



Headlines:

- **Cereal prices** continued rising in most monitored markets due to the bad harvest. The average quarterly price of millet in El Geneina market increased by 27% compared with the last quarter; in Foro Baranga market the average quarterly millet price increased by 16%; and in Seleia by 28%. The percentage rise in the average quarterly price of sorghum in El Geneina market was higher: 37% compared with the last quarter, owing to scarcity and high demand.
- **Livestock prices** were generally stable in most monitored markets in West Darfur. The exception was sheep prices in El Geneina where the price fell in March, but then increased in April and May. Possible reasons for the price rises include the seasonal movement of sheep away from the town in search of better grazing. In contrast, cattle prices decreased in El Geneina market reflecting greater availability, as cattle can be trekked from remote areas more easily than sheep. But in Foro Baranga market cattle prices rose by 11% this quarter compared with the last quarter, reflecting the presence of traders buying for the Omdurman market. Donkey and horse prices rose in most monitored markets during the quarter because of increased demand from local farmers for their farming operations.
- In terms of **cash crops**, groundnut prices increased in all monitored markets, indicative of the poor harvest season in 2014. The price of both cooking oil and groundnut cake also increased sharply. The price of dried okra and dried tomatoes remained high in most monitored markets due to the bad harvest season, as well as pest infestation affecting the availability of dried tomatoes.
- In terms of **fresh fruits and vegetables**, this quarter is the mango harvest so prices fell, but they increased for fresh tomatoes and onions as it is the off-season.
- Construction on the El Ingaz road, specifically the section connecting Zalingei with El Geneina, improved this **trade route**. The journey time between Zalingei and El Geneina was halved, from 5 hours to 2.5 hours; transport costs per bus fell from SDG 2,000 to SDG 1,800. The trade route from Omdurman to El Geneina through South Darfur was calmer this quarter, but the transport cost per truck still rose by 7%, to SDG 74,547.
- **Daily labouring opportunities** this quarter were the usual activities, such as brick-making, construction and domestic service for town inhabitants. The wage rate remained stable.

Recommendations:

- Close monitoring of household food security in West Darfur should continue as cereal prices rise.

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]

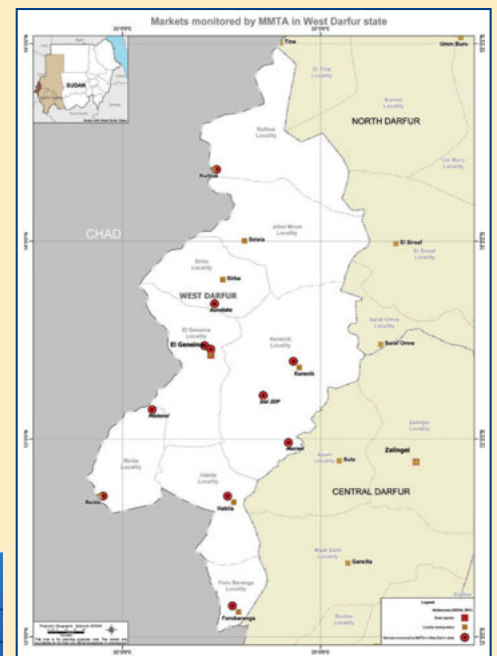
Pioneers of Peace and Development Organization (PPDO) [Mornei and Kirinding IDP camp]

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]



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Cereals

During this quarter **cereal prices** continued to rise in almost all monitored markets in the state, owing to the bad harvest season in 2014 and dwindling supplies. For example, the quarterly average price of millet rose by 27% in El Geneina (a main consumption market) compared to last quarter; by 16% in Forobaranga market (a cash crop area), which reported the highest average quarterly price across the state; and by 28% in Seleia market (a production area), which reported the lowest average quarterly price throughout the state. See Figure 1. The quarterly average price of local sorghum increased by 37% in El Geneina market compared to last quarter, and the price of food aid sorghum also rose as food aid supplies declined. Yet demand for sorghum remained high, both for human consumption (as households switch from more expensive millet to cheaper sorghum as their staple) and for livestock fodder for dairy and poultry farms around El Geneina town. See Figure 2.

As stated in the last bulletin (Vol. 2, No. 4), the Post-harvest Assessment by state government indicates that West Darfur had a cereal consumption deficit of 38%¹. This deficit has contributed to pushing up cereal prices over the last fifteen months (March 2013 to May 2014). See Figure 3. For instance, in El Geneina market the millet price in May 2014 was 76% higher than in May 2013; in Forobaranga market it was 53% higher than May 2013; and it was 77% higher in Kereinik market. Cereal prices are expected to continue soaring in the coming months.

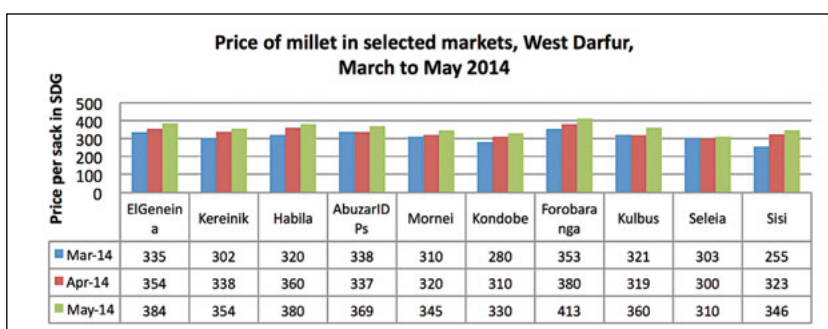


Figure 1: Price of millet in selected markets in West Darfur, March to May 2014

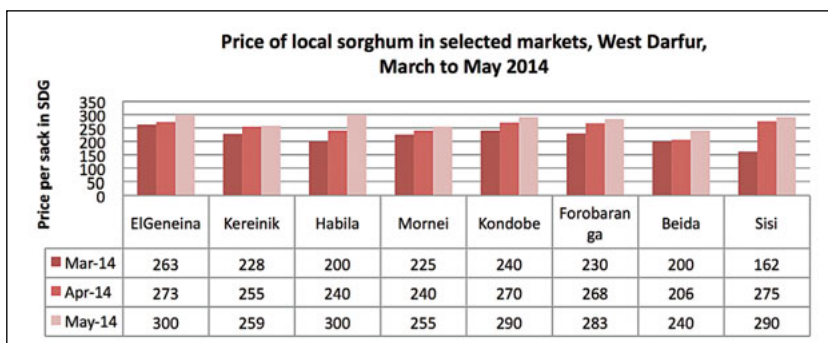


Figure 2: Price of local sorghum in selected markets in West Darfur, March to May 2014

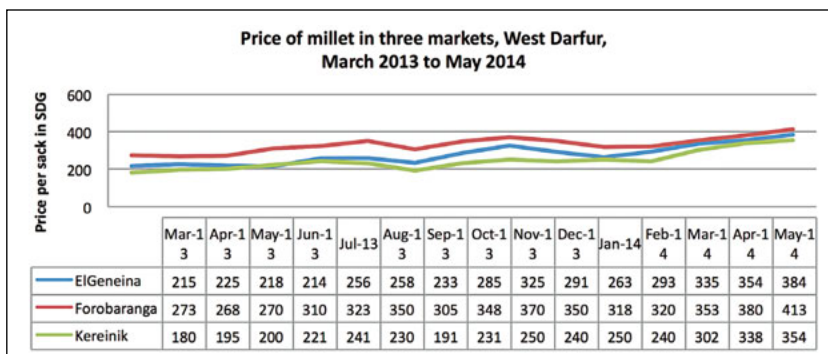


Figure 3: Price of millet in three markets in West Darfur, March 2013 to May 2014

¹ Source: Post-harvest Assessment 2013/2014, Ministry of Agriculture, Animals and Natural Resources, West Darfur

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Livestock

Generally, **livestock prices** remained stable in most monitored markets this quarter, although normally in lean years like this one, livestock prices would be expected to move in the opposite direction to cereal prices. The reason we are not seeing this pattern deserves further investigation, in particular whether households have other sources of income they are dependent on. Sheep prices in El Geneina fell in March 2014, implying an increase in supply to the market, but have risen in April and May when herds have probably been moved further from the market in search for good grazing, as is normal at this time of year. The price rise may have been influenced by insecurity in the western part of North Darfur (in the Saraf Omra, Kutum and El Sereif areas), resulting in a decrease in supply to El Geneina, although this issue deserves further investigation. See Figure 4.

In contrast cattle prices decreased a little in El Geneina market. This reflects the greater availability of cattle in the market - unlike sheep, they can trek over longer distances to come to market. Forobaranga market reported an 11% increase in cattle prices during the quarter. This was because some traders and agents of traders started to buy cattle in order to trek them to Omdurman for sale during the forthcoming rainy season. But it is worth noting that the cattle price in Forobaranga is lower this year than the same quarter in 2013, implying increased supply in 2014. See Figure 5. There has been little demand for camels for export this quarter, due to the political situation in Libya and Egypt. The price has fallen following the same seasonal trend as in 2013, although the average price this quarter is 22% higher in Forobaranga market than the average price for the same quarter in 2013. See Figure 6. The price of donkeys and horses rose in most monitored markets during this quarter, in preparation for the forthcoming agricultural season as they are used in agricultural operations. See Figures 7 and 8.

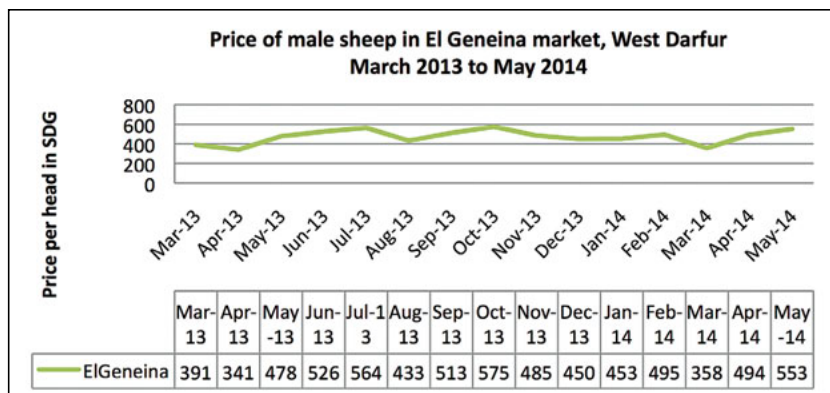


Figure 4: Price of male sheep in El Geneina market, West Darfur, March 2013 to May 2014

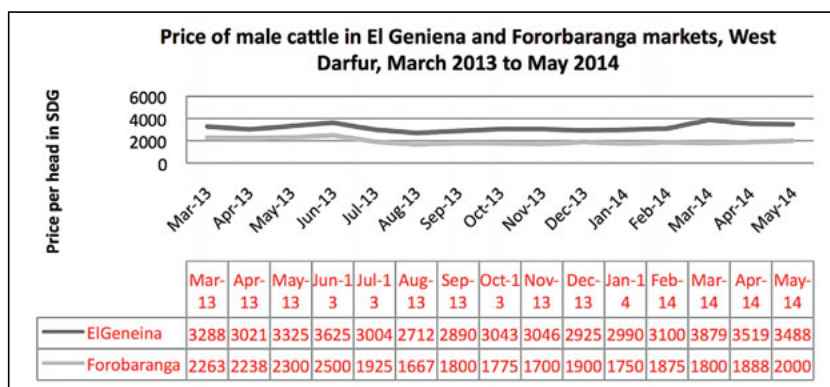


Figure 5: Price of male cattle in El Geneina and Forobaranga markets, West Darfur, March 2013 to May 2014

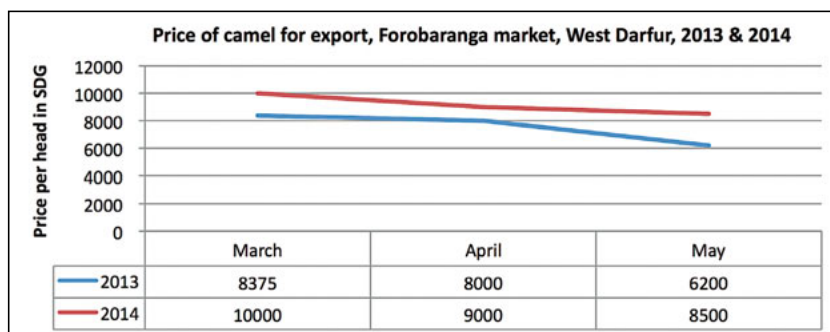


Figure 6: Price of camel for export, Forobaranga, West Darfur, 2013 and 2014

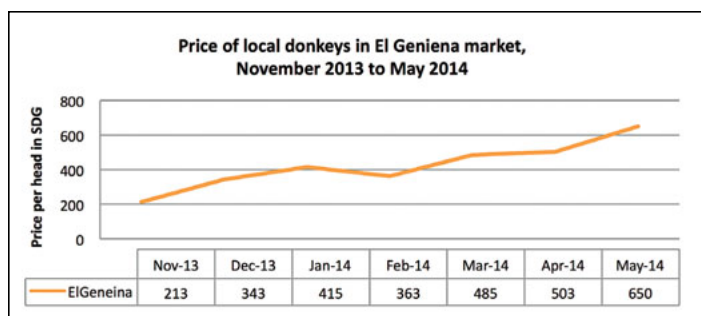


Figure 7: Price of local donkeys in El Geneina market, November 2013 to May 2014

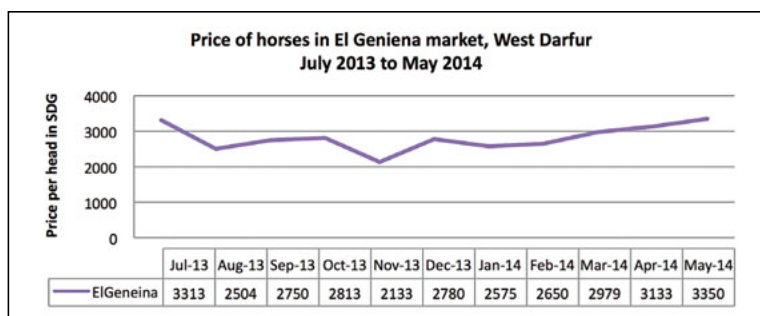


Figure 8: Price of horses in El Geneina market, West Darfur, July 2013 to May 2014

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Cash Crops

Groundnut prices reported an upward trend in almost all monitored markets this quarter. This was due to the continued influence of the bad 2014 harvest season, which triggered sharp increases in the price of both cooking oil and groundnut cake (used as animal fodder). For example, in El Geneina market groundnut prices rose by 120% between May 2013 and May 2014; by 164% in Kereinik; and by 88% in Misterei. The sharp price rise this quarter in Mornei, not traditionally a groundnut-producing area, may be due to increased demand for seed. A drum of groundnut cooking oil (weighing 36 pounds) increased by 25% in El Geneina market this quarter, and the price of groundnut cake also sharply increased. See Figures 9 and 10. The price of **dried okra** and **dried tomatoes** stayed very high because of the bad harvest season, as well as pest infestation in the case of dried tomatoes.

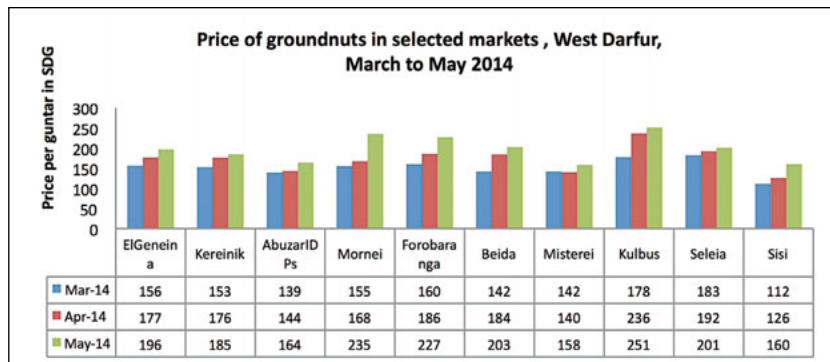


Figure 9: Price of groundnuts in selected markets, West Darfur, March to May 2014

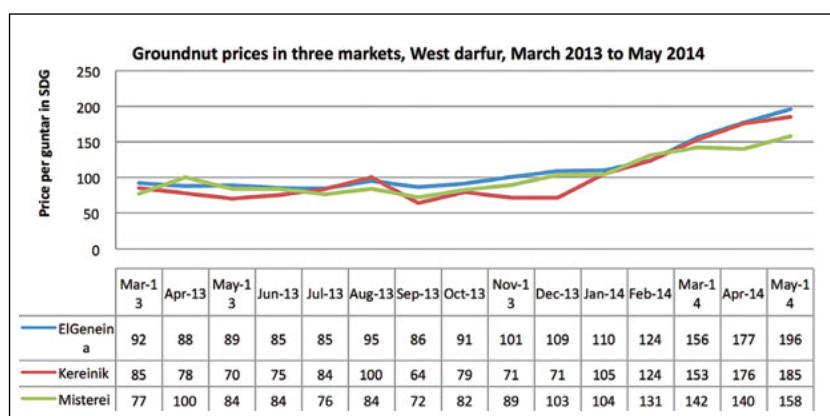


Figure 10: Groundnut prices in three markets, West Darfur, March 2013 to May 2014



Fruits and Vegetables

This quarter is the quarter of **mango** production in West Darfur and therefore the price of mangoes decreased in most markets. See Figure 11. The price of **fresh tomatoes**, however, increased during this quarter because it is the off-season. The price of fresh tomatoes increased in Mornei market by 72% during this quarter, by 173% in Forobaranga market, and by 143% in Kulbus market. See Figure 12. There was a slight rise in **onion** prices in most monitored markets, which is normal now onions are out of season.

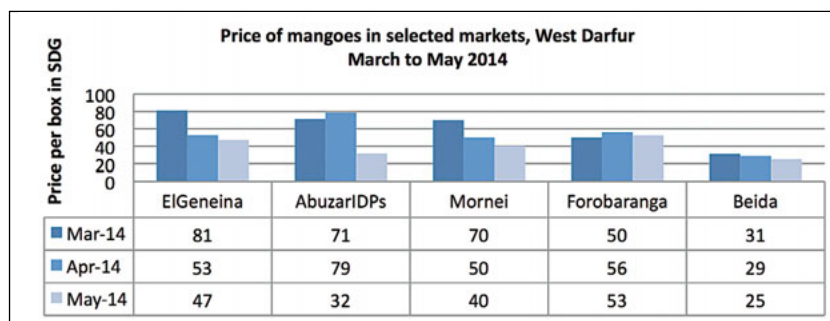


Figure 11: Price of mangoes in selected markets, West Darfur, March to May 2014

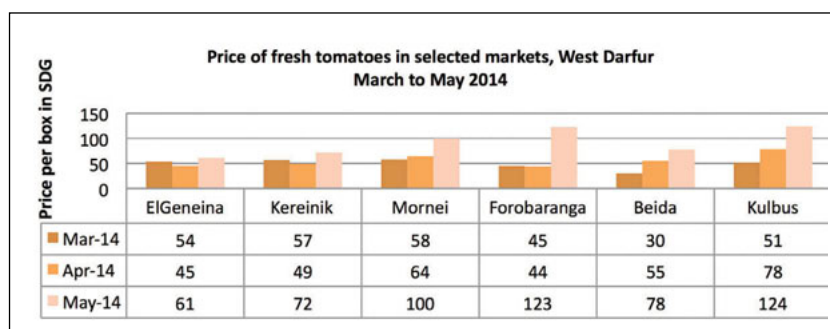


Figure 12: Price of fresh tomatoes in selected markets, West Darfur, March to May 2014

Transportation: Access and Costs

The paving of the section of road that connects Zalingei and El Geneina (part of the El Ingaz trade route that links Omdurman with El Geneina via Nyala, Kass, Zalingei and Mornei) was completed this quarter. As a result of this, the total amount paid per bus from Nyala to El Geneina reduced from SDG 2,000

to SDG 1,800, and the travel time halved, from 5 to 2.5 hours. However, the transportation cost per truck from Omdurman to El Geneina increased by 7% this quarter as the truck rental rate and informal fees increased. See Table 1, which shows how the cost of transportation from Omdurman to El Geneina has risen by 32% over a six-month period, from December 2013 to May 2014.

Table 1: Total transportation cost, SDG per truck (27t) from Omdurman to El Geneina, including fees and taxes

Cost items	Dec-13	Jan-14	Feb-14	Mar-14	Apr-14	May-14
Truck rent from El Geneina to Omdurman	45,000	43,000	46,000	55,000	60,000	60,000
Manifesto tax	2,100	2,700	2,500	2,100	2,100	2,100
Businesses profit tax	800	1,000	1,100	1,100	1,100	1,100
Value added tax	900	1,100	1,100	1,000	1,000	1,000
Sudanese meteorology and standards	300	40	500	200	200	200
State Ministry of Finance fees	1,500	5,300	5,500	3,000	2,500	3,000
Taxation paid to consumer	700	750	800	1,400	1,400	1,400
Locality fees	10	10	10	10	10	10
Departure fees	70	85	85	87	87	87
Checkpoints fees, Nyala to El Geneina	600	750	750	750	700	700
Informal checkpoint fees	2,500	2,700	2,900	3,000	3,000	3,000
Aldaein bursa fees	400	500	600	250	250	250
Nyala bursa fees	450	700	750	450	450	450
Zalingei bursa fees	350	400	500	300	300	300
Convoy fees paid for security	750	950	950	950	950	950
Total costs	56,430	59,985	64,045	69,597	74,047	74,547

Source: Trade Chamber, West Darfur

Daily Labouring

As this quarter is during the dry season, there were no agricultural labouring activities. Traditional daily labouring activities, such as brick-making, construction and domestic

service for town inhabitants, were the main sources of income, and the daily wage rate remained stable.



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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