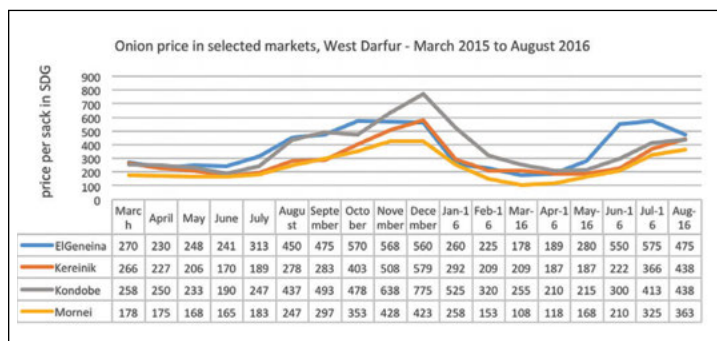


Figure 12 Price of onions in selected markets, West Darfur - March 2015 to August 2016

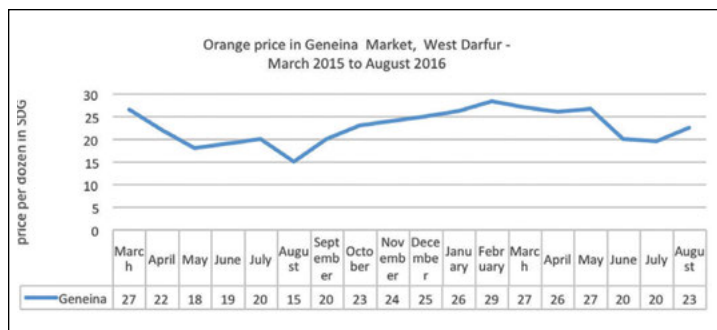


Figure 13 Orange price in Geneina market, West Darfur - March 2015 to August 2016

## 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 DDRA 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. DDRA holds six-monthly analysis workshops with the CBO enumerators.



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