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TAKING ROOT: The Cash Crop Trade in Darfur





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Executive Summary

Purpose and scope

The purpose of the study is to understand the impact of a decade of conflict in Darfur on the trade in some of Darfur's major cash crops. How has the cash crop trade adapted, and to what extent, if at all, has it recovered? What are the major constraints faced? The ultimate objective is to identify how the cash crop trade can be supported to better sustain livelihoods in Darfur, and to support the eventual recovery of Darfur's economy. The study covers groundnuts, Darfur's most important cash crop, as well as sesame, gum arabic, *tombac* (chewing tobacco), and oranges. The main focus is trade and agro-processing, although the study also explores trends in production during the last decade.

A historical overview and policy context

In the 1960s, cotton, gum arabic, and groundnuts were Sudan's major exports. By the 2000s, sesame had become Sudan's most valuable export crop, and groundnut exports were of minimal significance, although national groundnut production is still two to three times higher than national sesame production. Government policy has been a major determinant of the fluctuating fortunes of Sudan's cash crops. Darfur makes a substantial contribution to national cash crop production, producing around one-third of the national groundnut harvest and at least 30% of the gum arabic trade in Sudan. Its share of national sesame production is much lower, probably less than 10%, most of which is used for local consumption within Darfur. The Jebel Marra area is one of Sudan's major production areas for oranges. In North Darfur there is an important *tombac* economy on which many livelihoods depend; North Darfur State is the major production area for *tombac* in Sudan.

During Sudan's oil-rich years, relatively little attention was paid to the agricultural sector, although that has changed with the secession of South Sudan and falling oil revenues. While some aspects of agricultural policy have been revitalized, the long-running tension between investing in the irrigated and semi-mechanised

farming sectors versus the traditional rainfed sector persists. The former two sectors continue to receive greatest attention as primacy is given to macro-economic stabilization objectives over poverty reduction or employment generation.

Groundnuts

Each of Darfur's five states produces groundnuts, especially South and East Darfur. With the outbreak of conflict in 2003, groundnut production fell by 40 to 50% as large numbers of farmers became displaced. Those farmers still *in situ* have mostly reduced the area under cultivation because of insecurity and because of the high costs of production, a particular constraint since the breakdown of the traditional *sheil* system of credit that was crucial to groundnut production pre-conflict. Groundnut production recovered marginally in 2008 and surged in 2012 as farmers responded to the high price of groundnuts and groundnut oil in 2011/12. 2012 was also a very good rainy season. The market was unable to absorb this increase in production and, unusually, groundnut prices fell in the months after the harvest. Many farmers probably made a loss on their groundnut production in 2012/13 as labour shortages had forced up the costs of production; agricultural labourers from South Sudan were no longer present, and many young men had left farming to prospect for gold in North Darfur. Less vulnerable to pests, and to losses from grazing livestock because the nuts are underground, groundnuts appear to be a relatively conflict-resistant crop and can withstand breaks in the rainy season better than cereals. Nevertheless, groundnut productivity shows a downwards trend over at least the last decade, a consequence of the lack of committed research and extension.

The volume of groundnuts in the market in Darfur has similarly slumped during a decade of conflict. Many large-scale traders left the business, either due to bankruptcy early in the conflict or because they moved to more stable parts of Sudan; this latter trend accelerated with the deterioration in security in Nyala in recent months. Meanwhile, the number of small-scale

traders in Darfur's main towns has risen, although for many this is a form of petty trade. Rising taxation within Darfur is a major constraint to the groundnut trade. Taxation levels are substantially higher than other states in Sudan, and revenues are not being reinvested back into the sector. Transport costs have also risen two to four times. Traders therefore need more capital, yet informal credit mechanisms no longer function as trust has broken down during the conflict years. Lack of liquidity is one reason the market was unable to absorb the increase in production in 2012/13. The quality of groundnuts being traded during the conflict years appears to have deteriorated, and there is little investment in quality control. There is very low awareness of the risks of aflatoxin; poor harvesting and storage practices contribute to high aflatoxin levels.

The number of large-scale groundnut oil processing plants in Darfur has fallen substantially. Those still working are usually operating at 50% capacity, not only because of falling production but also because of the unreliable power supply and high levels of taxation. Meanwhile, the number of small-scale mills has increased, partly to meet the growing demand in urban areas and also because of a lack of other business opportunities. The groundnut agro-processing sector has thus shifted from trading outside Darfur to meeting local consumption needs in urban areas.

A new and buoyant market has developed in the last decade in Darfur's main towns for groundnut cake and groundnut leaves for livestock fodder, fuelled by the burgeoning dairy industry. The market value of groundnut shells, now used for poultry feed, in brick-making, and

chain for sesame in Darfur, but there appears to have been little sesame in the market in recent years. The rising international price for sesame has contributed to this being an important export at national level. However, Darfur's markets for sesame are poorly integrated with markets in Central Sudan.

Gum arabic

Sudan used to be the world's leading producer of gum arabic, accounting for 80% of supplies on the world market in the early 1990s. This share had fallen to around 45% by 2012. The long-term decline in gum arabic production in Sudan is strongly related to an unfavourable policy environment; for many years, producers received very low prices. Many acacia trees were cut down as farmers switched to growing cereals and cash crops instead. In 2009, the gum arabic trade was liberalized in Sudan and the Gum Arabic Board established, widely regarded as one of Sudan's more effective commodity boards. Since then, the farm gate price and production have risen. But in Darfur production is badly affected by the conflict. *Acacia seyal* trees are often in remote areas, which have become highly insecure. Production from *Acacia senegal* has been negatively affected by displacement. Since liberalization of the gum arabic market there has, however, been a rise in the number of gum arabic traders in Nyala, although their business is constrained by a lack of credit and by high taxation. There has long been a flourishing informal cross-border trade in gum arabic from Darfur to Chad. This has continued during the conflict years, especially from West Darfur, driven by a clear price incentive: in 2012/13 the price of gum arabic in Chad was 25% higher

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