



### Headlines:

- There was an upwards trend in cereal prices during the quarter (June to August 2013) in almost all the monitored markets in West Darfur as a result of the poor rainy season and anticipated poor harvest. Cereal prices rose in El Geneina market not only because of the poor rains but also because the cross border trade route to Chad was blocked by flowing wadis. Once again Forobarnga market registered the highest cereal price during the quarter, also due to the seasonal closing of the cross-border trade route to Chad.
- Livestock prices were stable or fell during the quarter, according to the seasonal movement of livestock from the far south of West Darfur to the northern part of the state. During this migration when there is a high presence of livestock around a particular market for a period of time, livestock prices fall eg in Geneina and Habila markets. Higher prices were registered in Kulbus, an area of greater security frequented by livestock traders from North Darfur.
- Sheep prices in both Forobarnga and Habila markets fell this quarter because of the impact of localized conflict in Wadi Salih in Central Darfur, causing herds to move from that area to the area around Forobarnga market, pushing prices down.
- Groundnut prices began to rise in most monitored markets of West Darfur during the quarter, a normal seasonal trend but exacerbated by the poor rainy season in 2013 and the prospect of trade routes opening up between Sudan and South Sudan.
- Onions price increased, following normal seasonal trends at this time of year. There was low availability of fresh tomatoes, also a normal seasonal trend.
- The main trade route from Nyala to El Geneina through Kas and Zalingei remained open during the quarter. There are still 80 checkpoints on the route, which is in very poor condition, but there were fewer delays as trucks are now being escorted in smaller convoys. Although the number of checkpoints between Kulbus and El Geneina fell compared with the last quarter, transport costs remained the same.
- The main activity for daily laboring was working in the agricultural sector - sowing, weeding and ploughing – rather than brick making and work in the construction sector.

### 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]

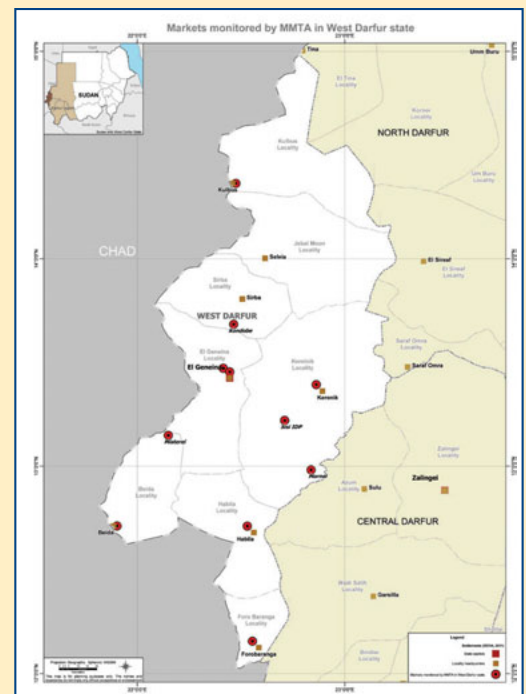
Community Development Association (CDA) [Foro Baranga and Kondobe]

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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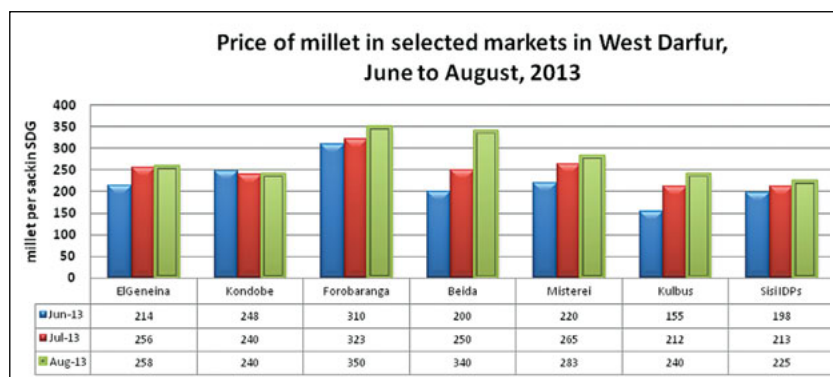


Figure 1: Price of millet in selected markets in West Darfur, June to August, 2013

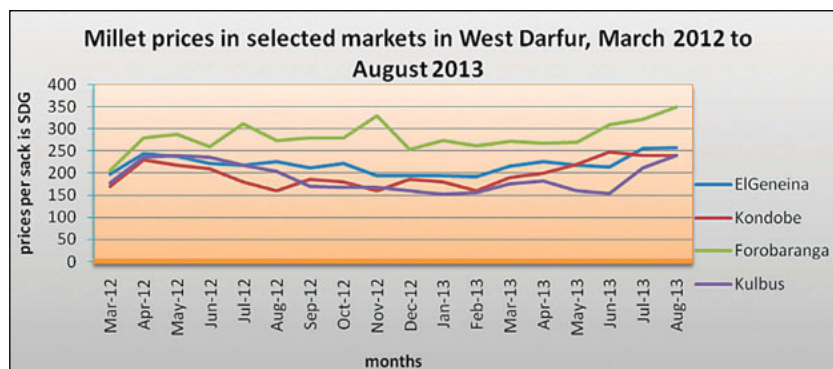


Figure 2: Longer-term trends in millet prices in selected markets in West Darfur, March 2012 to August 2013

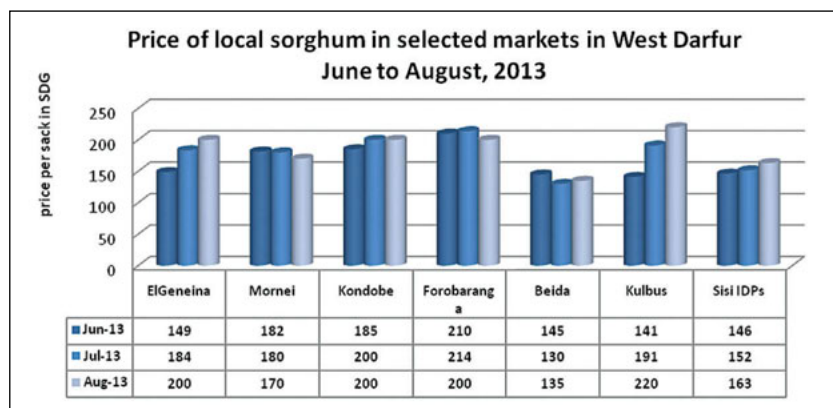


Figure 3: Price of local sorghum in selected markets in West Darfur, June to August 2013

## Cereals

During the quarter (June to August 2013) cereal prices were steadily increasing in almost all the monitored markets in West Darfur reflecting the negative impact of the delayed rainy season. See Figure 1 and also Figure 2 which shows longer-term trends. The poor rainy season in 2013 may have encouraged farmers to hold onto their cereal stocks until the prospects for the next harvest become clear. Thus, the flow of supply to almost all monitored markets declined at the same time as local demand rose. Another factor causing cereal prices to rise in El Geneina market was the closing of the cross border trade route to Chad because of flowing wadis, egWadi Issonga, in August 2013. Once again Forobaranga market registered the highest cereal price during the quarter, also due to the seasonal closing of the cross-border trade route to Chad as well as the seasonal closing of some important feeder routes that normally supply the market. Similarly, in Beida market the millet price in August 2013 increased by 70% compared with the price in June as Beida market depends very much on cereal supplied from Chad. Kulbus market registered the lowest millet prices during the quarter. There were no seasonal barriers hindering access to Kulbus and this is also an important area of cereal production. The quarterly average price of millet in Geneina market was SDG 243/ sack, in Forobaranga market it was SDG 328 and in Kulbus market it was SDG 202. The price differential between the average quarterly millet price in Forobaranga market and Kulbus market was 62%, a reflection of the seasonal market barriers to trade flows. The price differential between Kulbus and Geneina was 20%. The price of millet in Kondobe market was remarkably stable during the quarter, although this cannot necessarily be attributed to the local authorities setting a ceiling for millet prices in the market as traders have not adhered to this ceiling.

Local sorghum prices have shown similar trends to millet prices, rising in most markets although the price rises have not been as steep. See Figure 3.

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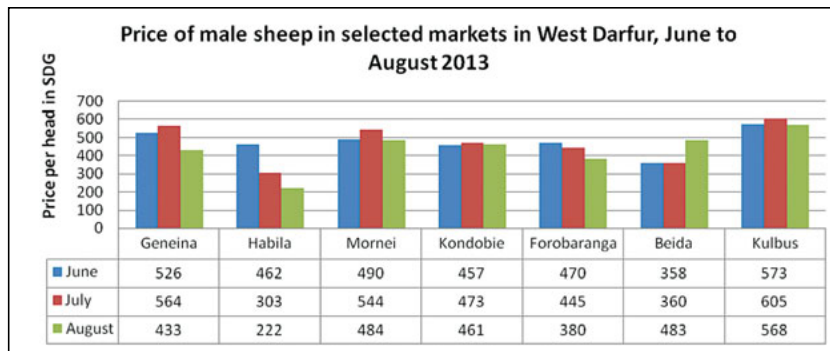


Figure 4: Price of male sheep in selected markets in West Darfur, June to August 2013

## Livestock

Livestock prices were stable or fell in all monitored markets in West Darfur during this quarter (June to August 2013). Many of the fluctuations can be explained by the seasonal movement of livestock from the far south of West Darfur to the furthest northern part of the state. When there is a high presence of livestock around a certain market, livestock prices fall, as in Geneina and Habila markets. See Figure 4. Habila market has registered the lowest price of sheep amongst all the monitored markets in West Darfur. See also Figure 5. This is due to the seasonal gathering of sheep herds around this market at this time of year causing prices to fall. Localized conflict in Wadi Salih in Central Darfur also caused herds to move from that area to the area around Forobaranga and Habila markets, pushing prices down. The highest sheep prices were registered in Kulbus where there is greater security and the market is frequented by livestock traders from North Darfur. Sheep prices rose sharply in Beida market in August 2013 because supplies from Chad stopped with the closing of cross-border trade routes by wadis and flooding. Kondobe market reported a stable price for sheep through the quarter. The local authorities have continued to attempt to regulate the price of meat at SDG 30 per kilo, although the market price prevails at SDG 40 per kilo.

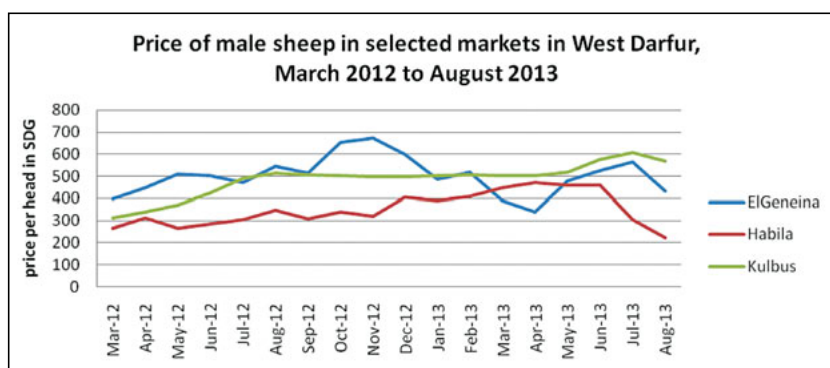


Figure 5: Longer-term trends in sheep prices in selected markets in West Darfur, March 2012 to August 2013

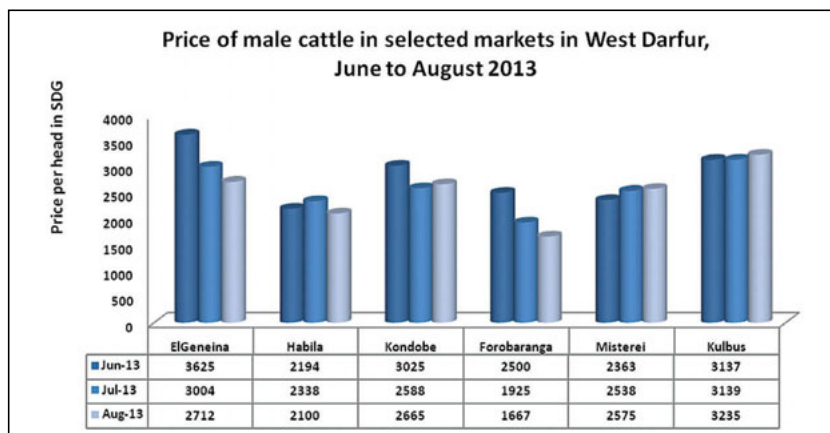


Figure 6: Price of male cattle in selected markets in West Darfur, June to August 2013

Cattle prices were stable or fell during the quarter. See Figure 6. The highest prices were registered in Kulbus and Geneina markets and the lowest price was reported in Forobaranga market. Figure 7 shows the downwards trend in cattle prices this quarter in Geneina and Forobaranga markets. The average price for the quarter in Kulbus market was SDG 3170 per head, and in Geneina market SDG 3114 per head, compared with the average price in Forobaranga market of SDG 2031 per head. This reveals a high

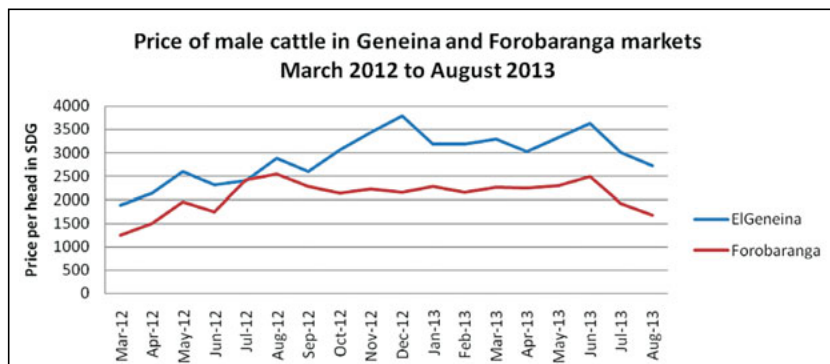


Figure 7: Longer-term trends in cattle prices in Geneina and Forobaranga markets, March 2012 to August 2013

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price differential of 56% between Forobaranga and Kulbus market, and 53% between Forobaranga and Geneina market. Possible reasons include the concentration of cattle around Forobaranga market as grazing areas further south in West Darfur become inaccessible because of heavy rains with high incidence of insects. The locality authorities have continued to provide subsidized meat in Forobaranga, at SDG 18 per kg

compared with the free market price of around SDG 24 per kg.

There was no availability of camels for export in the markets monitored in West Darfur because of the normal seasonal migration of herds towards the far north of Darfur. Generally, however, the price of camels for export fell due to the impact of political events in both Egypt and Libya.



## Cash Crops

During this quarter the price of most cash crops rose in almost all the monitored markets. Groundnut prices began to rise in most monitored markets during the quarter, a normal seasonal trend but exacerbated by the poor rainy season in 2013 and the prospect of trade routes opening up between Sudan and South Sudan. See Figure 8 and also Figure 9 for long-term price trends. Only a few markets reported availability of sesame during the quarter. Other cash crops such as dry okra and dry tomatoes were available in some markets with some increase in price. Watermelon seeds were not available in any market. Farmers may be discouraged from producing watermelons in areas such as Kulbus because of the early grazing of the fields by livestock. There was no gum arabic available in any market. Most gum arabic from West Darfur is probably being sold in Berak market in Chad.

## Fruits and Vegetables

Onion prices increased this quarter following normal seasonal trends at this time of year. See Figure 10. Forobaranga market reported the highest average price of onions during the quarter, SDG 391 per sack, as a result of the blocking of trade routes by heavy rainfall and flooding. Mornei market, a major area of production that supplies El Geneina market, reported the lowest average price of onions: SDG 252 per sack. There was a price differential of 55% between these two markets. There was low availability of fresh tomatoes, also a normal seasonal trend.

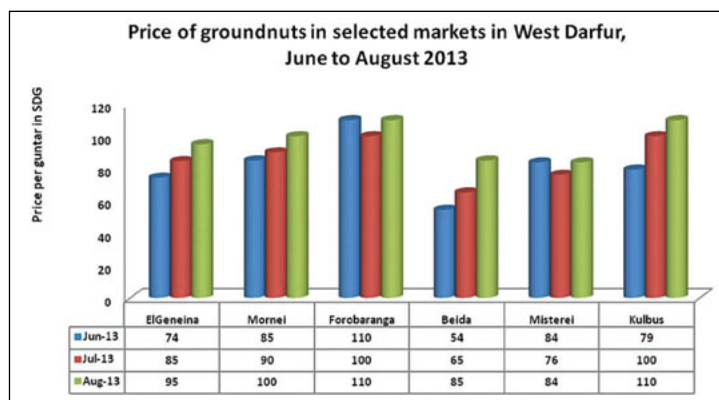


Figure 8: Price of groundnuts in selected markets in West Darfur, June to August 2013

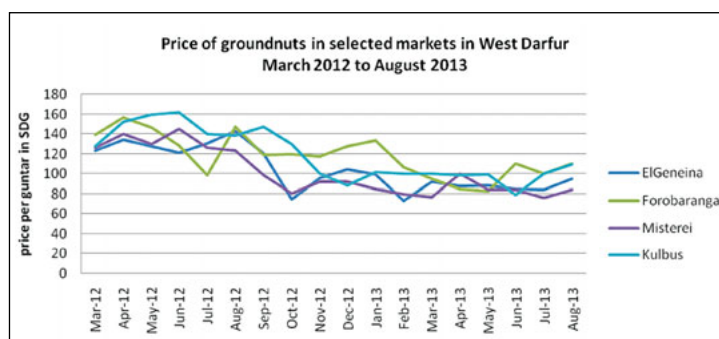


Figure 9: Long-term trend in groundnut prices in selected markets in West Darfur, March 2012 to August 2013

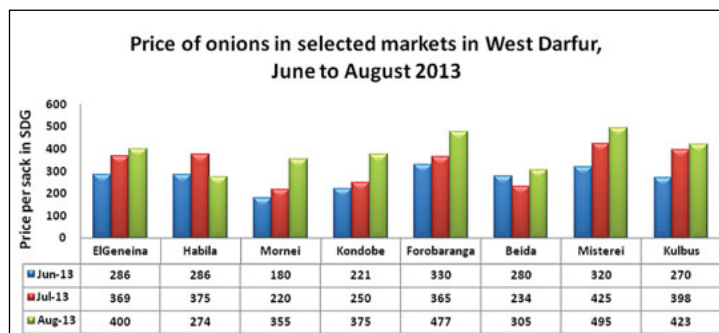


Figure 10: Onion prices in selected markets in West Darfur, June to August 2013

## Transportation: Access and Costs

The main trade route from Nyala to El Geneina through Kas and Zalingei remained open during the quarter. There are still 80 checkpoints on the route, which is in very poor condition, but there were fewer delays as trucks are now being escorted in smaller convoys. Although the number of checkpoints between Kulbus and El Geneina fell compared with the last quarter, transport costs remained the same. The checkpoints along this trade route fell from 11 to 9 this quarter, but the cost of transporting a sack of 90 kg from El Geneina to Kilbus remained the same as the last quarter: SDG 40 per sack. The usual trade route from Omdurman to El Geneina through Elnuhood, Eddain, Nyala and Zalingei changed during the quarter to Elnuhood to El Fashir, then to Nyala, Zalingei and El Geneina. This was due to insecurity in East Darfur State, and has contributed to an increase in transport costs and longer travelling time. See Figure 11.

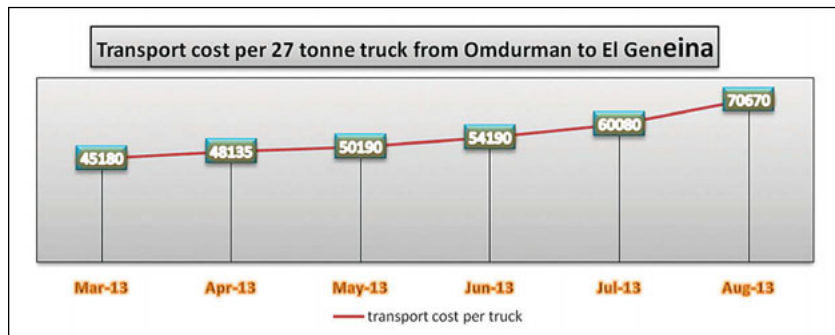


Figure 11: Transport cost per 27 tonne truck from Omdurman to El Geneina, March to August 2013

## Daily Labouring

Agricultural activities were the major source of daily labouring during the quarter in almost all monitored markets. The wage rate for weeding of 1 *mukhamas* was SDG 200 to 250 depending on the agreement between the farmer and the labourer. 1

*mukhamas* is around 1.2 feddans (5000 square metres) and usually takes 2 to 3 days to complete depending on the strength of the labourer.



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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



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