



Headlines

- Cereal prices were stable or fell across West Darfur in anticipation of a good harvest after a favourable rainy season
- Livestock prices stabilized or increased slightly, although the price of meat in Geneina reached the same level as in Khartoum
- The limited availability of cash crops such as sesame and kerkadeh in many markets in West Darfur is unusual and deserves further investigation
- The price of fresh fruit and vegetables such as onions and tomatoes increased, a normal seasonal trend
- The rainy season hampered trade movements on many of West Darfur's major trading routes. Transport costs generally increased
- Opportunistic gold prospecting in North Darfur has caused shortages of agricultural labour in parts of West Darfur; labour migration to Libya has resumed, particularly from some IDP camps

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]

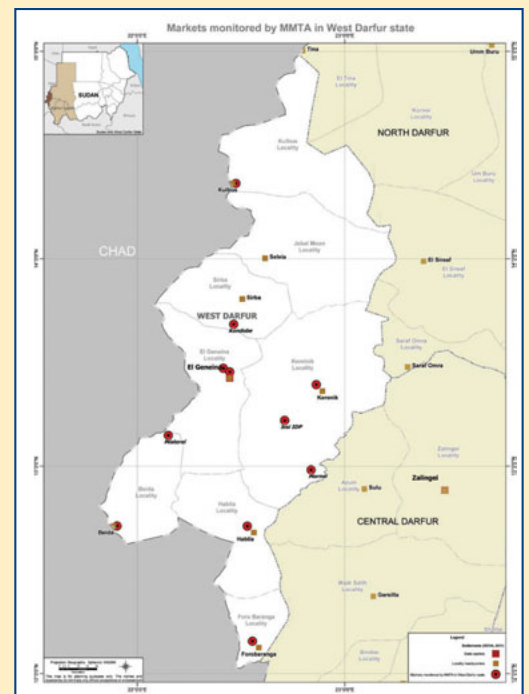
Community Development Association (CDA) [Foro Baranga and Kondobe]

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]

This project is funded by the European Union



Trade and Market Bulletin • West Darfur

Covering the Quarter June to August 2012 • Vol. 1, No. 2 • www.dra-sudan.org • mzakaria065@gmail.com

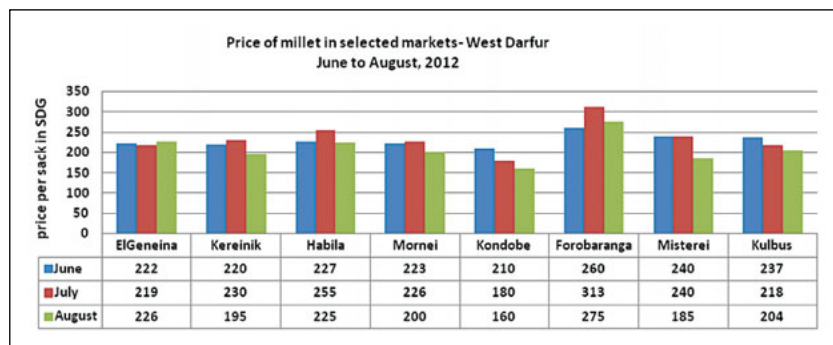


Figure 1 Millet prices in selected markets in West Darfur – June to August 2012

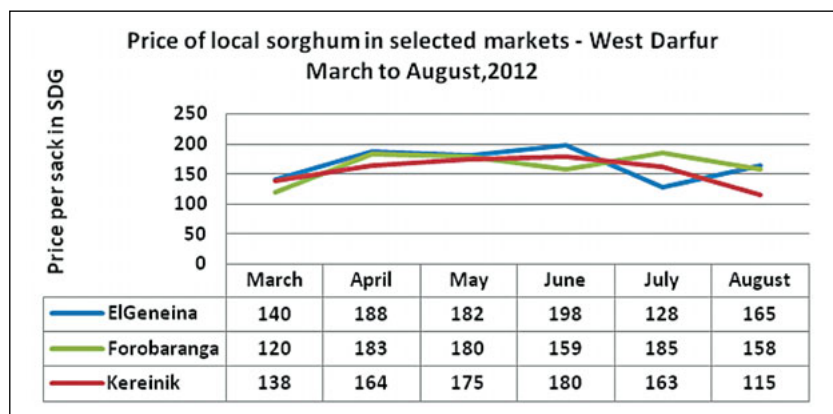


Figure 2 Sorghum prices in three markets in West Darfur – March to August 2012

Cereals

During this quarter there was an overall downwards trend in cereal prices across most monitored markets in West Darfur. Especially in August prices fell as it became apparent that the rainy season was good and therefore a good production season and harvest are anticipated. See Figure 1. The availability of cereals in store in El Geneina means that the price of millet in this major area of consumption has been more or less the same as the price of millet in areas of production such as Kereinik. Of all the monitored markets Foro Baranga market reported the highest price of millet, in July. Cereals from Foro Baranga supply South Darfur, and restrictions by the Chadian authorities on the movement of cereals across the border limited supply into the market during the quarter. Some locality authorities in West Darfur imposed controls on the movement of cereals out of their areas, for example Kereinik, Mornei and Kondobe. Food aid distribution by WFP was only for IDPs in June, but to both IDPs and to the resident population in July. This may also have contributed to price falls in August. Figure 2 shows there has been greater volatility in sorghum prices than in millet prices.

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Livestock

Overall, livestock prices registered a small increase during the quarter or were relatively stable, for example the price of male sheep and male cattle – see Figures 3 and 4. (The hike in cattle prices in Kereinik market in August 2012 is thought to be due to the movement of cattle away from the town to more distant pasture that month).

Habila market recorded the lowest livestock prices during the quarter, for sheep, goats and cattle.

The reasons appear to be a consequence of the distance from West Darfur's two main livestock markets – El Geneina and Foro Baranga – and the difficulty of livestock movements during the rainy season. Also, the livestock sold in Habila market are mostly for local consumption and are therefore of lower quality than livestock destined for export.

Although Foro Baranga is normally an important market for camel exports, no exports were reported in the months of July and August when rainfall is highest and livestock movements hindered. Indeed, most camel herders have moved north for grazing at this time.

Donkey prices are generally higher during the rainy season because they are used for farming practices – both local donkeys and Dongola donkeys. See Figure 5. Most horses sold in West Darfur are supplied from Chad. This source of supply dries up during the rainy season when livestock movements become difficult; horse prices therefore increased.

The price of meat in El Geneina has soared during the conflict years and is now SDG 40 per kg, similar to the price of meat in Khartoum. The reasons for such a high price in West Darfur, an important area for livestock production, deserve further investigation.

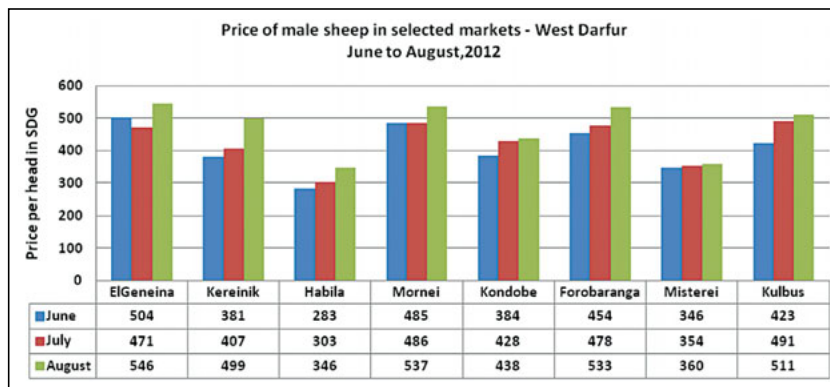


Figure 3 The price of male sheep in selected markets in West Darfur, June to August 2012

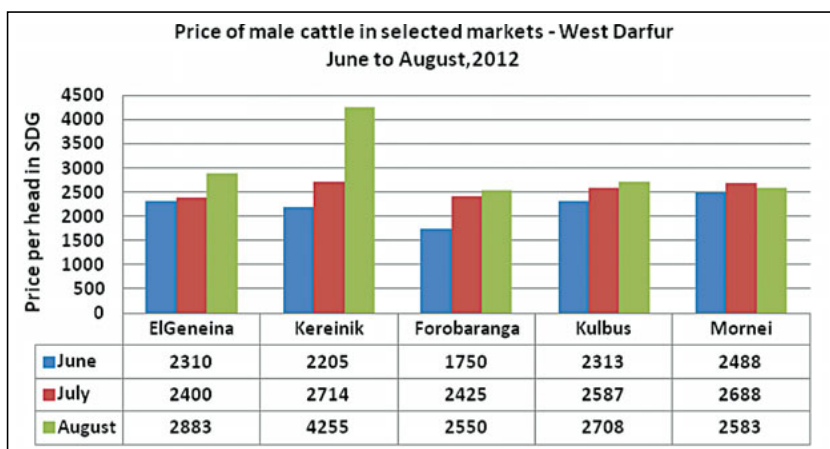


Figure 4 The price of male cattle in selected markets in West Darfur, June to August 2012

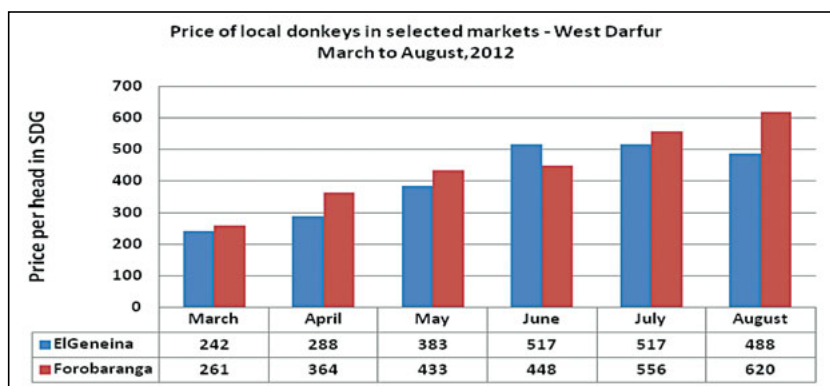


Figure 5 The price of local donkeys in El Geneina and Foro Baranga markets in West Darfur, March to August 2012

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Cash Crops

Groundnut prices remained high but relatively stable during this quarter, reflecting depressed production in the 2011/2012 season although a much better harvest is anticipated in 2012/13. See Figure 6. Misterei used to be an important area for groundnut production but has been badly affected by the conflict and displacement of farmers. Kereinik has now become a more important area of groundnut production.

The production of dried tomatoes and dried okra in West Darfur is mainly from Kereinik and Mornei (Azrnie Wadi). During the rainy season, however, most okra is sold fresh which is more profitable. This caused a fall in the price of dried okra in some markets. See Figure 7. The best quality dried okra is from Kulbus, most of which is sold in Chad and Saraf Omra rather than El Geneina.

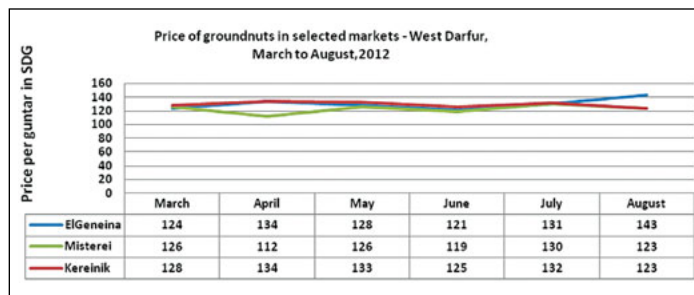


Figure 6 The price of groundnuts in three markets in West Darfur, March to August 2012

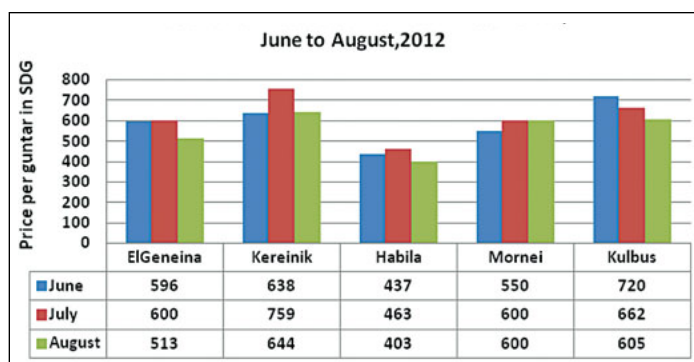


Figure 7 The price of dried okra in selected markets in West Darfur, June to August 2012

As reported in the last bulletin, unusually most monitored markets in West Darfur reported limited or no availability of sesame, karkadeh or watermelon seeds. This is surprising in West Darfur and deserves further investigation.



Transportation: Access and Costs

The rainy season hampered trade routes and flows in a number of ways. For example it took two to three days to travel by bus between Nyala and El Geneina; this journey usually takes

one and a half days (or one day before the conflict began). On another major trading route, between Zalingei and Mornei, and Mornei to Sisi, there has been some improvement due to paving of the road but movement on this route was still negatively affected by the rainy season. Kulbus locality normally trades directly with Saraf Omra in North Darfur, but during the rainy season these trade flows are seriously curtailed as roads become inaccessible when Wadi Kaja is flowing. Trade between El Geneina and Kulbus has been affected by lack of fuel. This has pushed the price of a jerry can (16 litres) of benzene up to SDG160 this quarter (June to August), compared with SDG 100 in the previous quarter of March to May. The number of checkpoints between El Geneina and Kulbus has dropped slightly this quarter, from 20 to 18, each charging SDG 5 per truck. Overall, the price of transportation on this route has continued to rise, from SDG 15 per sack in March, to SDG 20 per sack in May, and SDG 30 per sack between June and August.

Fruits and Vegetables

Onion prices rose during the quarter, a normal seasonal trend for this time of year. See Figure 8. Kondobe, an important area of production, reported the highest price in August. This is unusual as Kondobe produces onions that can normally be stored for some time so continue to be available when supplies from Saraf Omra have run out. The rise in price in August is reportedly because one merchant bought most of the supply in the market in order to store it.

The price of fresh tomatoes also rose during the quarter in most West Darfur markets, a normal seasonal trend. See Figure 9.

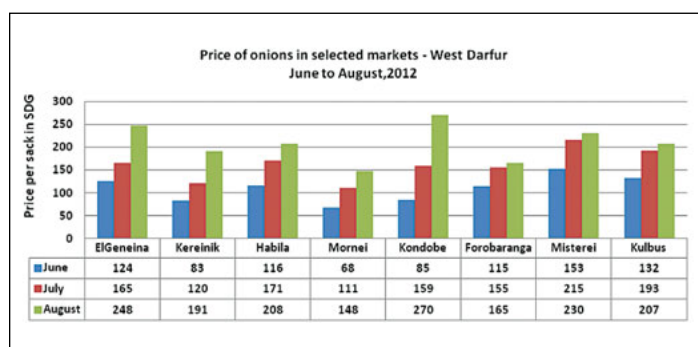


Figure 8 Onion prices in selected markets in West Darfur, June to August 2012

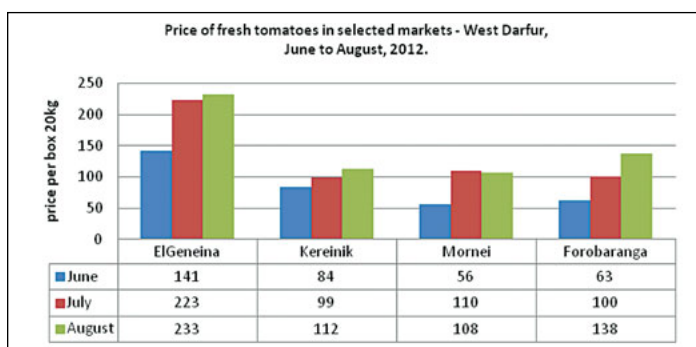


Figure 9 Price of fresh tomatoes in selected markets in West Darfur, June to August 2012

Income-generating Activities

Labour availability during the agricultural season has been affected in parts of West Darfur by opportunistic gold prospecting which has drawn some people to sites in North Darfur, and by the renewed labour migration to Libya in June and July. This has affected areas including Kereinik and Kulbus as well as some of the IDP camps such as Kirinding from whence labourers have

migrated to Libya. Agricultural labour shortages may have caused the costs of production to rise although this deserves further investigation. Opportunistic gold prospecting has also attracted people from Chad to pass through West Darfur to reach North Darfur and Kordofan.



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Advisory support: Feinstein International Center, Tufts University, funded by UKAid from the Department for International Development through the United Nations Environment Programme



United Nations Environment Programme

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

1. Ministry of Finance and Economy and Civil Service
2. Ministry of Agriculture and Irrigation
3. Ministry of Animal Resources and Fisheries



This project is funded by the European Union

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