



Headlines



- **Cereal prices** continued to rise this quarter due to the continued negative effect of last year's poor harvest. Between June 2013 and June 2014 millet prices increased by 95% and sorghum prices increased by 103% in Zalingei market. In Um Dukhun market millet prices increased by 96% between August 2013 and August 2014, and sorghum prices increased by 143%. Limited supplies were exacerbated by heavy rainfall in Um Shalaya, which restricted market access. In some areas food-aid distribution stabilised prices.
- **Livestock prices** were relatively stable this quarter, which is the migration season for animals from south to north to avoid heavy rainfall and insects. The relative improvement in security contributed to stabilising prices. Camels were not available in most monitored markets as they moved north, nor were horses or improved donkeys available in markets like Um Shalaya, Garsilla and Treij. The price of local donkeys rose this quarter in all monitored markets because of their role in agricultural operations.

- The price of **cash crops** continued to rise in almost all monitored markets due to seasonality, aggravated by the blocking of some trade routes due to heavy rainfall, particularly trade routes out of Um Dukhun. Groundnut prices rose sharply this quarter, except in Um Dukhun where groundnut seeds were distributed by the NGO Triangle. Prices of both dried tomatoes and dried okra increased sharply because of seasonality: the price of dried okra increased by 790% in Zalingei between June 2013 and June 2014. However prices fell during August as other substitute vegetables became available.

- The price of **onions** gradually rose this quarter in most monitored markets due to seasonality and increasing transport costs. The price of fresh tomatoes increased in August in those markets that still had availability.

- Most **trade routes** were affected by heavy rainfall and flooding. Some were completely closed, for example the road to Um Dukhun, causing shortages of commodities such as cereals or onions. The trade route between Um Shalaya and Zalingei was affected by flood damage to Mornei Bridge in August.

- The main source of **daily labouring** was agricultural activities (sowing, weeding and ploughing). The daily wage rate was higher than the wage last quarter for non-farming activities such as brick-making and construction.

Participating CBOs and the markets they monitor

Sudanese Environment Conservation Society (SECS)
Zalingei

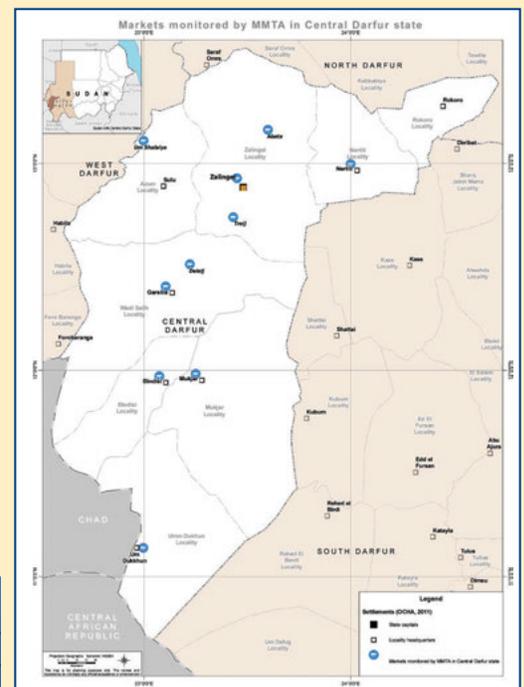
Darfur Development and Reconstruction Agency (DRA)
Umshalaya

Almanar
Nerteti

Daro Baida
Garsilla and Delaig

Albaraka Agriculture Organisation (AAO)
Bendisi, Umdukhn and Mukjar

Arebow Charity Organisation (ACO)
Abatta and Tereig



Cereals

Cereal prices mostly continued an upward trend this quarter across monitored markets in Central Darfur. This reflects the negative impact of localised conflict that flared up in the major cereal production area of the Wadi Salih zone earlier in the year, despite the new reconciliation agreement that was signed last quarter. Increasing prices were also due to the continued negative impact of the poor 2013 harvest season. For example, between February and August 2014 millet prices increased by 62% in Zalingei market and 125% in Um Dukhun. See Figure 1. Sorghum prices rose by 98% in Zalingei market and by 129% in Um Dukhun over the same time period. However, rainfall this quarter was more promising than rainfall in the same quarter last year, which is encouraging for the coming harvest season.

Localised conflict and heavy rains led to the blocking of some trade routes this quarter, which severely affected some markets, such as Um Dukhun. Between June and August cereal prices increased steadily in some markets and stabilised in others, but all markets recorded higher prices this quarter compared to last quarter (March-May 2014). Prices increased sharply in Um Dukhun, Mukjar and Nertiti markets between June and July because of high demand for cereals from animal owners who migrated to these areas in search of grazing for their animals during the rainy season.

As cereal prices have hit record highs in most markets this quarter, some organisations intervened in order to protect food security in the worst-affected areas. Interventions included distributing cereals and seeds to households, as well food aid

to assist with farming. Those organisations involved included Catholic Relief Services (CRS) in Mukjar, and the Near East Foundation (NEF) and Triangle Organization (TO) in Um Dukhun. These interventions resulted in the rate of increase in cereal prices slowing in these markets during this quarter compared with last quarter. Mukjar, for example, saw prices rise last quarter when CRS began buying up stocks, and then start to fall again as these stocks were sold at low prices. See Figure 2.

Millet and local sorghum prices increased in Bindisi and Nertiti markets in June and July due to high demand from animal herders, before falling again in August as livestock moved away from these areas. Even with this fall in August, prices remained higher than they were last quarter. In Zalingei market, however, prices rose because of trade route closures due to the rains, which affected normal transportation to the market, e.g. on the Saraf Omra route, which, incidentally, saw the ban on transporting cereals out of the area lifted in July.

The price of food-aid sorghum in Zalingei market fell steadily over this quarter following a steady decline in demand for food-aid sorghum, which is normal at this time of year: food-aid sorghum was being used as fodder for dairy and poultry farms around Zalingei, but during the rainy season green grass is available and sorghum for fodder is no longer needed. In spite of efforts by NEF and TO, the highest sorghum prices were recorded in Um Dukhun market. Um Dukhun suffered from a lack of supply due to the poor 2013 harvest like other markets, but also due to the closing of trade routes; demand has also increased because of the presence of people from neighbouring

Cereals continued on next page

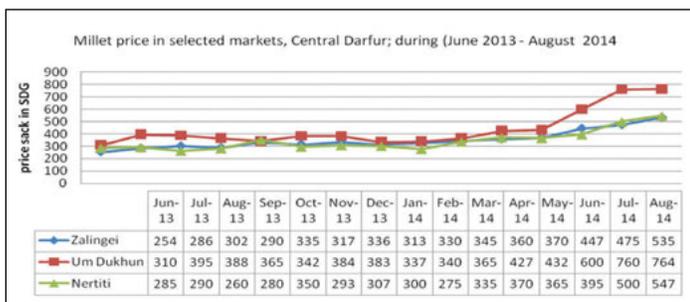


Figure 1: Millet price trends in selected markets, Central Darfur, June 2013 to August 2014

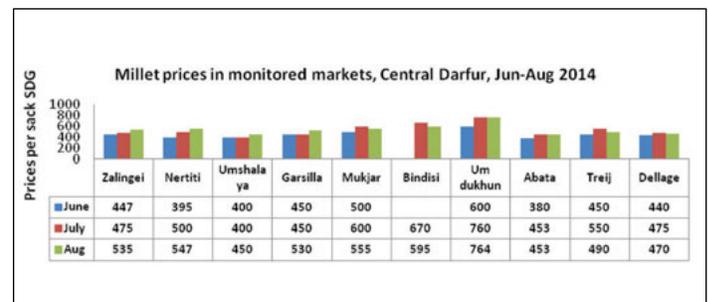


Figure 2: Millet prices in monitored markets, Central Darfur, June to August 2014

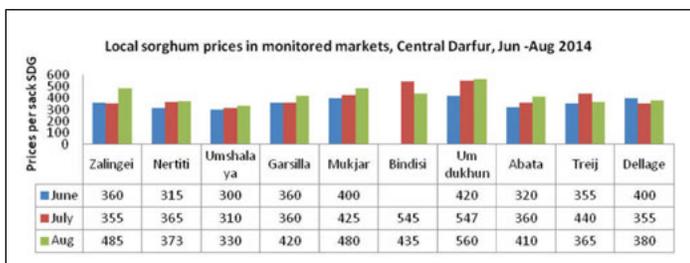


Figure 3: Locally-produced sorghum prices in monitored markets, Central Darfur, June to August 2014

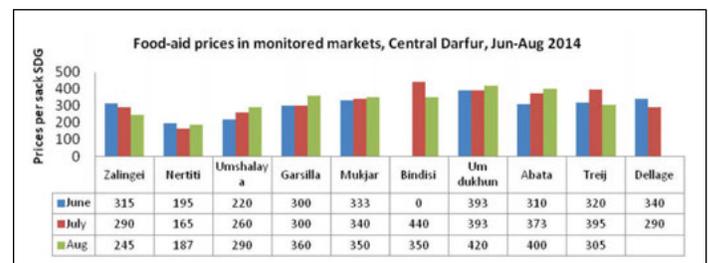


Figure 4: Food-aid sorghum prices in monitored markets, Central Darfur, June to August 2014

Cereals (continued)

Central African Republic and Chad. Sudanese traders transport cereals to sell at the refugee camps in Chad, which lie close to the border; additionally people living in Sudan will often buy cereals to send across the border to their relatives living in the refugee camps. See Figure 3.

The price trend in food-aid sorghum differed from market to market this quarter according to whether or not food-aid had been distributed: if it was distributed prices fell, and if not prices rose. For example, distribution of food-aid by WFP took place

in Zalingei and Nertiti markets and subsequently the prices of food-aid sorghum were lower in August than they were in June. On the other hand prices rose between June and August in Um Shalaya and Abata where food aid was not distributed. Sorghum food-aid prices fell in Bindisi market in August after food-aid was distributed by the Darfur Regional Authority (DRA) during the last week of July. No data was gathered in Bindisi for June because of insecurity, and there was no availability of food-aid sorghum in Dellage in August. See Figure 4.

Fruits and Vegetables

Onion prices increased sharply in almost all monitored markets as the harvest season tailed off and the rains began, which is normal at this time of year. Zalingei and Um Shalaya are the main production areas of onions and they supply all other parts of the state. The highest onion prices were recorded in Wadi Salih Zone (Um Dukhun, Mukjar and Bindisi) where heavy rainfall blocked trade routes and restricted access both in and out of the markets. However prices in Garsilla were relatively

stable because onions had been stored here in preparation for the rainy season and therefore stocks did not run as low as they did in other markets. See Figure 5.

Fresh tomatoes and mangoes were not available in many markets, and those markets that had availability reported dramatic price increases due to it being the off-season. See Figure 6. Orange prices were relatively stable but oranges were not available in markets like Dellage and Treij because *wadi* flows blocked the trade route.

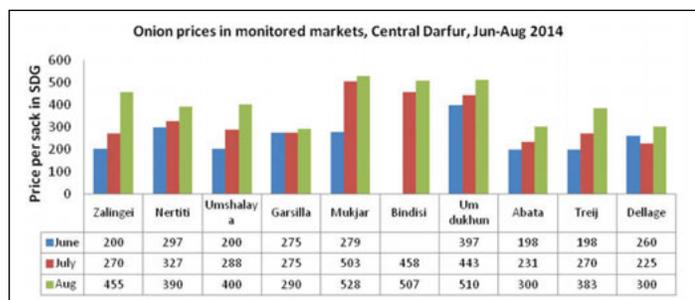


Figure 5: Onion prices in monitored markets, Central Darfur, June to August 2014

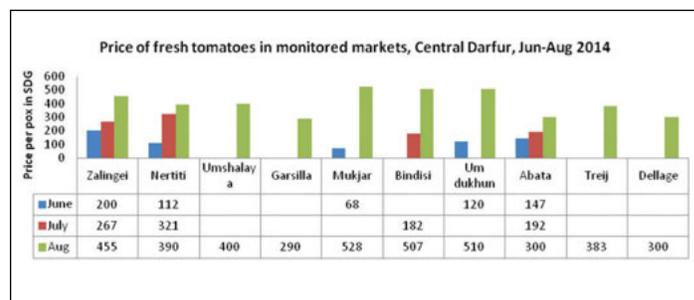


Figure 6: Price of fresh tomatoes in monitored markets, Central Darfur, June to August 2014

Daily Labouring

Agricultural activities were the main source of daily labouring this quarter, as it was the rainy season and therefore the main

agricultural production season. The rainy season is less suitable for brick-making and construction. See Table 1 below.

Table 1: Daily wage rates

| Activity | Wage rate SDG/day | Gender |
|------------------------------|-------------------|--------------------|
| Farm work | 40 - 50 | Mainly Women |
| Building work | 25 - 30 | Women/men/children |
| Brick-making | 25 - 30 | Women/men/children |
| Restaurant and tea services | 15 - 20 | Women/children |
| Domestic services - Zalingei | 15 | Women |

Cash Crops

Generally cash crop prices showed an upward trend this quarter, due to it being the off-season and to the blocking of some trade routes because of heavy rains. Groundnut prices increased steadily for these reasons and were unavailable in some markets, such as Zalingei. Um Dukhun, on the other hand, saw groundnut prices fall a little because of the restricted access of buyers to the market due to *wadi* floods, as well as the distribution of groundnut seeds by TO. See Figure 7.

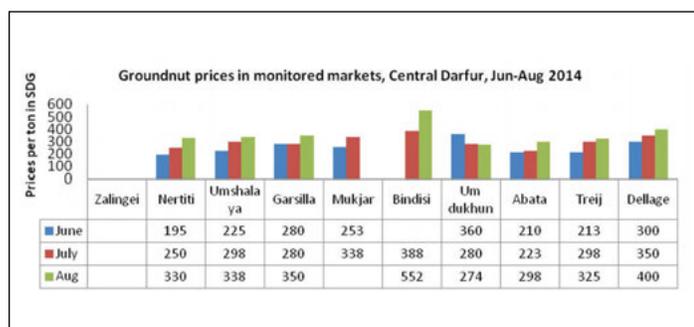


Figure 7: Groundnut prices in monitored markets, Central Darfur, June to August 2014

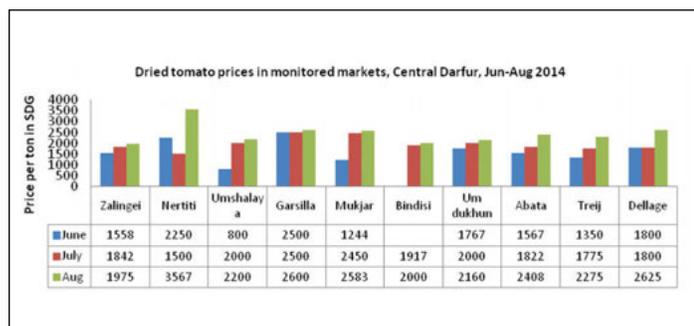


Figure 9: Price of dried tomatoes in monitored markets, Central Darfur, June to August 2014

The price of dried okra and dried tomatoes remained high compared to June-August 2013 owing to the impact of the bad harvest season last year. For example, in Nertiti market the price of dried tomatoes increased by 476% between June 2013 and June 2014, as it is a major production area not just for Central Darfur but across the whole of Darfur. The price of dried okra increased sharply in July and then started to fall in August in most monitored markets, as substitutes such as *molokhya* became available following the rainfall in August. See Figures 8, 9 and 10.

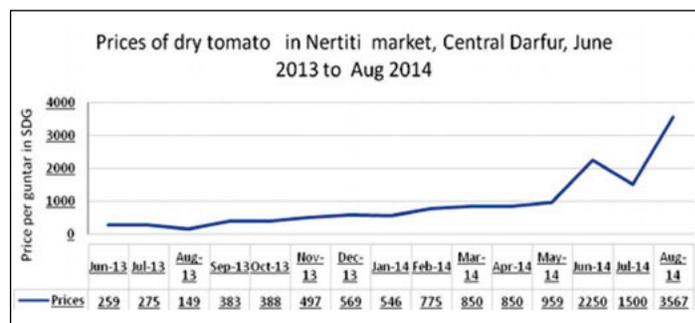


Figure 8: Price of dried tomatoes in Nertiti market, Central Darfur, June 2013 to August 2014

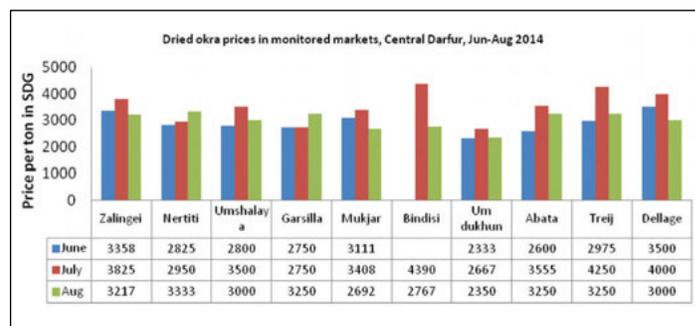


Figure 10: Dried okra prices in monitored markets, Central Darfur, June to August 2014

Trade Routes: Access and Cost

Most trading roads in Central Darfur were badly affected by heavy rainfall and the flow of wadis this quarter, which caused the closure of some markets, e.g. Um Dukhun, and disrupted some trade routes that link the main markets with each other. For example, Mornei bridge was damaged by floods and led to the blocking of the trade route with El Geneina for a week in August. When this happened, trucks could not be used for transportation and other modes were adopted instead. For instance animal carts were used as well as some more traditional ways, like make-shift rafts (*taror*) that transport people and goods across the *wadis*.

The significant trade route connecting the Wadi Salih area with the Azoom area was badly affected by the rains, particularly the

section between Garsilla and Um Dukhun which was completely blocked for some time. This caused prices of local commodities and materials in Um Dukhun to increase. Similarly, the trade route that links Um Dukhun-Mukjar-Bindisi was also blocked which led to the complete isolation of Um Dukhun market. Therefore transportation costs went up which in turn increased cereal prices, e.g. millet prices in August in Um Dukhun market.

The paved Zalingei-Nertiti-Nyala trade route that links West, Central and South Darfur remained open and was still used by trucks this quarter, despite heavy rainfall and check points. Most commodities travel along this route in to and out of Central Darfur, West Darfur and Saraf Omra in North Darfur.

Livestock

Generally livestock prices were relatively stable in almost all monitored markets during this quarter compared to last quarter. Usually during this period (June to August) most people are engaged in agricultural activities (preparing farm land, planting/sowing and weeding) and so the scale of local livestock trading declines. Livestock migrate from one area to another in search of good pasture, and as a result animal prices vary from one market to another: if livestock move away prices rise, and when livestock return prices fall. However, such rises and falls in price are short-lived as the animals move from one place to the next relatively quickly, leading to frequent shifts in price trends.

Um Shalaya market saw cattle prices fall this quarter, possibly because of the market's proximity to Saraf Omra which has seen some insecurity, but also potentially because it attracts looted animals to the market, due to its position close to Central, West and North Darfur. On the other hand Garsilla, Bindisi and Abata

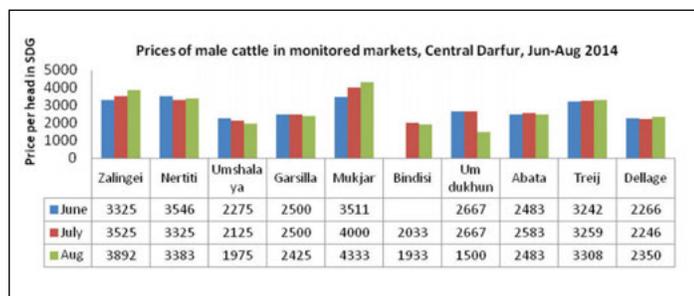


Figure 11: Prices of male cattle in monitored markets, Central Darfur, June to August 2014

markets saw prices stabilise. Cattle prices in Zalingei market showed an upward trend, in contrast to the downward trend of last quarter, owing to the departure of livestock for more distant pastures and the high demand for meat in Zalingei market due to the population concentration in Zalingei., See Figure 11.

The price of local donkeys increased this quarter compared to last quarter, reflecting the high demand for their use in agricultural activities. The highest prices were reported in Nertiti and Um Dukhun market. See Figure 12.

Meanwhile the price of both sheep and goats appeared stable in almost all monitored markets because of improvements in the security situation which led to a more equal distribution of livestock throughout the state. There was no availability of camels and horses in most markets this quarter, because the buying and selling process usually takes place outside the market at this time of year, as animals move north during the rainy season.

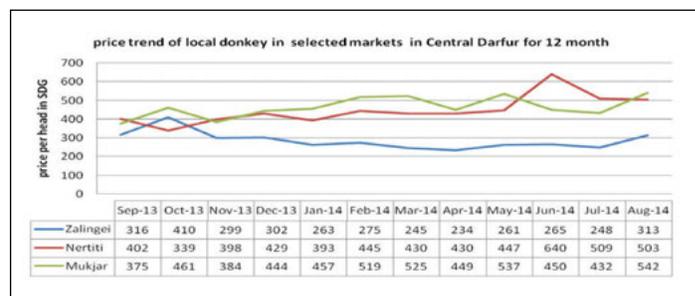


Figure 12: Price of local donkeys in selected markets, Central Darfur, June to August 2014

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/NGOs plus DRA are monitoring 10 markets across Central Darfur 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.



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

1. Ministry of Agriculture, Animal Resources and Irrigation
2. Ministry of Finance, Economy and Labour