

# MARKET ASSESSMENT IN SOUTH SUDAN: NORTHERN BAHR AL GHAZAL, WESTERN BAHR AL GHAZAL AND WARRAP STATES FINAL REPORT

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December 2013



## **1. Objectives**

2. Methodology

3. Definitions

4. Products

5. Cross-cutting issues

6. Findings per market (12 markets)

7. Recommendations

## 1. OBJECTIVES

The purpose of this assignment is to conduct a market assessment of key markets in Northern Bar al Ghazal, Western Bar al Ghazal and Warrap states

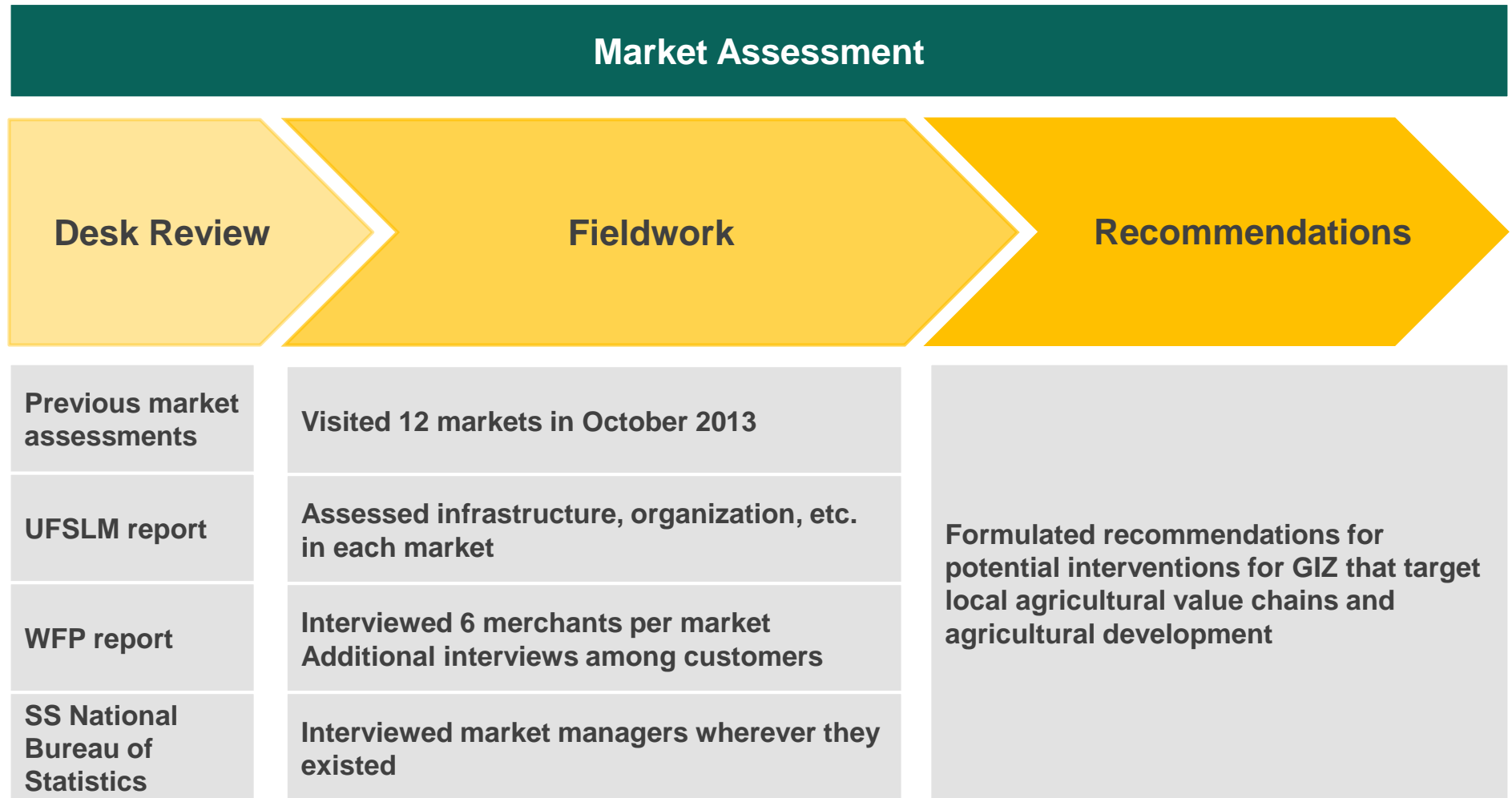
More specifically, the research aims to:

1. Map out the target markets in terms of infrastructure, organization and actors
2. Assess what products are traded and marketed
3. Identify areas of inclusion for women and youth
4. Formulate potential interventions for GIZ in the markets with programming that targets local agricultural value chains and agricultural development

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## 2. METHODOLOGY

The methodology included a desk review and fieldwork in the markets in order to provide GIZ with tailored recommendations for potential interventions



## 2. METHODOLOGY > SCOPE OF WORK

The project covered 12 main markets in 3 states. 72 Key Informant Interviews (KIIs) have been conducted with merchants, 10 with market managers and 24 with customers

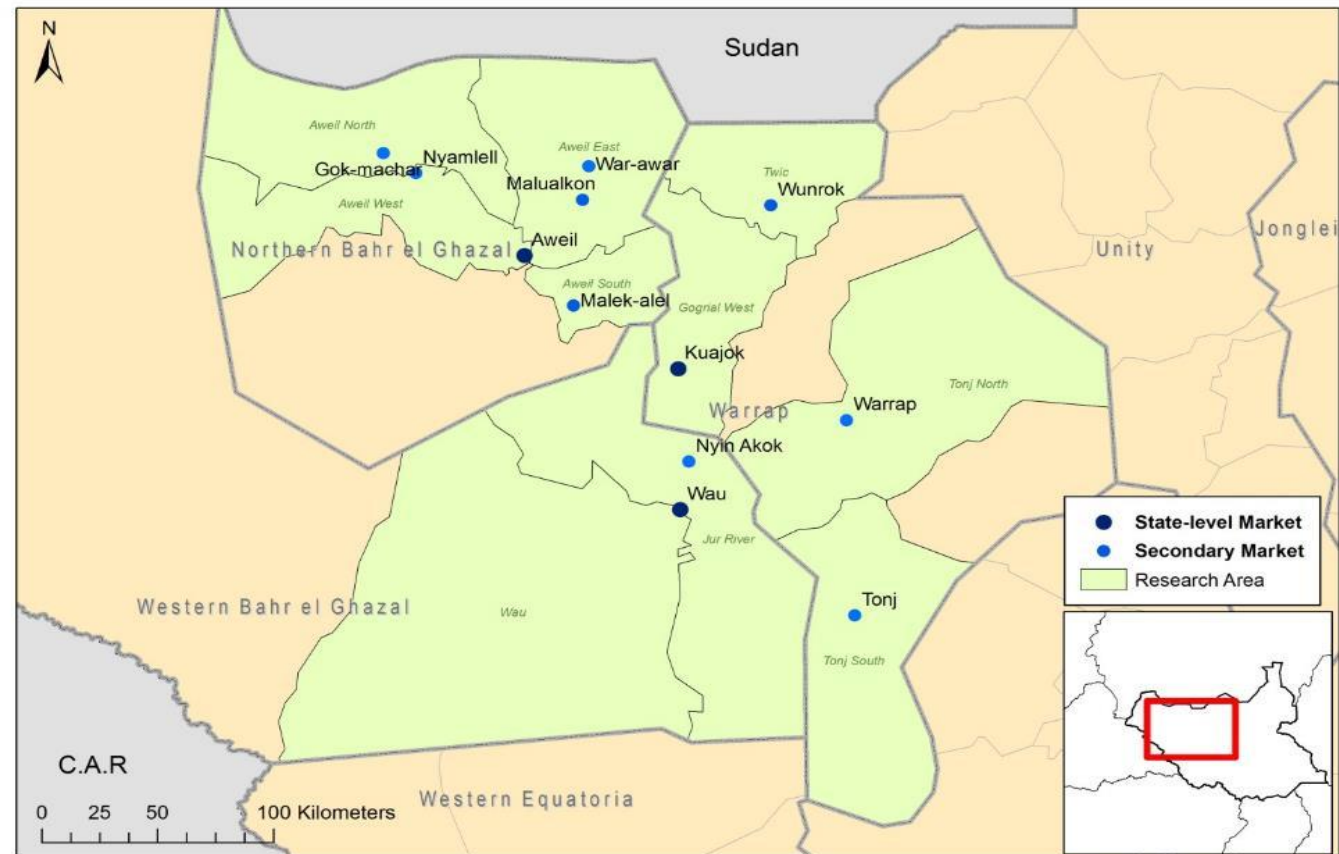
**3 states**

**11 counties**

**1 main market per county**

**10 interviews per market**

**Around 70 questions per interview**



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### 3. DEFINITIONS > EXAMPLE OF STALLS

Stalls can be grouped into 3 categories

#### Level 1 stalls



- Permanent stalls, constructed with a mix of concrete, iron sheeting and wood
- Largest stalls found on the markets (averaging around 8 m<sup>2</sup> and more)
- Can be locked and often contain an overnight storage facility
- Protect goods / merchants against the elements
- Highest monthly rents (from SSP 200 to 500)

#### Level 2 stalls



- Semi-structured. Built from wood and covered with dried grass or plastic sheeting
- Average size of 6 m<sup>2</sup>
- Do not protect goods / merchants from rain or wind but give some protection from the sun
- Often shared between merchants
- No storage facilities

#### Level 3 stalls



- Mobile stalls do not have any permanent structure
- Stalls merely consist of a plastic sheet spread on the ground
- Goods / merchants have no protection from the elements
- Merchants do not pay rent
- Mainly used by youth and women



Definitions of local terms used for products can be found below

#### Lulu oil



*Lulu* oil is an oil made of shea nut and used for cooking. Lulu, palm and sesame oils are the most common types of oils found on markets

#### Green leaves



*Green leaves* is the term used to describe several varieties of leaves

#### Dried fish



Dried fish can be rolled and spiced, smashed, or cut and filled with okra

#### Groundnut paste



Ground groundnut (peanut) is put into small plastic bags to be eaten as is, or cooked in dishes

#### Koms



Most vegetables are sold in a *kom*, a pile of 4 to 8 items

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## 4. PRODUCTS > AVAILABILITY ON THE MARKETS (1)

Variety and availability of products depend on how the market is supplied and on the seasonality of local produce

Food Items	Produce												
		Wau	Nyin Akok	Warrap	Tonj	Kuajok	Maluaklon	Wunrock	Malek Alel	Aweil	Nyamlell	Gok Machar	Warawar
	Meat												
	Fresh Fish												
	Poultry		few	few	few	few	few	few	few				few
	Eggs												few
	Fresh Milk										few		few
	Cheese												
	Okra												
	Green Leaves												
	Sorghum												
	Onions						few		few			few	few
	Tomatoes						few		few		imported		imported
	Eggplants												
	Pumpkin												
	Groundnuts												
	Maize												
	Garlic												
	Potatoes												
	Sweet Potatoes												
	Pepper						local		local				
	Carrots					few		few		few			
	Cucumber					few							
	Banana					few							
	Pineapple					few		few					
	Apple					few							
	Oranges										few		few
	Limes												
	Mango												
	Papaya												
	Cassava												
	Guava										few		

	Available during both seasons	Mainly produced locally
	Available only during dry season	Mainly imported
	Available only during rainy season	Both produced locally and imported
	Not available	

**Few:** indicates that the product is available but in small quantities

**Imported:** indicates that the product is mainly imported into a particular market

**Local:** indicates that the product is mainly locally produced in that particular market

## 4. PRODUCTS > AVAILABILITY ON THE MARKETS (2)

Variety and availability of products depend on how the market is supplied and on the seasonality of local produce

			Wau	Nyin Akok	Warrap	Tonj	Kuajok	Malualkon	Wunrock	Malek Alel	Aweil	Nyamlell	Gok Machar	Warawar
Food Items	Transformed	Groundnut Paste												
		Dried Fish												
		Sorghum Flour												
		Wheat Flour												
		Maize Flour												
		Powdered Milk												
		Sugar												
		Salt												
		Spices						few		few				
		Rice										few	few	
		Beans												
		Pasta										few		
		Grains												
		Palm Oil												
		Sesame Oil										few	few	
		Shea Oil (Lulu)												
		Simsim Oil												
		Olive Oil												
Non-Food Items	Textile													
	Charcoal													
	Beauty products											few	few	
	Auto -Spare Parts											few	few	
	Alcoholic Drinks													
	Electronics													
Services	Catering													
	Mechanics													
	Cleaning Services							few		few				
	Tailoring											few	few	
	Beauty													

	Available during both seasons	Mainly produced locally
	Available only during dry season	Mainly imported
	Available only during rainy season	Both produced locally and imported
	Not available	

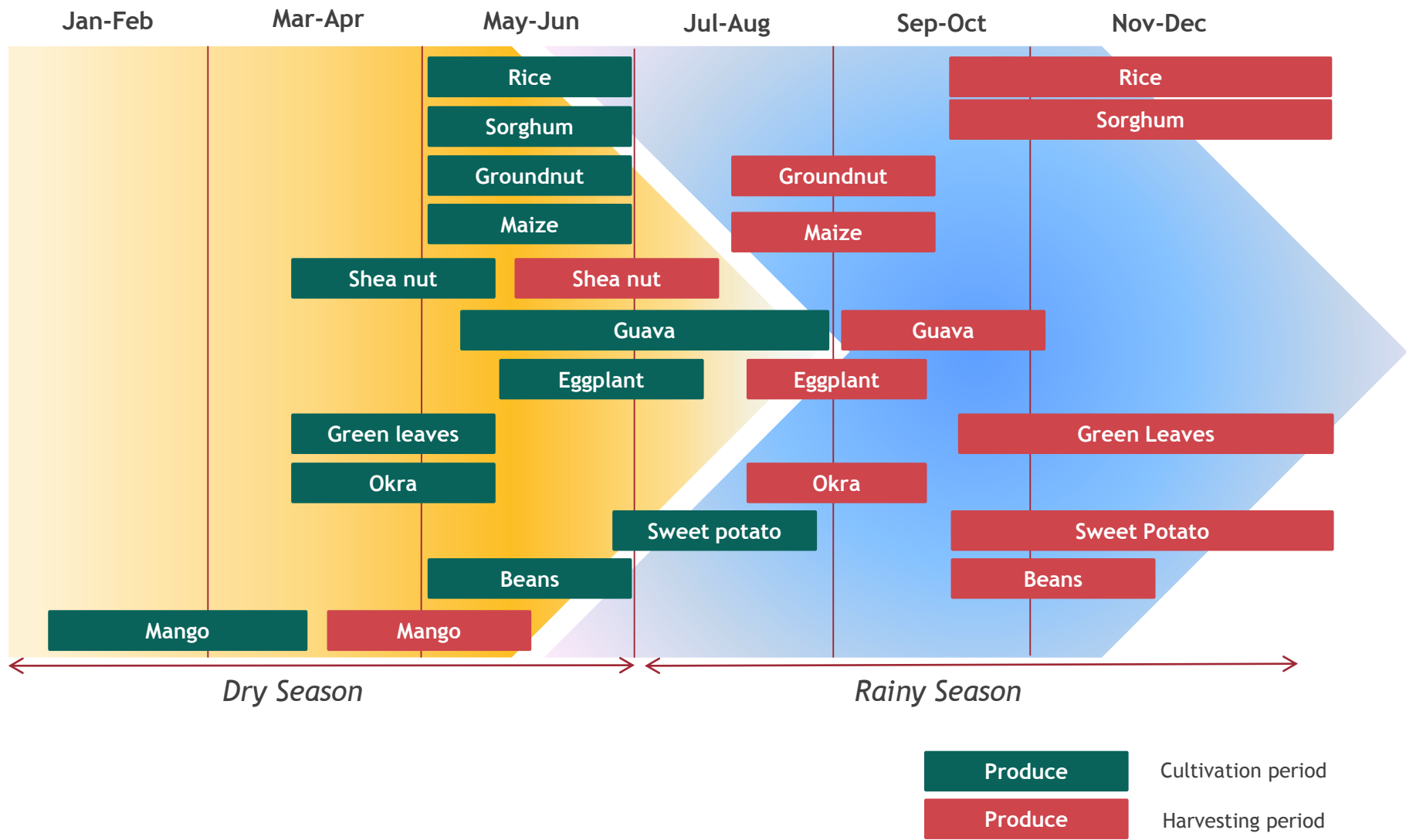
**Few:** indicates that the product is available but in small quantities

**Imported:** indicates that the product is mainly imported into that particular market

**Local:** indicates that the product is mainly locally produced in that particular market

#### 4. PRODUCTS > CULTIVATION AND HARVESTING PERIOD FOR SELECTED PRODUCE

Cultivation primarily takes place during the dry season and crops are harvested during the rainy season

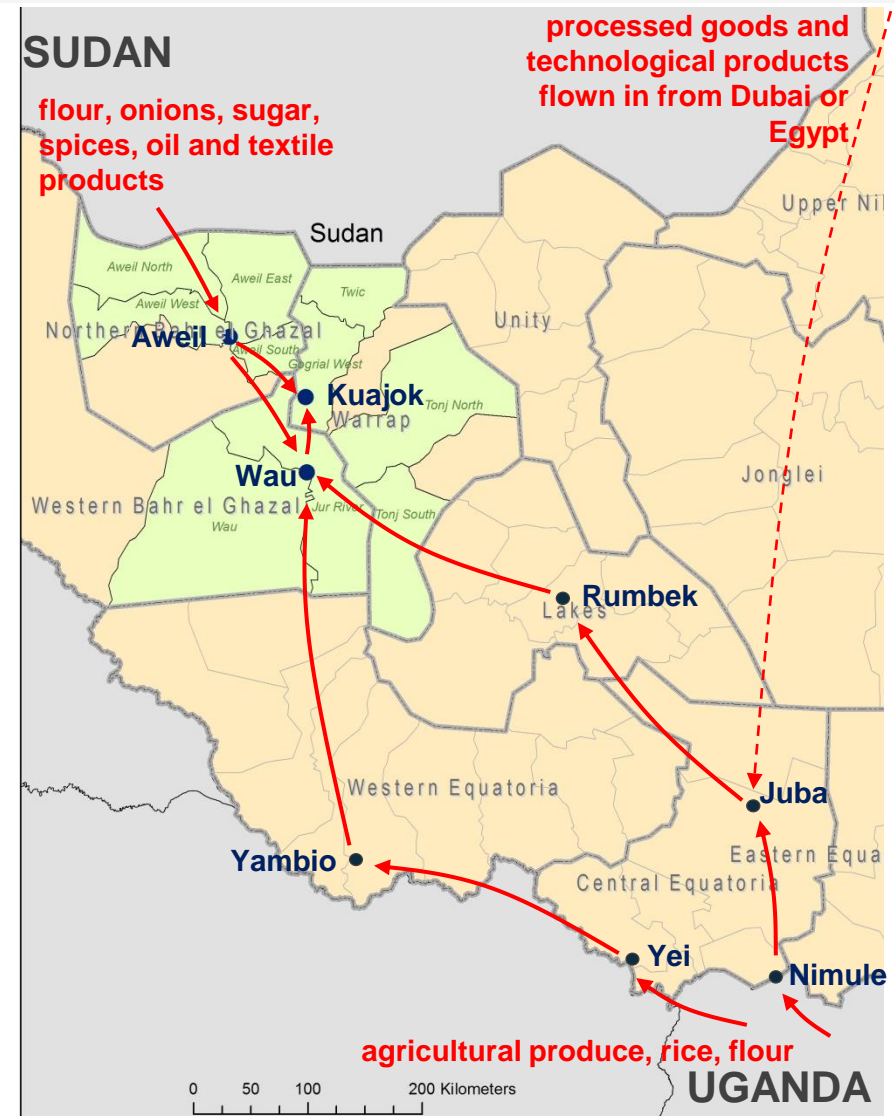


## 4. PRODUCTS > SOURCING (1)

Local agricultural production is not large enough to meet local demand. As a result, products are often imported from Sudan, Uganda and Kenya, via trucks and private cars

### Sourcing of products

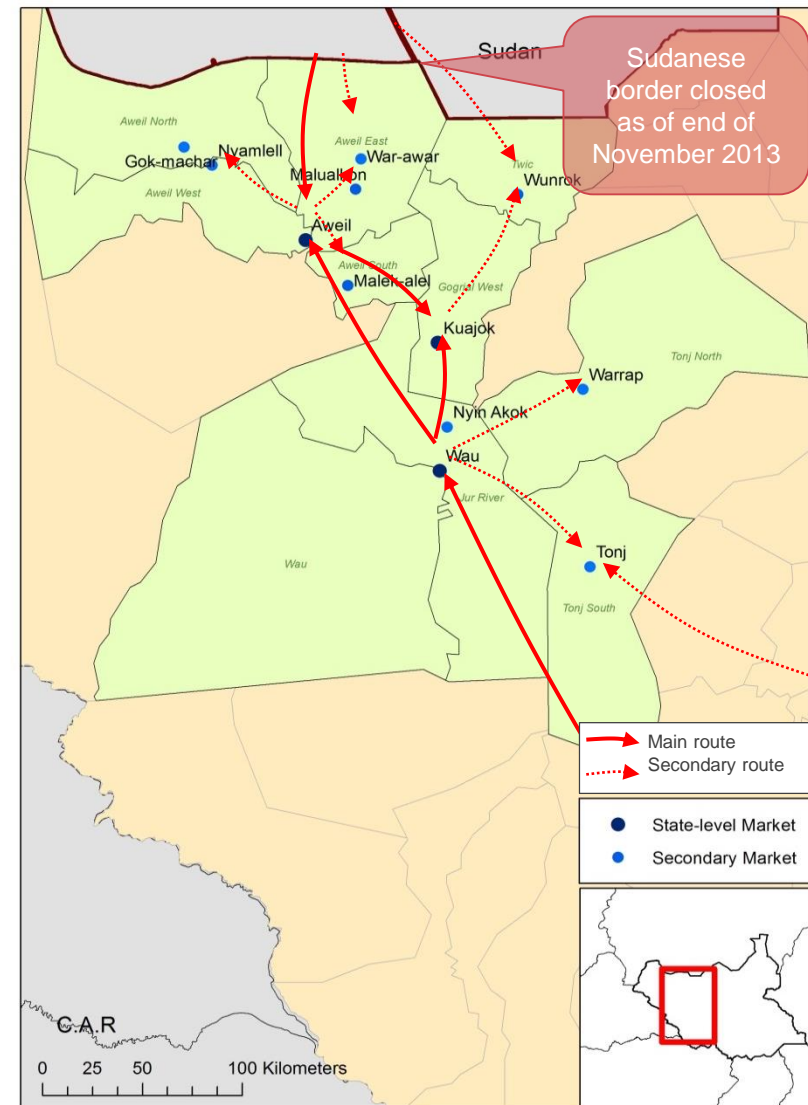
- Most local merchants are both producers and retailers. They cultivate farms or vegetable gardens and produce a variety of fruits and vegetables
- Local agricultural production is not large enough to meet demand. As a result, the majority of food items are imported from Sudan, Uganda and Kenya
- Uganda was reported to be the main source of imports for vegetables, oil, rice, beverages and other processed food
- Ugandan products are relatively cheap and therefore, creating competition for locally-produced agricultural and processed goods (e.g. sugar cane, eggplants, groundnut oil)
- The border with Sudan remains officially closed, which has a strong impact on neighbouring markets
- Despite the border closure, products are still smuggled from Sudan and can be found on markets (flour, onions, sugar, spices, drinks and processed foods are commonly found). This can be partly attributed to the large number of Darfuri and Kordofan merchants on the markets
- Some merchants bring processed food products from Juba
- Some goods, in particular technological goods, are imported from Dubai or Egypt



Wau, Aweil and Kuajok are trade hubs that supply secondary markets with local and imported produce

### Trade hubs and secondary markets

- Produce that are not grown locally are typically transported from one of the regional trade hubs, Wau, Aweil or Kuajok. These hubs are supplied throughout the year from Uganda and Sudan (prices and products available change with the seasons)
- Secondary markets are supplied by private cars, *boda-bodas* (public motorbike taxis) or bicycles
- Few trucks journey to secondary markets, because of poor road conditions. During the rainy season in particular, roads become very difficult for trucks to pass
- Climate factors and lack of agricultural skills contribute to shortages of vegetables and fruits in the secondary markets (e.g. Nyin Akok, Tonj, Warrap Malek Alel)
- Rice is still produced in small quantities in Aweil town by members of the local community. In Wau most rice schemes were damaged during floods and are reported not to be active anymore



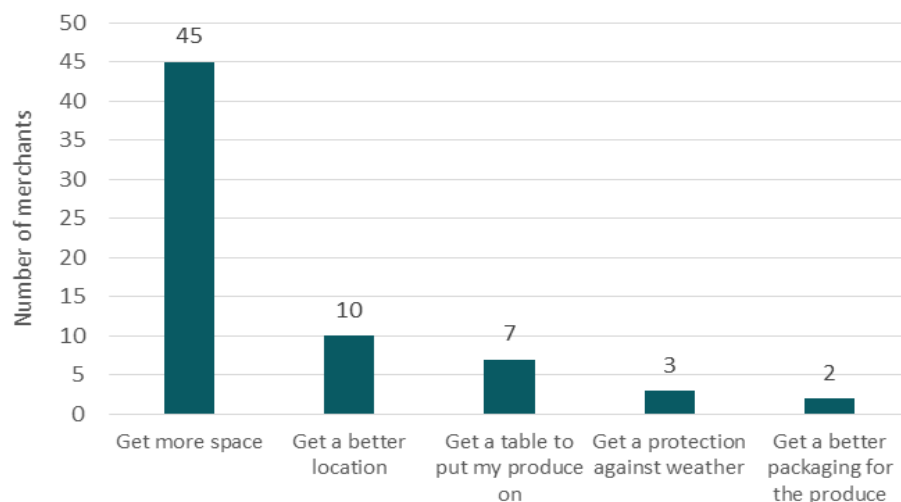
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## 5. CROSS-CUTTING ISSUES > FACILITIES IMPROVEMENT

Across all 12 markets, merchants strongly expressed a strong desire for larger stalls and storage space

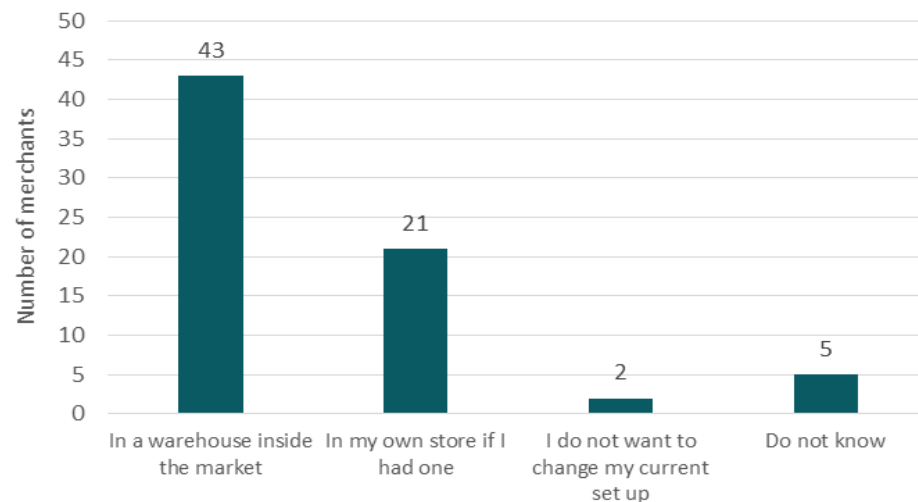
### Market upgrading



*If you had the opportunity to change your market setup, what would you change?*

- Merchants' primary desire is to have larger stalls to sell goods on
- Very few expressed a desire for protection from the elements and none expressed a desire for electricity
- Very few saw packaging as priority

### Storage improvement



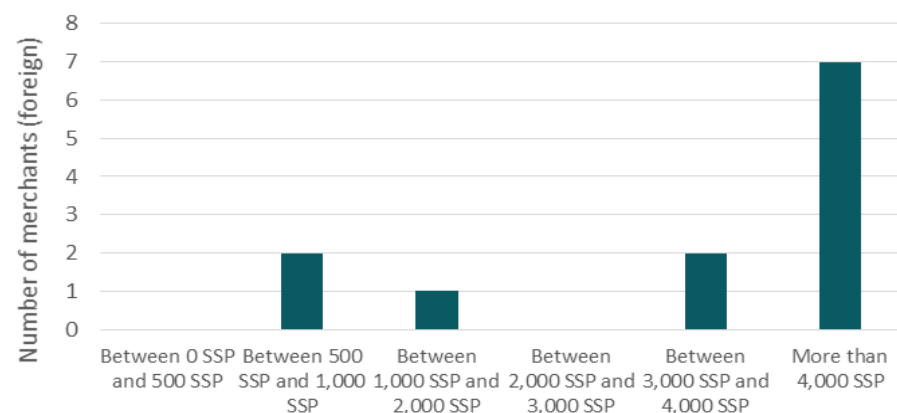
*If you had the opportunity to change the current storage system, where would you store your products?*

- Merchants favoured shared warehousing over individual storage
- Merchants see storage space as a way to save on transportation costs and increase products shelf life
- Some of those who preferred individual storage, within their store would pay someone to watch over their products at night if necessary

Foreign merchants typically have better access to finance than local merchants. This results in different levels of inclusion and influence on the markets, between the two groups

### Access to finance for foreign merchants\*

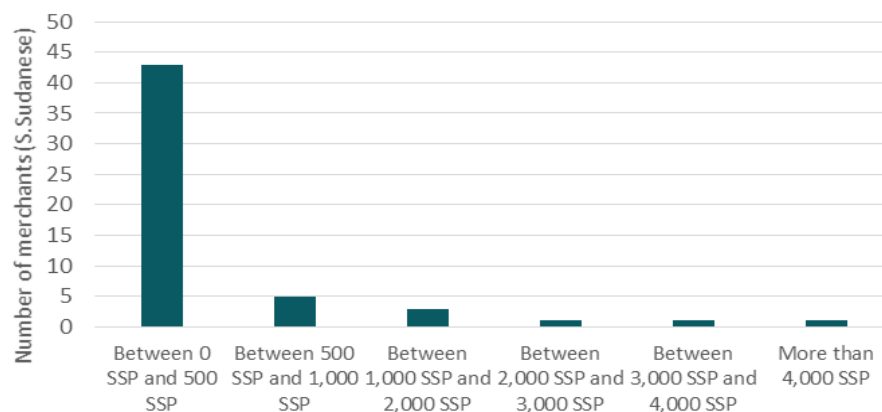
- Access to finance plays a large role in a merchant's ability to obtain the best locations and constructed stalls in a given market
- In medium and small markets, foreign merchants (Darfuri Sudanese in particular) operate from fully-constructed permanent stalls, while local merchants typically operate from semi-constructed stalls or sit in the open
- Foreign merchants often have access to financing via personal savings earned during previous economic migration. Libya was a common previous destination for economic migration



*How much funding did you need to start your activity?*

### Access to finance for South Sudanese merchants\*

- South Sudanese merchants generally invested less start up capital in their stalls. Most of them sell local produce that are grown on their own farms. This reduces transportation and supply costs
- Access to fully-constructed, permanent stalls is more difficult for South Sudanese merchants, as rental costs often exceed SSP 500 per month, whilst local merchants typically earn around SSP 1,000 per month
- South Sudanese women generally only sell vegetables and do not generate enough income to invest in better stalls



*How much funding did you need to start your activity?*

(\*) The bank rate was US \$1 for SSP 2.96 at the time of research (October 2013) but US \$1 could easily be exchanged at rates of 4.2 to 4.5 in the street (black market)

The Sudanese border closure affects both merchants and consumers. Prices increase during the rainy season because of crop wastage and increased transportation costs

### Sudanese border

- The border closure with Sudan has created supply challenges for markets in region, particularly in markets located close to the border. As a result of the closure, products that were imported from Sudan are now imported from Uganda and Kenya
- Merchants continue to smuggle goods across the Sudanese border using vehicles that travel at night and / or off the main roads
- The re-opening of the border would impact markets as follows:
  1. More products will be imported from Sudan, in particular into the secondary markets close to the border, where products from Uganda are less present. Merchants in these locations are often from Sudan and have networks that they leverage to import goods
  2. Prices will decrease as supply increases. Products from Uganda are typically more expensive than those from Sudan, due to higher transportation costs
  3. Re-opening the border will impact larger markets (Wau, Aweil and Kuajok) to a lesser extent, as they experience greater competition from goods imported from other countries anyway

### Climate difficulties

- Prices of nearly all products can increase substantially during the rainy season because of supply shortages due to flooded fields and blocked roads
- Local markets run short on goods, if they cannot be brought in from other regional markets

Market managers have little power on the market. Their main role is to create linkages between merchants and local authorities, collect taxes and dues

### Limitation to sound governance

- Market managers are merchants and sometimes farmers, who have been elected by their peers, appointed by local authorities or appointed by their predecessors
- Their role is limited to collecting taxes and solving problems between merchants. They have little power over the market as a whole
- Market managers are not paid by the local authorities, their only revenues come from their trading and farming activities. They do not have access to funding to cater for anything else than very basic market needs (e.g. cleaning services)
- Local authorities do not have enough funding available to upgrade market infrastructure or facilities
- Market improvements have been carried out by Mercy Corps in Maluakon (10 stalls were built) and USAID in Wunrock (a small indoor market area was constructed)

### Taxation system

- The taxation system is still very informal in most markets
- Taxes should be determined by incomes, but in reality, the market manager applies a system where he taxes merchants based on the size of their stalls and his perception of their level of activity
- Merchants with larger stalls are typically taxed SSP 200 and SSP 500 per month. This amount is often standardised
- Taxes decrease with the size of stalls and level of perceived activity
- Merchants on unconstructed, mobile stalls are charged less and sometimes not charged at all
- No market manager was reported to use weighing scales to gauge the quantity of goods sold
- Market managers collect market dues of SSP 10 and 25 on a weekly basis to cover for cleaning services. These dues are also based on size of merchants' stalls

Market land and stalls are owned by individuals from the local community who use them to trade, or rent them out

### Ownership of land and stalls

- Both market land and stalls are owned by individuals from the local community
- Merchants enter into agreements with landlords directly
- Most of the landlords inherited the land
- Access to market land works in the same manner as any other land. Buyers need to obtain a land title certificate from local authorities for around SSP 600
- Some merchants build their own stalls and need a permit from the local authorities
- Market stalls are owned by individuals who trade from or rent out the property

### Renting system

- When an agreement (typically an oral agreement) is made between two parties, the renting contract is activated
- Whilst some merchants own the land, the great majority rent it
- Foreigners, despite greater access to finance, are almost exclusively renting market land
- Rent is collected by the landlord with a periodicity agreed upon by the merchant and the landlord
- Neither the local authorities, nor the market manager are involved in the rental process

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Wau town is the capital city of Western Bahr al Ghazal state. It is directly linked to the cities of Aweil and Kuajok, making it an active trade hub

### Background on Wau town and Wau county

- Wau is the capital city of Western Bahr al Ghazal. It is located approximately 650km north-west from Juba at an elevation of 490m
- Wau is historically a trading town. It is directly linked to Aweil and Kuajok by road and to Juba via Rumbek
- Wau town had an estimated population of 151,320\* in 2008
- Over 9 different tribes are reported to inhabit Wau, the largest are the Dinka, Luo, Fertit and Arab tribes
- The Jur River crosses through Wau, irrigating surrounding fields
- In the past, there were local rice schemes, these were shut down following flood damage
- A small number of Internally Displaced People (IDPs) are reported to be living in Wau
- There are a significant number of economic migrants from Sudan and East Africa who trade goods and work in the service sector
- The main market sells agricultural produce, textiles and offers services
- There are a few smaller secondary markets in Wau, in addition to a livestock market in Bahr al Shargui (on the western side of town)

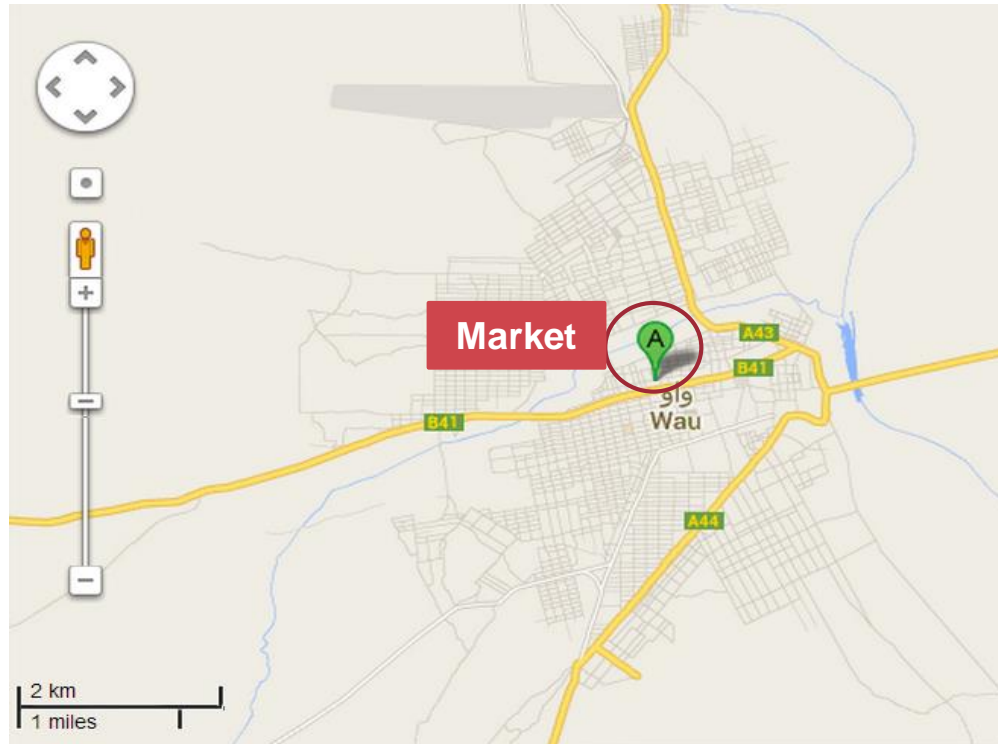
Source: (\*) South Sudan Census 2008, Central Bureau of Statistics



Map of Wau county, Western Bahr al Ghazal



Jau market, located in Wau town, is central and has easy access via a paved road. The market is roughly 150m x 110m



### GPS coordinates

Latitude

7°41'54" N / 7.69841669

Longitude

27°59'26" E / 27.9906402



Satellite picture of the Jau market in Wau, Western Bahr al Ghazal



Jau market is a large wholesale and retail market, comprising around 1,000 stalls. It is the largest and most significant market in Western Bahr al Ghazal

### Market description

- Wau market is a wholesale and a retail market that sells agricultural produce, processed goods and offers a wide range of services from hairdressing to vehicle repair
- It is the largest market in Western Bahr al Ghazal
- An estimated 85% of merchants are retailers and 15% are wholesalers
- Wau market is composed of approximately 900 to 1,000 stalls of different types:
  - Processed goods are generally sold on fully constructed, permanent stalls built with concrete and covered by iron roofs
  - Agricultural produce is generally sold on semi-permanent stalls, constructed from wood and covered with plastic sheeting
- Goods are displayed on tables or on the ground
- Wholesalers have larger stalls that are hidden from the main road inside small private warehouses. They sell a wide range of goods

### Market activity

- Market Days: Every day
- Market Hours: 7am to 5pm
- The market is busy and customers come from across the entire state
- According to the market manager, customers are typically women with little disposable income

### Market seasonality

- Activity peaks during rainy season, as prices soar and merchants' revenues increase
- Although the market operates throughout the dry season, there is less activity
- Prices of agricultural produce are reported to decrease by 50 % to 70% during the dry season

Local and foreign merchants operate on the market. Darfuri and Ethiopian merchants are reported having a particularly strong influence. Stall rentals can reach SSP 1,000 a month

### Profile of merchants

- Merchants on the market are from a large range of countries. Most foreign merchants are Sudanese, Ugandans, Kenyan, Congolese, Ethiopians and Eritreans
- Most merchants live in surrounding areas such as Lebel Kheir and Nimrah Talata. Merchants typically travel up to 30 minutes to reach the market during the dry season and up to 1 hour during the rainy season
- The market merchants interviewed were not engaged in any other form of economic activity
- Most merchants come to the market every day during both the dry and the rainy seasons

### Access to finance and costs

- Most merchants reported that they financed start up costs with family money
- On average, merchants established their businesses with SSP 100 - 500
- Rental costs start from around SSP 200 and rise to SSP 1,000 per month
- Merchants pay monthly taxes of SSP 700 to 3,000 to the market management. The amount paid is based on the volume of sales of each merchant
- Merchants were not asked to provide documentation to gain access to the market

### Vulnerable groups

- Female merchants represent around half of the workforce. They mainly sell locally-produced vegetables and offer catering services (e.g. selling tea or cooked food)
- Young merchants represent no more than 10% of the workforce
- IDP merchants were not reported to be active on the market

Jau market has a relatively strong management. Most merchants are satisfied with market governance, despite a lack of equipment and storage capacity

## Governance

- Market manager's name: Gabriel Yel
- Telephone: 0910593763
- In the position since 2006
- Elected by the merchants
- His role is to organise the market, monitor merchants' access to their locations and to solve problems when they occur
- He has strong relationships with local government representatives and reports to them
- He has plans to construct wider buildings so merchants have more space to display their goods although he is not empowered to conduct major changes



### Products offered by a Darfuri merchant in Jau market

## Facilities

- Most merchants store their goods at home and bulky goods are stored in the stalls
- No storage system currently exists outside of individual storage solutions.
- Most merchants would like to see a storage facility built on the market

### Case study of a vegetable merchant in Jau market



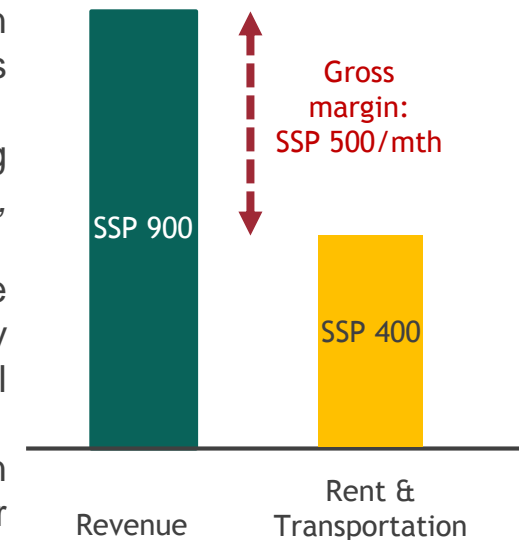
Okra merchant in Wau, Western Bahr al Ghazal

#### Profile

- Gen Ufu is a 20 year old South Sudanese female merchant
- She lives 20km from Wau. It takes her around 20 minutes to reach the market during the dry season and around an hour during the rainy season
- Trading is her main source of income and she comes to the market every day, during both the dry and the rainy season

#### Livelihood

- Gen grows her own produce at home (green leaves, okra, tomato and lemon) and travels with her produce to the market via motorbike
- At the time of interview, she was selling mainly okra sold at SSP 2 per *kom*, generating on average SSP 30 a day
- Gen pays SSP 200 rent per month to have access to a very basic stall without any storage capacity. She spends an additional SSP 200 on transportation
- She feels that access to storage facilities in the market and a larger stall would help her increase her revenue



Example of value addition in Jau market

Jau market is a large and busy market with a large supply of goods. Merchants could benefit from the provision of storage facilities

	Strengths	Weaknesses
Access	The market is accessible via a paved road. Well-spaced stalls allow easy circulation of people in the market	
Infrastructure	Busy market, square shape organised in blocks with clear separation between the stalls allows for straightforward access	Despite the will of the market manager to organize the market by product category, there is still an unclear division between product category and stalls
Facilities	Large number of permanent stalls, made of concrete and iron sheets	Due to lack of storage capacity, merchants store goods in their stalls or at home. There is no access to water or sanitation
Supply Chain	Large variety of goods including vegetables, spices, processed products (flour, sugar, rice, powdered milk) and services (hair dressing, nail polishing, tailoring)	Most goods are imported from Uganda, Kenya and Sudan
Processing and Marketing	Goods are displayed clearly on tables. An effort to market goods is made by most merchants. Some process peanuts (dehulling and pasting) and sorghum (grinding into flour) on the market	
Governance, Inclusion and Security	An elected market manager is present on the market. Merchants are from a mixed range of backgrounds and overall security is reported to be good	Governance is still limited and no entity was reported to have a budget to upgrade the market

GIZ could focus on the following interventions: support actors in the value chains of locally grown produce, and at the market level provide clean water and storage facilities

	Potential intervention	Rationale
Infrastructure and Facilities	Support the construction of a storage capacity (a rental system could be put in place for a simple cold storage)	Agricultural produce could be stored in the market to avoid transportation damage and to benefit from increased shelf life. Most merchants interviewed would like to store their goods in the market
	Support access to public water and sanitation	
Supply Chain	Foster the development of the fishing industry and boost presence of fresh fish stalls on the market	The Jur River runs through Wau. There is a lot of fishing activity, but no fresh fish stalls were found on the market (only dried fish)
	Support production of agricultural produce (with a focus on tomatoes, eggplants, rice and sugar cane) to substitute imported produce	Wau has easy access to water, that can be used to irrigate rice farms and sugar cane plantations. Tomatoes, eggplant and other vegetables are compatible with the local climate
Market Upgrading	Create synergies between regional markets by facilitating greater supply to nearby markets such as Nyin Akok or Warrap	Jau market is well supplied. Other regional markets that lack agricultural produce (e.g. Nyin Akok and Warrap markets) could be supplied by Wau



Nyin Akok is a small town north east of Wau town, in Jur River county

### Background on Nyin Akok and Jur River county

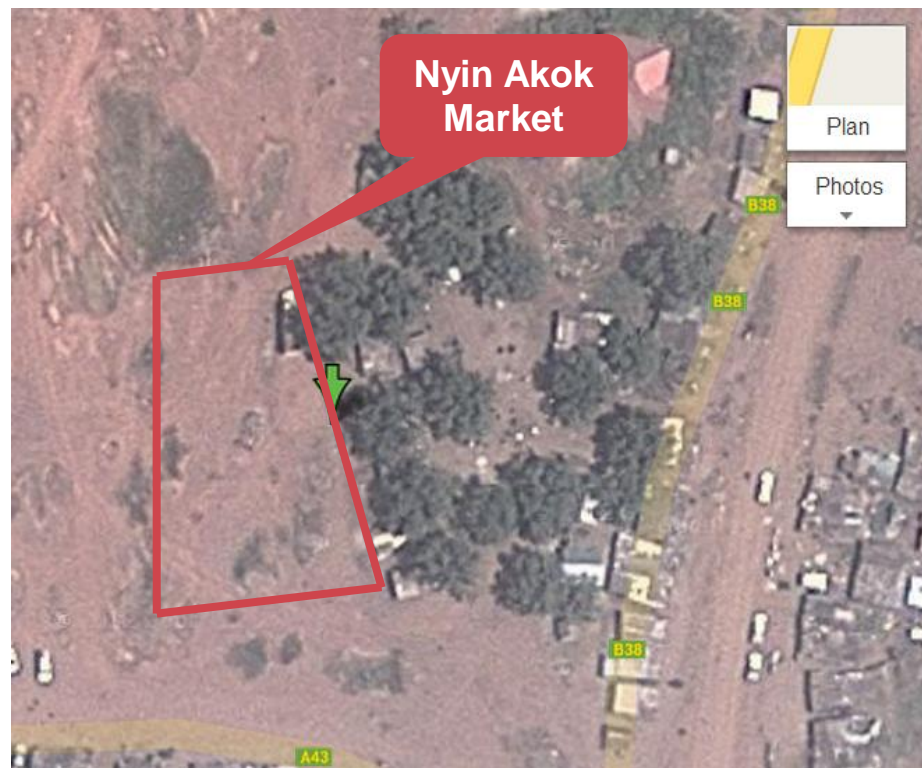
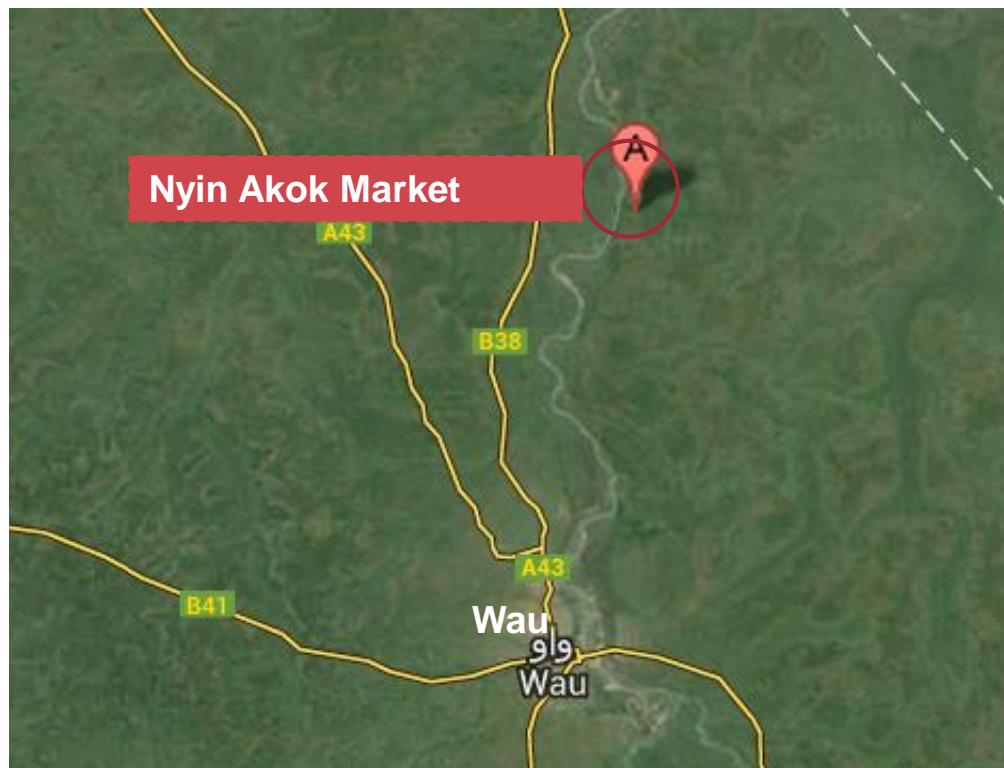
- Nyin Akok is a village of about 600 inhabitants, most of whom are of Dinka origin
- Located around 40km north from Wau, Nyin Akok is accessible via the B38 road to Kuajok
- Accessing the village is challenging during the rainy season when dirt roads are flooded
- From Wau, transportation by car can take up to 1.5 hours
- Jur River county had an estimated population of 127,771 inhabitants\* in 2008



Map of Nyin Akok village, Western Bahr al Ghazal

Source: (\*) South Sudan Census 2008, Central Bureau of Statistics

Nyin Akok is only 40 km north of Wau, but it is not on a main road and is difficult to reach via the unpaved road



Satellite picture of the Nyin Akok market, Western Bahr al Ghazal

### GPS coordinates

Latitude

7°55'22"N / 7.922778

Longitude

28°01'58"E / 28.032778



Nyin Akok market is a very small retail market comprised of around 50 stalls that sell almost exclusively agricultural produce. The set up is basic and activity is higher during the dry season

### Market description

- Nyin Akok market is a retail market mostly selling local agricultural produce
- There are no wholesalers on the market
- Nyin Akok market is comprised of around 50 stalls
- Most stalls are outdoor stalls that consist of merchants selling their goods on the floor
- Stalls are an average of 4 m<sup>2</sup>
- Most merchants display their produce on plastic sheets
- There are a few stalls constructed from wood, but these are used exclusively by caterers selling tea
- The market is very difficult to access by road during the rainy season as most roads are flooded

### Market activity

- Market Days: Every day
- Market Hours: 7am to 4pm
- The market has low activity
- Customers are exclusively people from the village or its surrounding areas, who use the market to purchase basic products
- Customers are reported to be mainly women

### Market seasonality

- The market sees higher activity and lower prices during the dry season, as road transportation is easier
- During the rainy season prices are up to two times higher

Merchants are primarily local Dinka. Vegetables and nuts are produced locally, which contributes to lower supply side costs for most merchants

### Profile of merchants

- Merchants on Nyin Akok market come from local tribes and live within 30km of the market
- Merchants typically travel 10 to 30 minutes to reach the market during the dry season and up to one hour during the rainy season
- Many merchants raised livestock before becoming merchants,
- Most merchants are farmers and retailers, and sell their own produce on the market
- Retailers typically work with family members, who intervene at different stages of the value chain
- The primary source of income for most merchants is the produce they grow and sell. This considered, they have to come to the market everyday to generate enough income to meet the needs of their households

### Inclusion of vulnerable groups

- Women represent 30 to 40% of the workforce on this market
- There are few young merchants. Young men are typically engaged in rearing livestock while girls remain at home to help in the household
- There were no reports of IDPs in Nyin Akok

### Access to finance and costs

- Most merchants started their business with their own money, or money from family and relatives
- On average, merchants started their businesses with less than SSP 100
- Merchants bringing produce from Wau spent between SSP 100 and SSP 500 per trip to cover for purchasing and transportation costs. Goods are transported by car or motorbike
- No market dues are paid as there is no market manager or authority on the market
- No documents are needed to set up a stall

Due to the small number of merchants and the relatively low need for governance, no market manager has been designated to the market

### Governance

- Nyin Akok is one of the smallest markets visited. It consists of a public place where merchants work at outdoor, mobile stalls and a few poorly built stalls
- At the time of visit, there was no governance system in place on the market
- Most merchants are from the same tribe. As the market is small and the majority of merchants know each other, problems are most often solved at the individual level
- Governance mechanisms could be put in place to formalize conflict resolution and to allow for oversight of external investment

### Facilities

- Nyin Akok market is not equipped with a common warehouse or storage capacity
- Few merchants have overnight storage capacity
- Most merchants store their goods in the place where they produce it (i.e. at the farm, or at home)

### Case study of a charcoal retailer on Nyin Akok market



Charcoal packaging in Nyin akok

#### Profile

- Mauien Ukel, around 30 years old, is a charcoal merchant on the Nyin Akok market
- He is South Sudanese from Dinka origin and lives in a village 20km from the market
- Before becoming a retailer, he was a pastoralist

#### Activity

- Mauien Ukel comes to the market everyday from 7am to 5pm, during both the dry and the rainy season
- Mauien sometimes sells his products from home, by displaying them on the roadside to attract customers
- Charcoal is sold in bags priced between SSP 5-20, depending on the size of the bag
- He employs a few individuals to support him in the charcoal production process
- His current focus is charcoal, but he would be interested in farming activities to produce vegetables such as green leaves and sorghum
- To improve his working conditions he would like to have a better stall that would protect him and his products from the elements and enable him to display his goods in a larger space

Nyin Akok market needs a better supply of goods and would benefit from the construction of stalls

	Strengths	Weaknesses
Access	The market is central to the village and access between stalls is easy as there are very few stalls	Accessibility from neighbouring towns (Wau or Kuajok) is limited due to poor road conditions
Infrastructure		Very small market (around 50 stalls), the majority of merchants sell their goods on the ground as few of them have access to permanent stalls
Facilities		No storage capacity, most merchants store their goods at home
Supply Chain		Very poorly supplied market with only a few locally produced products (groundnuts, red pepper, Lulu oil, eggplant, okra)
Processing and Marketing	Most merchants work on the whole value chain from production to retail	Goods are displayed on the ground
Governance, Inclusion and Security	No security issues reported. Good inclusion of women on the market	No market manager, or development plan for the market

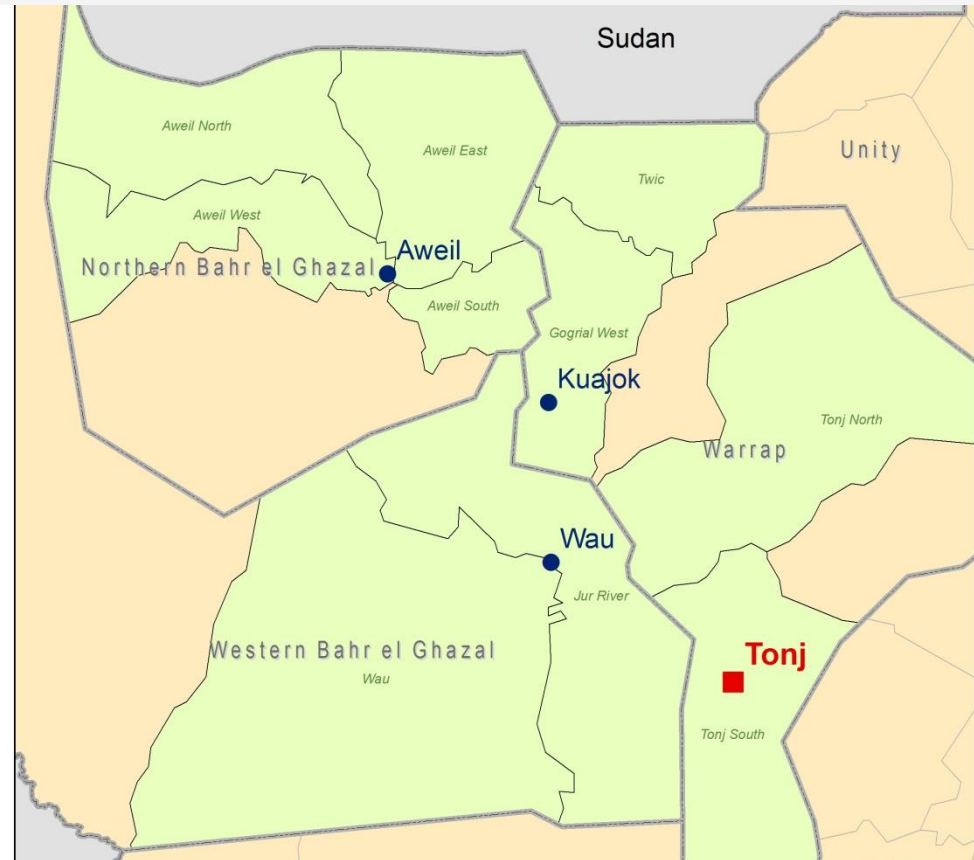
It is recommended that GIZ focus on increasing supply from nearby markets and foster local production, in addition to investing in market stalls

	Potential intervention	Rationale
Infrastructure and Facilities	Support the construction of stronger stalls, protecting merchants and goods from rain, wind and sun	Better infrastructure would give merchants better working conditions and protect goods from damage
	Develop access to public water and sanitation	
Supply Chain	Foster local production of vegetables by training the local population on how to grow tomatoes, eggplant, pumpkin and sugar cane	Sorghum, sugar cane, tomatoes and green leaves could be produced (or produced in greater quantity) locally and sold on the market
	Support transportation of processed goods from Wau to supply the market with locally grown products	The market is close to Wau, where goods could easily be transported from (in particular vegetables)

Tonj is a small and isolated town. It is difficult to access but has reasonable potential for livestock

### Background on Tonj town

- Tonj is a very small town in Tonj South county in Warrap state
- The city is organised on both sides of the main road coming from Wau and going to Rumbek
- Total population in Tonj South county was estimated at 86,592 inhabitants in 2008\*
- Tonj is only 65km away from Wau, 70km from Warrap and around 100km away from Rumbek. However, the poor quality of the roads means it takes 3 to 4 hours by car to reach each of these locations
- During the rainy season, roads can be cut off, leaving the city isolated from the main trade routes
- Tonj is bordered by the Tonj River to the east
- The largest tribal group is Dinka and the second largest group is Bongo
- Livestock is the main source of livelihood and the livestock market is quite active
- In October 2013 the neighbouring city of Thiet was struck by floods, damaging crops within the area

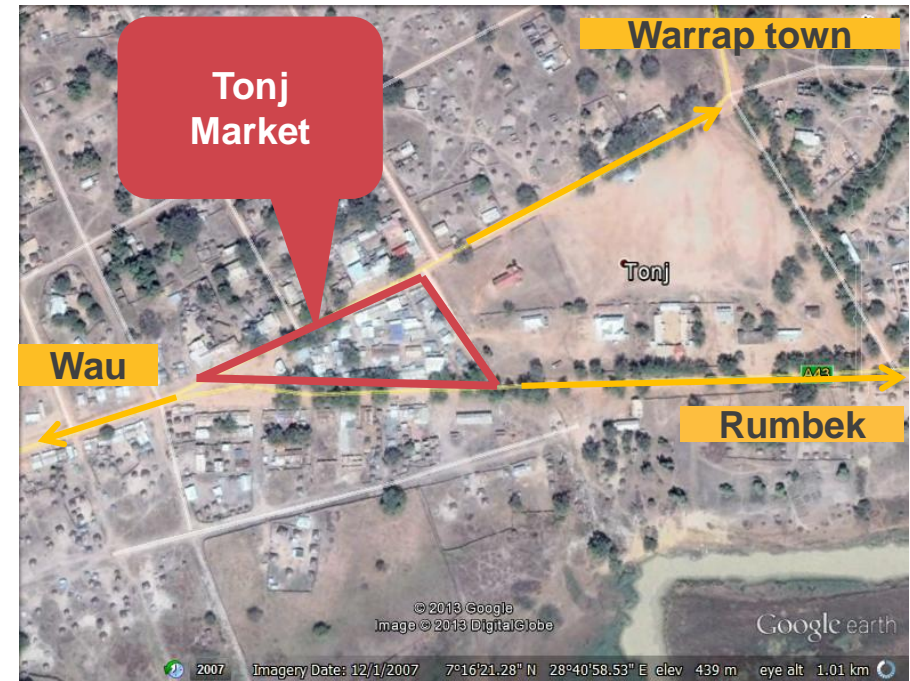


Map of Tonj South county, Warrap state

Source: (\*) Sudan Census 2008, Central Bureau of Statistics



Tonj is located at about 65km south east from Wau on the A43 road



Satellite picture of Tonj market, Warrap state

### GPS coordinates

Latitude

7°16'21"N / 7,272374994

Longitude

28°40'37"E / 29,5825978



Tonj market is a medium size retail market with around 120 stalls and a large presence of merchants selling textile

### Market description

- Tonj market is a retail market selling both transformed goods, in particular textile products (70-80% of stalls) and food produce (20-30% of stalls)
- The market is easy to access via a paved road on the main road that divides the city. The market is located just after the roundabout, where the road splits into two to Rumbek on one side and to Thiet on the other side
- There are about 120 stalls
- The market has a triangle shape and is divided into an area where predominantly foreigners sell mostly textile (80% of merchants) and another area where predominantly local merchants (around 20%) sell food produce
- The area where foreign merchants are located has larger and better constructed wooden stalls than the other
- The stalls are typically 5 to 8 m<sup>2</sup>. Some of them have lockable fences on the shop front
- Local merchants sell okra, groundnut paste, dry fish, onions and sorghum
- Local merchants typically sell their produce on the ground, or on small wooden tables
- At the centre of the market, is a large 15 m<sup>2</sup> meat stall, constructed in wood and entirely covered



Fishermen on the Tonj river in Tonj town

Tonj market is open every day but is more active during the dry season, when it is more accessible

### Market activity

- Market Days: Every day
- Market Hours: 7am to 4pm
- The market has limited activity, and most customers come from within the county
- A great proportion of customers are women
- Most customers have little income
- According to merchants, there is little competition on the market

### Market seasonality

- Market activity peaks during the dry season
- The market remains active during the rainy season
- Most prices increase by 10 to 50% during the rainy season, depending on products



Stall selling basic food items (flour, sugar, rice and spices) in Tonj town

Merchants are mostly Darfuri Sudanese selling imported goods. Local merchants predominantly sell meat and local agricultural produce

### Profile of merchants

- 70-80% of merchants are from Darfur and South Kordofan
- Sudanese merchants typically have better quality stalls to display their goods in a marketable way
- Most Sudanese merchants are young men (aged 20-30) and are economic migrants to South Sudan
- Most of the products sold are imported and sourced from Sudan and Uganda
- The local Dinka and Bongo merchants are the second largest community on the market, mostly selling goods produced by themselves, or their families
- Ugandan, Ethiopian and Eritrean merchants were reported to have a small presence on the market

### Access to finance and costs

- Sudanese merchants declared having started their businesses with around SSP 1,000 mostly through self funding
- Local merchants also used their own money to invest in the initial start up. The amounts invested by local merchants was typically smaller, i.e. SSP 100
- Rent for stalls ranges from SSP 150 to 700 per month
- Taxation ranges from SSP 100 to 2,000 depending on the type and volume of products sold
- No documentation is requested from merchants wishing to have stalls on the market

Tonj market governance is limited linking merchants to the local authorities, in particular for tax collection. A public access to water is the main equipment available in the market

### Governance

- Market manager's name: Bushara Abdelkarim
- Telephone: 0921117102
- In the position since 2007
- Appointed by Tonj South county Commissioner
- His role is to be the coordinator between merchants and the local administration. He is responsible for collecting tax and solving problems between merchants

### Facilities

- Tonj market is not equipped with storage facilities, but the majority of stalls are big enough for merchants to store their products inside
- Merchants without large stores would be keen to have access to a storage facility on the market
- There are no sanitation facilities in the market except one point to access water



Customers and merchants in Tonj market

## 6.4 FINDINGS PER MARKET > TONJ > STRENGTHS AND WEAKNESSES

Tonj market is a small isolated market in the south of Warrap state. Its location makes it difficult to supply. Availability of infrastructure and inclusion of local population are low

	Strengths	Weaknesses
Access		Tonj town is very difficult to access due to poor quality roads. The journey from neighbouring towns is about 3 hours
Infrastructure	The market is organised, with most stalls visible and easy to reach. There is a free access to water	
Facilities		No storage equipment in the market, most merchants store their goods in their stall
Supply Chain	Presence of meat retailers	Poor supply of vegetables and fruits. Large (over)supply of textile products
Processing and Marketing		Local merchants process produce on the dirt ground in the local market
Governance, Inclusion and Security	Low presence of local merchants. Despite no reported security problems, most merchants declared being afraid of thefts and attacks on the market. Some referred to the recent attack of one of the merchants (following a personal dispute) that lead to his death. At the time of field visit, there were a large number of government security present in the market	



GIZ could focus on developing local production of fruits and vegetables. Interventions that improve inclusion of the local population on the market can also be considered

	Potential intervention	Rationale
Infrastructure and Facilities	Support public sanitation on the market	Better equipment to give merchants better work conditions
	Support the construction of improved stalls for local merchants and encourage better display/marketing of produce	Help local producer sell their produce
Supply Chain	Encourage fishermen to sell their produce inside the market	The Tonj River is very close to the market and fishermen currently sell their catch on an ad hoc basis
	Support the creation of rice schemes and production of sugar cane	Rice, sugar cane, sweet potatoes and sorghum could be produced locally and sold on the market
	Facilitate local production of vegetables such as tomatoes, eggplants, green leaves, okra and sorghum	



Kuajok, the capital city of Warrap state, is a busy and active economic centre on the road to Sudan

### Background on Kuajok and Gogrial West county

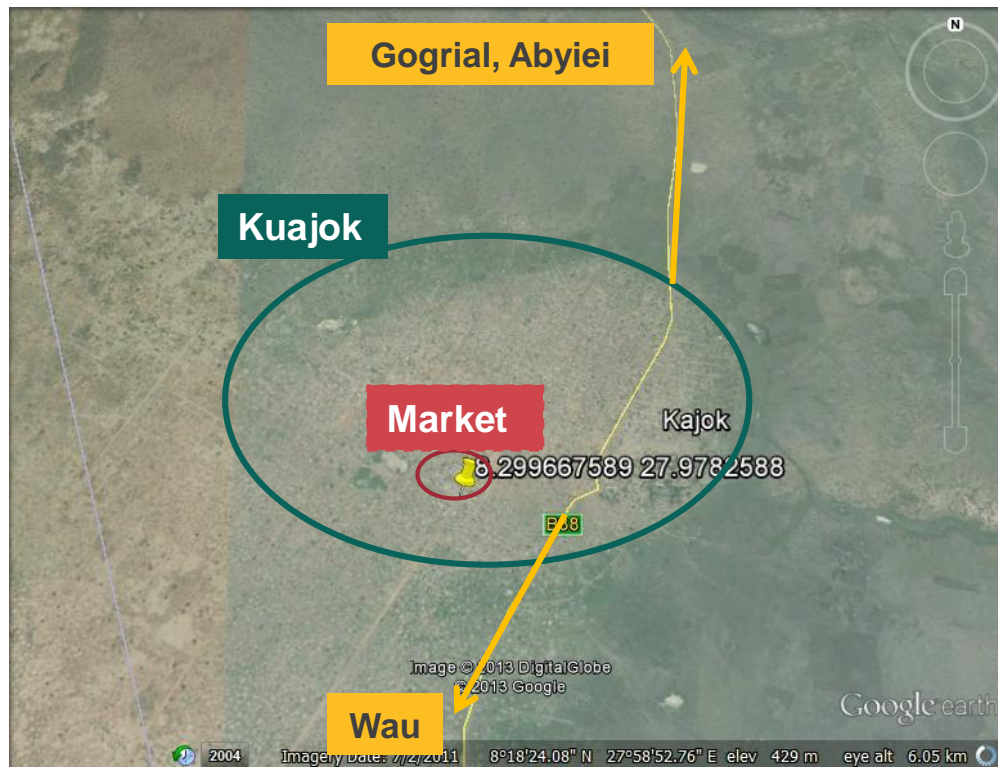
- Kuajok is the capital city of Warrap state and is located in Gogrial West county
- It is located 690km from Juba, 100km north of Wau and 32km south of Gogrial
- Kuajok is located on the B38 highway that links Wau to Babanusa
- The Jur river crosses the city on its west side
- The population of Gogrial West was estimated at 243,921 in 2008\*
- The county is mostly inhabited by Dinka people
- Kuajok is a trade hub that attracts people from the surrounding villages and counties



Map of Kuajok, Warrap State

Source: (\*) Sudan Census 2008, Central Bureau of Statistics

Kuajok market is located on the B38 highway between Wau and Abyei through Gogrial. The market is located in the centre west of the city



Satellite picture of main market in Kuajok

### GPS coordinates

Latitude

8°17'57"N / 8.299667589

Longitude

27°58'42"E / 27.9782588

Kuajok market is a busy market that attracts people from the entire county. In terms of size and produce, it can compete with Jau market in Wau

### Market description

- Kuajok market is a large retail and wholesale market located in the centre of the city
- The ratio retailers to wholesalers is around 4:1
- The market has a rectangular shape and is organised around perpendicular streets
- There are over 500 stalls that sell a great diversity of products, including textiles, processed goods and food products
- Stalls are made from wood and are relatively large (as large as 25 m<sup>2</sup>). Merchants use tables to display their produce



Main market in Kuajok, Warrap state

### Market activity and clientele

- Market Days: the market is open every day but is busier on Mondays, Tuesdays and Wednesdays
- Market Hours: 7am to 7pm
- It is the largest market in the state and it benefits from a relatively high volume of customers
- The market manager considers Kuajok market to be in competition with Wau market, as they are two large markets less than 100km far from each other
- Customers are mainly women and show large disparities in terms of purchasing power

### Market seasonality

- The market is active during both seasons, but is thought to be more active during the rainy season
- Prices decrease by up to 50% (depending on the product) during the dry season



Darfuri merchants are numerous and fewer numbers of Ugandan and Kenyan merchants also share Kuajok market with local merchants

### Profile of merchants

- Most merchants are foreigners, with origins in Sudan, Uganda and Kenya
- The most influential community is the Darfuri community (around 80% of merchants in the market)
- Most merchants live in surrounding villages (e.g. Pariang, Mathiang or Angui) and travel for 30 minutes to 1 hour to reach the market
- South Sudanese merchants were typically engaged in livestock or in the family farm before starting trading
- South Sudanese merchants tend to work alone or with relatives, but rarely employ non-relatives on their stalls
- Most South Sudanese merchants would like to diversify the products they sell
- Prices are set in line with local competition

### Inclusion of vulnerable groups

- Women represent no more than 5% of the workforce and mainly sell vegetables
- Young people mostly sell processed foods and clothes
- Around 10% of merchants are IDPs, who mainly sell vegetables and bread

### Access to finance and costs

- Start up costs on this market are relatively high. This can be partly attributed to high rental costs
- Most merchants reported having started their business with at least SSP 500. Merchants who import goods from Sudan and Uganda had start up costs of up to SSP 2,000
- Monthly rents are between SSP 300-600 on average
- Market dues vary and depend on type and quantity of products sold. Dues are collected on a weekly basis by the market management
- Most merchants are not required to produce documents in order to open stalls. One reported being asked for his trading license

Kuajok has a strong management that links merchants with local authorities. No storage capacity has been set up, despite the market management's and merchants' desire for one

### Governance

- Market manager's name: Aguil Majok
- Telephone: 0955956434
- In the position since 2011
- Designated by the local authorities
- The management team on the market is relatively heavy, with around 16 members organised around the chairman, his deputy and a secretary
- The role of the chairman is to coordinate merchants, to deal with local authorities and to collect taxes. He quoted that he is currently working on a plan to reduce market prices
- His main objective is to advocate for the local authorities to support the opening of national banks that could lend money to merchants

### Facilities

- The market is not equipped with a storage facility, although most merchants and the manager would like to see one in place
- Most merchants store their produce in their stalls



Okra and green leaf merchants in Kuajok

Kuajok market is a competitive market with a diversity of goods and produce available. Improved local production could have a very positive impact on the market

	Strengths	Weaknesses
Access	Kuajok market is easy to access on the B38 highway from Wau	
Infrastructure	The market is large (around 500 stalls) and organised in blocks, making most stalls visible	No water and only private sanitation facilities available. A majority of stalls are poorly-built
Facilities		No storage equipment in the market, most merchants store their goods in their stall
Supply Chain	Well supplied, with a wide diversity of goods	No fresh fish stalls regardless of proximity to the river
Processing and Marketing	Merchants clearly display their goods both in and out of their stalls	
Governance, Inclusion and Security	Active management team with plans to improve market conditions	



GIZ could focus on developing local production of rice, sugar cane and some vegetables, in addition to improving storage capacity and access to water

	Potential intervention	Rationale
Infrastructure and Facilities	<p>Support the building of storage equipment, water and sanitation facilities</p> <p>Support the creation of two or three water points</p>	<p>Increased storage would reduce damage to food products and enable larger volumes to be sold. Water and sanitation facilities contribute to cleaner market conditions</p> <p>Access to water is easy to set up, gives more comfort to merchants and enables a better display of vegetables and fruits (watering them to keep them fresh)</p>
Supply Chain	<p>Support local production of rice, maize, sugar cane, potatoes</p>	<p>Kuajok is too dependent on imports as local production is not sufficient to cater for the population of the city/county</p>
Governance, Inclusion and Security	<p>Encourage the inclusion of the local population in the market, in particular through the integration of more meat and fish stalls</p>	<p>Local population is in need of livelihood opportunities and improved food security. Access to better stalls may enable them to make more income</p>

Malualkon is a small village inhabited mainly by Dinkas whose main livelihood is stock-raising

### Background on Malualkon and Aweil East County

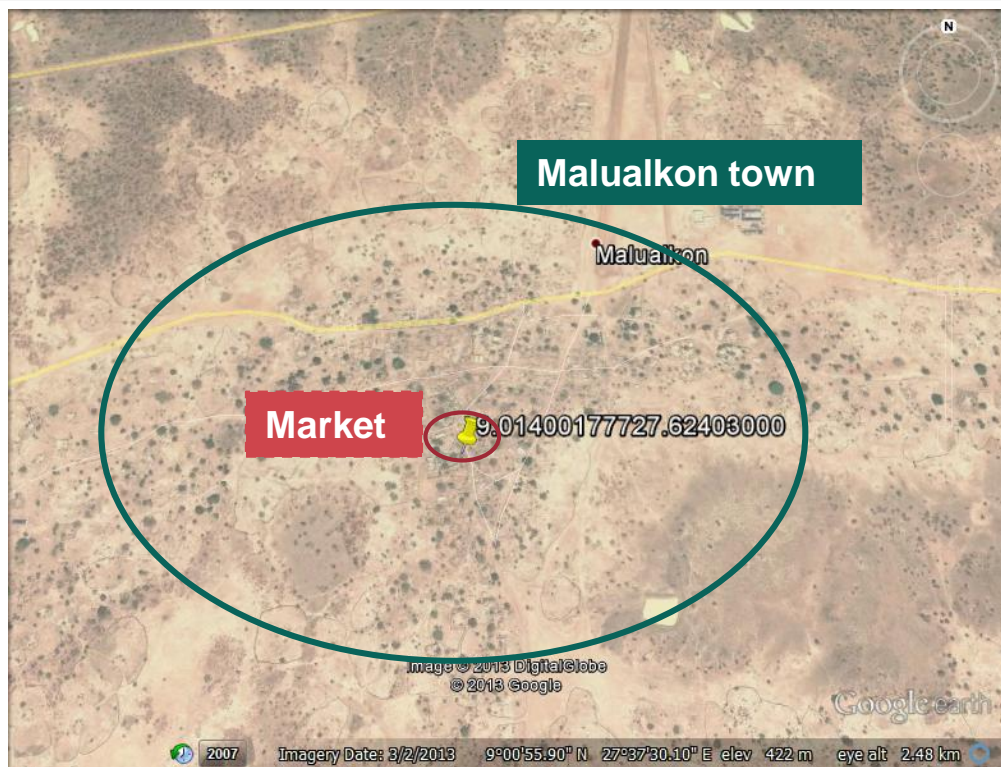
- Malualkon is a village located in Aweil East county, Northern Bahr al Ghazal
- It is 40km north east from Aweil town and 80km north west from Kuajok
- Dirt roads make access to Malualkon very difficult during the rainy season
- Most people are of Dinka origin and their livelihood is primarily stock-raising
- The total population of Aweil East county was estimated at 309,921 inhabitants in 2008\*



Map of Malualkon, Northern Bahr al Ghazal

Source: (\*) Sudan Census 2008, Central Bureau of Statistics

Malualkon is not located on the two main north western roads – the A43 and B38 – which makes it a destination difficult to reach.



Satellite picture of main market in Malualkon, Northern Bahr al Ghazal

### GPS coordinates

Latitude

9°0'50"N / 9.014001777

Longitude

27°37'27" / 27.62403000

Malualkon is a large but poorly equipped market. Of the approximately 500 merchants, very few have proper stalls

### Market description

- Malualkon market is a small but crowded retail and wholesale market with very basic infrastructure and organisation
- There are around 500 merchants but only 30% of them have proper stalls with fully constructed structures
- Most of the stalls are made of wood and grass
- Very few have tables to display their products on sale
- There are about 50 wholesalers on the market
- The market is spacious as few merchants have stalls and there is room for more merchants or facilities

### Market activity and clientele

- Market Days: Everyday but less active on Saturdays and Sundays
- Market Hours: 8am to 7pm
- Customers are mainly women

### Market seasonality

- The market is active during both seasons, but is thought to be more profitable during rainy season as prices of products rise due to the scarcity of goods as a result of the flooded roads
- Prices increase by 30% to 70% (depending on the product) during the rainy season



Merchant selling processed products, onions and edible oil in Malualkon



### Merchants are all local South Sudanese mostly without proper stall nor equipment

#### Profile of merchants

- All merchants within Malualkon market are reported to be South Sudanese, from local tribes
- Most merchants live in Malualkon and had been farmers before starting a trading activity
- They purchase products they sell from local farmers, or Ugandan / Sudanese merchants
- Many of the merchants with no permanent stalls display their products on small tables or inside plastic buckets
- They have very limited equipment, have no tills or weighing scales to help them in their day to day business

#### Inclusion of vulnerable groups

- Women represent about 30% of the workforce on the market and primarily sell vegetables
- 20% of merchants are reportedly IDPs

#### Access to finance and costs

- Most of the merchants started their business with their own money or support from their family, remittances were also quoted as a source of financing to start an activity in the market
- The average merchant needed between SSP 100-500 to start the business and to cover for rent, initial supply and transportation costs
- Start up costs are higher for merchants selling imported goods
- There is no renting costs for most retailers, as they do not have proper stalls
- Wholesalers can pay up to SSP 200 per month to have access to a proper stall

The market manager has been in the position for 15 years. The market does not benefit from any storage or sanitation equipment

### Governance

- Market manager's name: Ben Maror Kuol
- Telephone: 0917451056
- In the position since 1998
- Elected by other merchants
- His role is to collect taxes and duties, solve problems on the market and advise merchants on product prices

### Facilities

- There is no storage facility and merchants with lockable stores store their produce overnight inside their stalls
- Most merchants store their produce at home



Picture of the market manager in Malualkon



### Case study of a successful wholesaler in Malualkon market

- Garang Kuol Ader is a South Sudanese wholesaler operating on the Malualkon market
- He is the head of a 10-person household and selling goods is his only source of revenues
- He lives in Malualkon with his family and it takes him 10-30 minutes to walk to the market during both the dry and rainy season
- Unlike most South Sudanese merchants on the market, Garang has a proper stall and is a well established wholesaler. He employs four people
- He started his business thanks to a micro-credit loan from an NGO and received approximately SSP 4,000
- He is now a wholesaler and earns around SSP 1,000 per month
- He pays weekly taxes to the government
- He sells a variety of products ranging from flour, sorghum, sugar, sodas to motorbike spare parts
- He would like to diversify its offering and sell cement to improve his income
- He gets most of his products from Ugandan and Sudanese suppliers
- He pays SSP 500 per month to rent the stall
- If he had the financial means, he would build his own stall with his own adjacent warehouse



Wholesaler in Malualkon Market

### Malualkon market is a large market but lacks basic infrastructure

	Strengths	Weaknesses
Access		Malualkon market is quite difficult to access during the rainy season due to poor road conditions
General Infrastructure	The market is large with around 500 merchants	Few merchants have permanent stalls and there is no water and sanitation system
Facilities		There is no storage equipment in the market, most merchants store their goods at home or in their stalls
Supply Chain	Wholesalers are getting transformed goods from Sudan and Uganda despite the very difficult access of the town	Presence of local vegetables and fruits is limited
Governance, Inclusion and Security	Women and IDPs are present in the market	The market manager has been in place for long but does not seem to have had any significant impact on improving market conditions

GIZ could focus on increasing and promoting local production, support the construction of permanent stalls and work with the market management to improve market equipment

	Potential intervention	Rationale
Infrastructure and Facilities	Support the building of permanent stalls in concrete or wood	There are only 150 permanent stalls for 500 merchants on the market
	Support the creation of water and sanitation facilities	There is currently no water nor sanitation facility although it would help merchants improve work conditions
Supply Chain	Support local production of potatoes, onions and maize	Malualkon is largely dependent on imports from Uganda and Sudan and local production is insufficient, in particular during the rainy season

Wunrock is a small rural town in the very north of Warrap state, not far from the Abyei region

### Background on Wunrock and Twic County

- Located in the south of Twic County, Wunrock is a small town inhabited by the Dinka Twic community
- Total population of Twic county was estimated at 204,921 in 2008\*
- Wunrock is located on the road between Kuajok and Abyei
- It is located 75km north east from Aweil but there is no proper road to link the two cities and the distance can take up to three hours even during the dry season. It is 61km north from Gogrial, from which there is easier road access (journey time is roughly 1.5 hours)

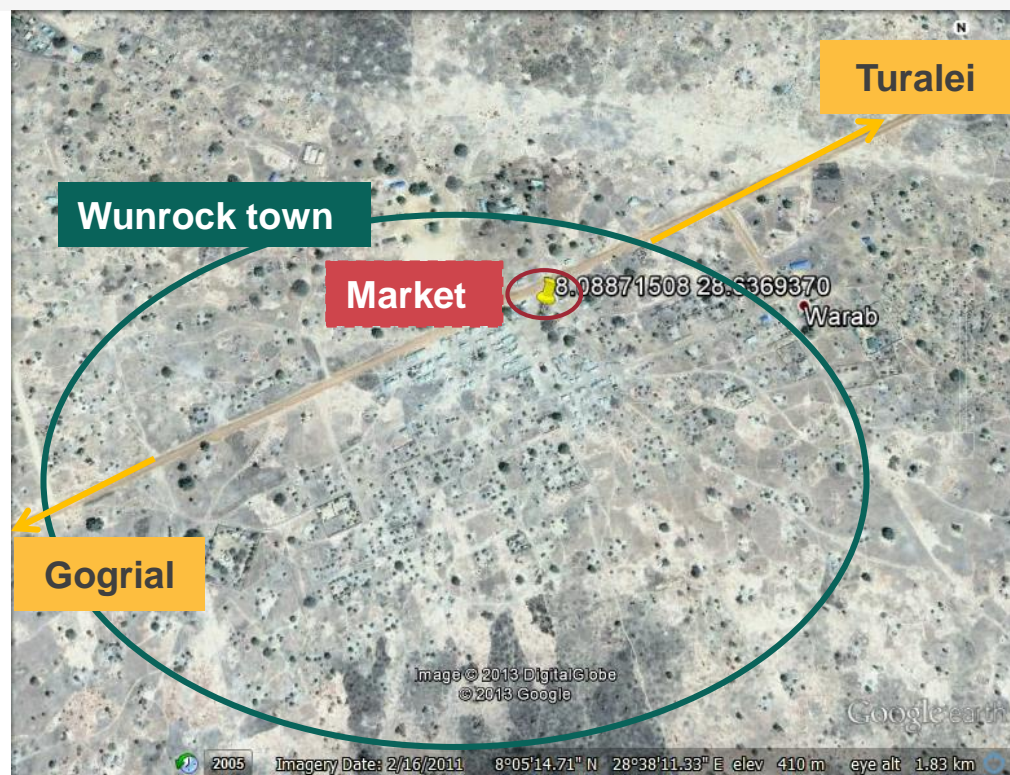


Map of Wunrock town, Warrap state

Source: (\*) Sudan Census 2008, Central Bureau of Statistics



Wunrock is close to the border with Sudan and difficult to reach



Satellite picture of main market in Wunrock, Warrap state

### GPS coordinates

Latitude

8°59'32"N / 8.992112548

Longitude

28°18'3"E / 28.30079437

Wunrock market is a small market with around 120 stalls positioned randomly and with no clear demarcation

### Market description

- Wunrock market is a small wholesale and retail market accessible via dirt road
- It has around 120 stalls that sell both processed goods and agricultural produce
- 90% of merchants are retailers and 10% are wholesalers
- The stalls are very basic, made of wooden poles and covered with plastic sheets
- Stalls are relatively large compared to other markets, from 25-50 m<sup>2</sup>
- A large covered area is dedicated to women

### Market seasonality

- The market is active during both the dry and the rainy season but was reported to be more profitable during rainy season as prices rise due to the scarcity of goods
- Prices can increase by 50-70% during the rainy season

### Market activity

- Market Days: Everyday
- Market Hours: 8:30am to 7pm

### Market clientele

- Customers come from within the town or the county
- Most customers are women who are end consumers and have very limited income



### Most merchants in Wunrock market are from Darfur, a market showing little inclusion of vulnerable groups

#### Profile of merchants

- The largest and most influential community on the market is the Darfuris as they have good networks and sufficient capital to import products and transport them into the market. They have access to the biggest stalls
- South Sudanese merchants have smaller stalls and very few of them import products. They sell local vegetables, charcoal or buy processed products from wholesalers
- Most merchants live inside the town and have a small distance to cover from home to the market (10 to 30 minutes)
- Most Sudanese merchants are of Twic Dinka origin and reported that they were engaged in livestock before becoming merchants
- Merchants go to the market everyday, during both seasons, as trade is their only source of income
- They reported that they set prices of their products based on the purchasing power of the clientele on the market at a given moment, rather than on supply or on competitors' prices

#### Inclusion of vulnerable groups

- Women represent only 5% of the total workforce on the market. They sell mainly clothes, charcoal, vegetables and provide catering services (tea)
- Young people represent 20% of merchants
- 5% of merchants are IDPs who sell charcoal and provide catering services

#### Access to finance and costs

- Merchants reported requiring between SSP 500-1,000 to launch their business. These relatively high initial investment levels can be partly explained by the isolation of Wunrock and its high transportation costs
- Merchants pay SSP 100-300 per month to rent stalls (negotiated on an individual base with the landlord)
- Most profitable merchants pay a tax of about SSP 600 per month collected weekly by the market manager on behalf of the local authorities
- Poorest merchants are tax exempt or pay a small amount rarely exceeding SSP 25

### The market manager sees agricultural schemes as a priority

#### Governance

- Market manager's name: Ring Bol Reec
- Telephone: 0912774086
- In the position since 2005
- Was elected by other merchants
- His role is to coordinate merchants and local authorities on access to the market, tax collection and to solve problems when they occur
- He would like to open a large scale agricultural scheme to supply the market, if he can access enough capital to do so



Market manager in Wunrock

#### Facilities

- There is free access to water and sanitation
- There is no warehouse on the market and most merchants store products in their stalls (for non-mobile merchants) or at home
- The market has a large covered space dedicated to women, which was funded by USAID (see picture on the right)



Covered space in Wunrock market (funded by USAID)

Wunrock market is quite well supplied considering its remote location. Some support could be given to improve access to permanent stalls and increase inclusion of local merchants

	Strengths	Weaknesses
Access		Remote market and difficult to access, particularly during the rainy season
Infrastructure	Presence of a public water and sanitation facility	Small and disorganised market with only few merchants benefiting from constructed stalls
Facilities		No storage equipment in the market, most merchants store their goods at home or in their stalls
Supply Chain	Wholesalers getting transformed goods from Uganda despite the very difficult access of the town	Despite the variety of products present on the market, supply is not sufficient for the county, or town. Many basic goods are in scarce supply
Governance, Inclusion and Security	The Market manager has plans for the market but does not have the funding to implement them. Many stalls are randomly-located and an effort to group merchants by product categories could be made. Support could be given to local merchants who have less economic power than Darfuris	

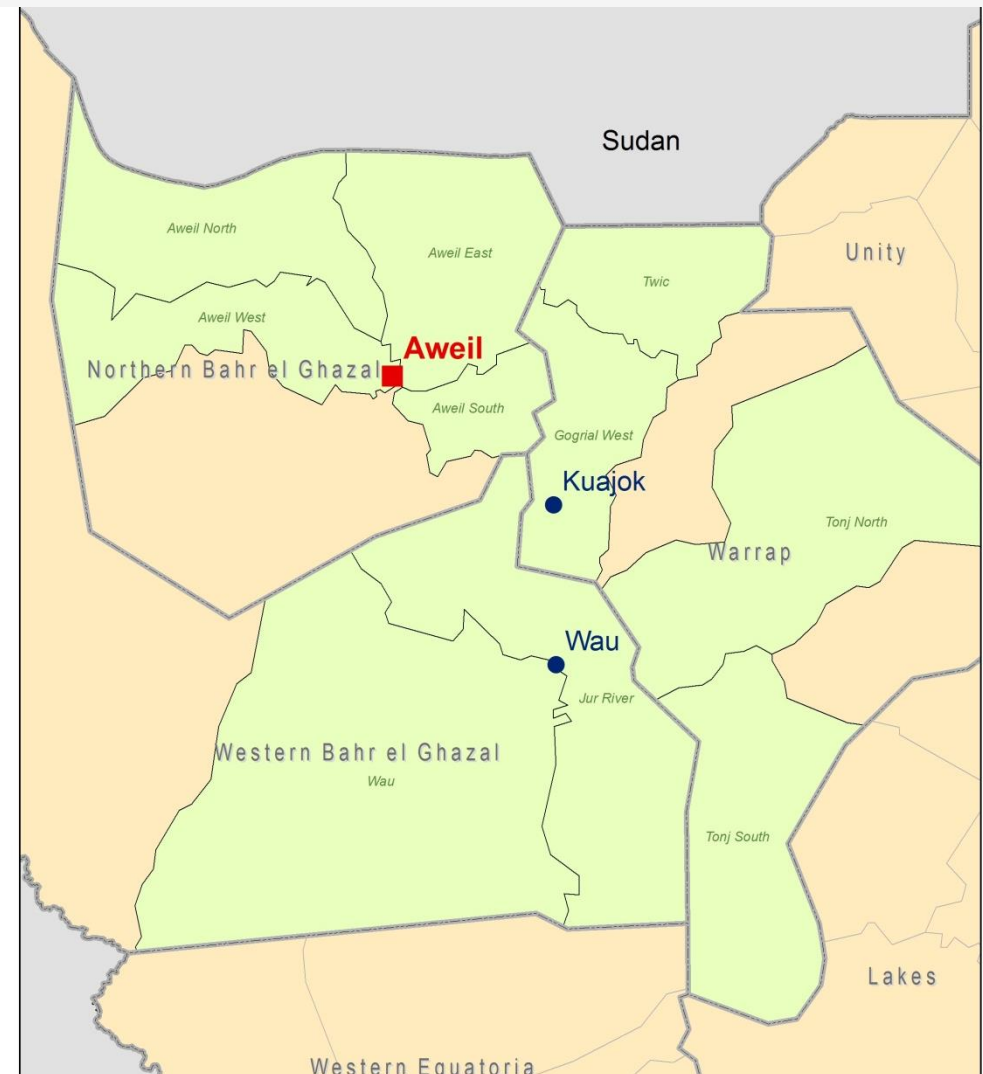
GIZ could focus on developing local production and on supporting the creation of permanent stalls and a storage system

	Potential intervention	Rationale
Infrastructure and Facilities	Support the building of stalls	Most merchants have mobile stalls that are not protected from wind, rain or sun
	Support the creation of a storage system	Most merchants are not able to store products on the market and would like to do so
Supply Chain	Support local production of maize, sorghum, sugar cane, okra and onions	Wunrock is heavily dependent on imports from Uganda and local production is insufficient, in particular during the rainy season
Governance, Inclusion and Security	Support market management in their plan to create agricultural schemes in the county	Better organisation of the market would encourage customers to come more often to the market
	Advocate for a better inclusion of local merchants and balance influence of Darfuri merchants	Inclusion remains limited

Aweil town is a developing northern city with a mix of local population and migrants from neighbouring countries

### Background Aweil town and county

- Aweil is the capital city of Northern Bahr al Ghazal state not far from the border with the Republic of Sudan
- Aweil is located 800km north west from Juba and 156km north west from Wau on the A43 road and 60km away from Kuajok, with no major road linking the latter
- Aweil is an economic hub in the north of the country
- The total population of Aweil town was estimated at 41,827 in 2008\*, (although this has been disputed by Médecins Sans Frontières who estimated it to be 100,000 in the same year)
- The two main tribes are the Luo Jurchol and the Dinka Malual
- The main livelihoods are farming and stock-raising



Map of Aweil, Northern Bahr al Ghazal

Source: (\*) Sudan Census 2008, Central Bureau of Statistics



Aweil market is located in the centre of town between St George's church and Aweil Civil Hospital



Satellite picture of the main market in Aweil town,  
Northern Bahr al Ghazal

### GPS coordinates

Latitude 8°59'32"N / 8.992112548

Longitude 28°18'3"E / 28.30079437

Aweil market is a large and busy market organised in blocks. There is a great variety of products and a predominance of textile goods over food produce

### Market description

- Aweil market is a large wholesale and retail market located in the city centre
- Access to the market is made easy by the main road
- There are about 800 stalls of which around half of them are properly constructed. The remaining half is composed is made of plastic sheets and other basic materials
- The ratio wholesalers to retailers is roughly 1:3
- Concrete stalls are often covered with iron sheets
- The market is well supplied with both food and non-food items
- Approximately two third of merchants are selling textile products
- Stalls are quite small as space is scarce on the market. On average, stalls are 6-8m<sup>2</sup>

### Market activity

- Market Days: Every day
- Market Hours: 7am to 6pm
- Most customers come several times a week to shop on the market and they prefer to come in the morning or early afternoon (before 2pm)
- Customers reported that bargaining was quite easy for them since a lot of retailers are selling very similar products
- Popular products in the market are meat, milk, flour, vegetables as well as different types of accessories (glasses, electronic devices etc.)

### Market seasonality

- The market is open during the dry and the rainy season, but is thought to be more active during the rainy season
- Aweil market is the only market where prices were reported to be comparable from one season to another

The market is competitive and access to finance is key to generate income. Vulnerable groups are active, but male merchants from Darfur have the most influence

### Profile of merchants

- Merchants are from various origins. The largest groups are local South Sudanese, Darfuri Sudanese and Ethiopians
- The market manager reported that Darfuris have a particularly strong influence on the market
- The majority of merchants live in Aweil town or in nearby *bomas*. However, some come from very far to sell their produce. Merchants from across the entire state travel to Aweil to sell their produce (Aweil East and North counties for instance)
- Education levels on Aweil market appear higher than elsewhere. Many merchants have received vocational training (in hospitality management, mechanics, IT, etc.) and some have been teachers before becoming merchants
- Most merchants work with relatives or employ 1 to 3 individuals to help them
- Merchants set prices based on the level of affluence on the market

### Inclusion of vulnerable groups

- Women represent about 20% of the total workforce. They mainly sell vegetables and also work in catering services, selling food and drinks
- Young people represent 20% of the merchants most of them being mobile merchants, selling accessories (sunglasses, beauty accessories, mobile accessories)
- About 5% of merchants are IDPs who sell accessories or offer catering services

### Access to finance and costs

- Merchants with a permanently constructed stalls reported having started their businesses with more than SSP 4,000
- As competition is strong and imports generate higher revenues, merchants typically import a large range of products, including technological goods
- Rents are between SSP 250-800 per month depending on the size / type of stall. Merchants selling products on the ground do not pay rents
- Transportation is an important cost for merchants, as products can travel up to 2,000 kilometres or more to reach the market



The market is well organized and merchants have to be registered. A storage capacity and access to water and sanitation are available to merchants

### Governance

- Market manager's name: Wol Amuk
- Telephone: 0912226518
- In the position since 2010, he has been elected by the merchants
- His role is to coordinate merchants and local authorities on access to the market, tax collection and to solve problems
- His plans are to improve the quality of the roads so that more products can be brought to the market
- All merchants are asked for business permits or trading company registration. Foreigners are asked for passports and valid work permit

### Facilities

- There is a private access to water and sanitation on the market that costs SSP 1
- There is a warehouse accessible to merchant on the market but few of them use it. Most merchant prefer to cover their products and pay someone to watch them, as it is cheaper than getting access to the warehouse



Merchants selling local produce in Aweil town

Aweil market is a very competitive market with a strong governance and a diversified supply of products. Inclusion of local population and access to better stall can still be improved

	Strengths	Weaknesses
Access	The market is relatively easy to access by road from Wau. Market is central to the town	
General Infrastructure	Market structured in blocks and by product categories. Presence of a water and sanitation system	Many merchants are without proper stalls
Facilities	Presence of a storage facility...	...but many merchants prefer to store their products in their stalls and pay someone to watch them
Supply Chain	Great variety of products on the market	High proportion of textile products compared to local needs
Governance, Inclusion and Security	Presence of a market manager, most merchants are asked for documents, pay rents and taxes	<p>Most prominent merchants are Darfuris</p> <p>Many merchants reported being afraid of thefts</p>



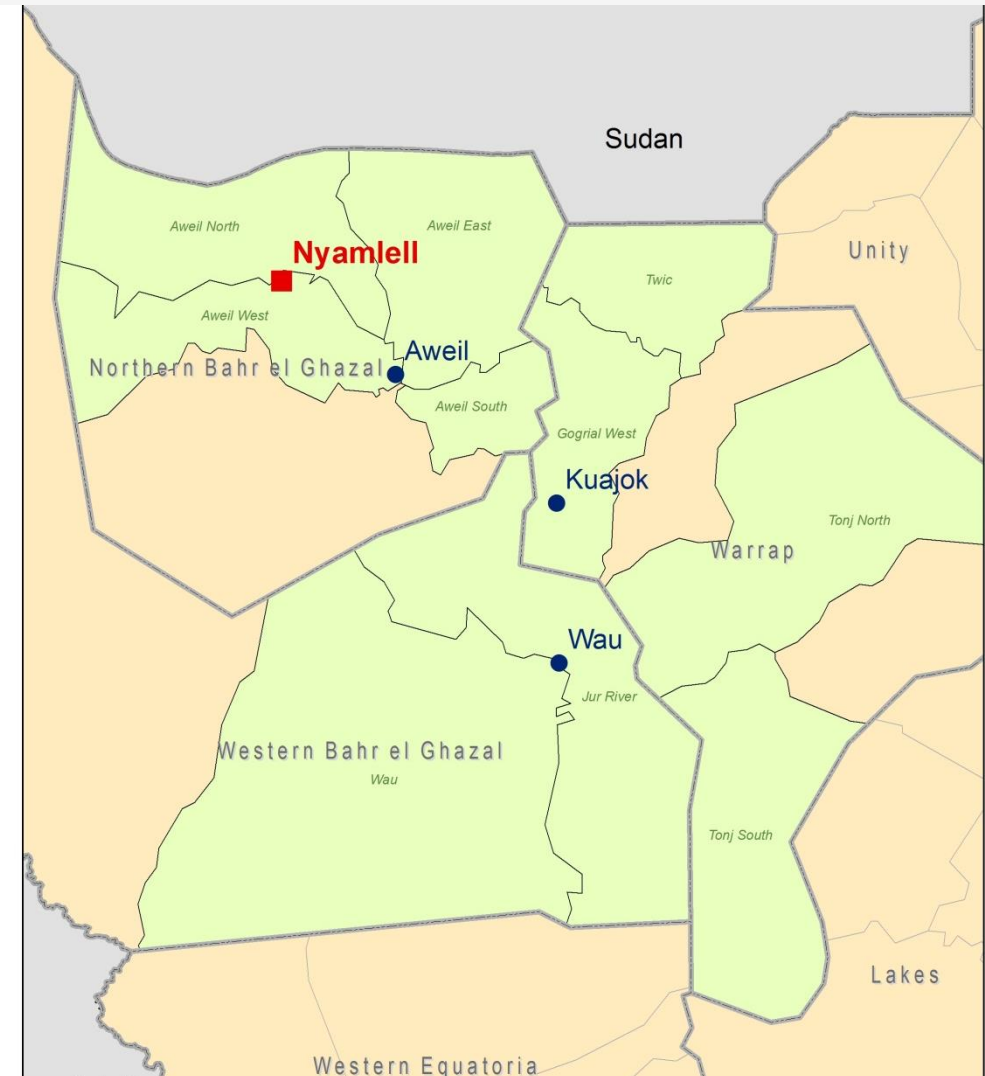
We would recommend GIZ to focus on developing local production and enable inclusion of local population on a market highly dominated by imported products

	Potential intervention	Rationale
Supply Chain	Encourage local production of rice, sugar cane, fruits and vegetables	Local production remains insufficient
	Create schemes for a higher inclusion of stalls selling food items	Too many stalls sell non-food items (clothes and accessories)
Governance, Inclusion and Security	Advocate for a better inclusion of local merchants and balance influence of Darfuri merchants	Development of value chains around local produces would benefit the community

Nyamlell is a small but populated town close to the Sudanese border. Located in the north west of Northern Bahr al Ghazal, it is a relatively isolated town

### Background on Nyamlell and Aweil West county

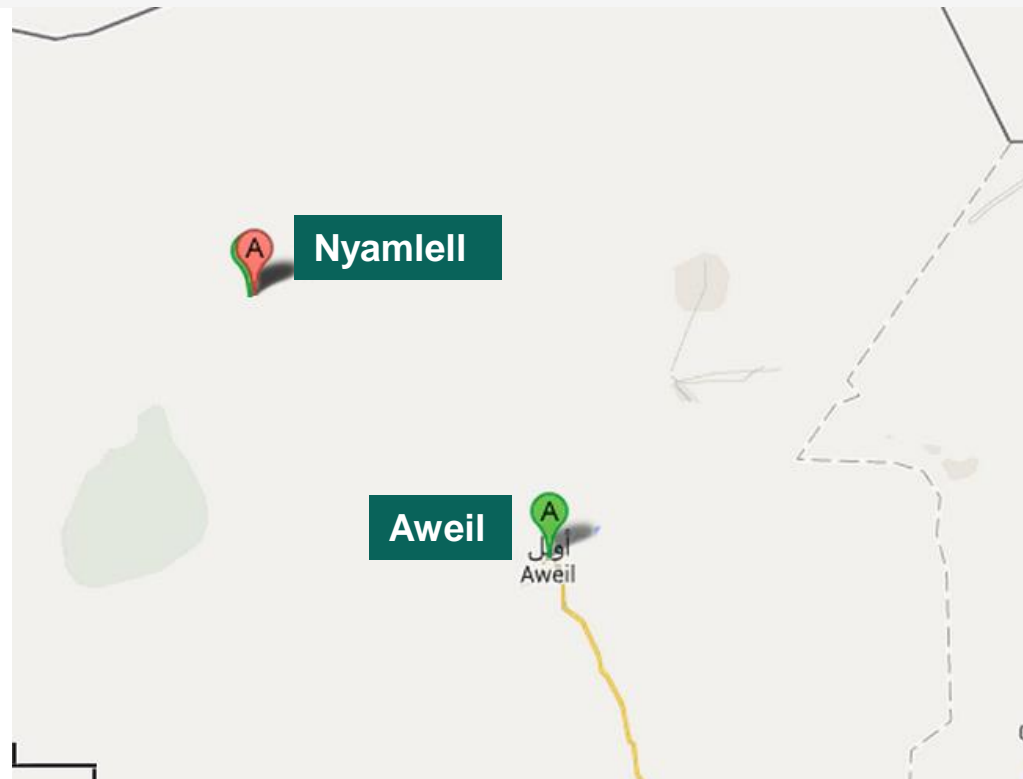
- Nyamlell is a small town in Aweil West county
- It is located 45km north west of Wau but is not easily accessible as no road links the two cities
- No accurate figures for the population of Nyamlell are available. The total population in Aweil West county was estimated at 166,217 in 2008\*
- The local population is mainly of Dinka origin
- The Nyamlell Rive passes by the northern side of the town. There is a high volume of fishing activity along the river, in addition to traditional Dinka livestock raising activities



Map of Nyamlell, Northern Bahr al Ghazal

Source: (\*) Sudan Census 2008, Central Bureau of Statistics

Nyamlell market is located on the east side of town, close to the river



Satellite picture of main market in Nyamlell, Northern Bahr al Ghazal

### GPS coordinates

Latitude

9°8'0"N / 9.133465284

Longitude

26°58'44"E / 26.97882137

Nyamlell is a small retail market that experiences higher activity during the dry season. Customers are mostly from within the county

### Market description

- Nyamlell is a small retail market with very few permanent, fully constructed stalls. This old market occupies a large space in town with no real demarcation where a majority of merchants come and sell their products
- There are about 60 stalls and few semi-constructed stalls are made of wood or concrete and are covered with iron sheets
- The size of mobile, outdoor stalls does not exceed 5 m<sup>2</sup>
- Two wholesalers are active on the market
- This market is facing increased competition with a new market, Souk Jedid, which is attracting more and more customers

### Market seasonality

- The market is open during both the dry and the rainy season, but is less active during the rainy season due to the scarcity of goods as a result of flooding
- The market has more merchants during the dry season as many merchants are also farmers and focus on farming activities during the rainy season

### Market activity

- Market Days: Everyday
- Fridays and Sundays are less busy because of prayer days for Muslim and Christian merchants
- Market Hours: 7am to 8pm

### Market clientele

- Customers typically come from within the county and have little disposable incomes
- Despite the short distances, customers can take up to 1 hour to reach the market during the rainy season, because of flooding

Nyamlell merchants are mostly local. Stalls are very basic. Women focus on selling vegetables and overhead costs are slightly less than in other markets

### Profile of merchants

- Most merchants are both producers and retailers
- Merchants typically sell vegetables such as okra and green leaves
- Most merchants live in the county, in nearby villages such as Keuic, Atong Alal, Agwen or Akangap and take 30 minutes to one hour to come to the market
- There are merchants from a wide range of backgrounds, including Sudanese, Ugandans, Kenyans and Ethiopians. However, the presence of foreign merchants is limited both in number and influence
- Some of them sell their produce to other markets as retailers depending on the market days: for instance, they go to Souk Jedid on Saturdays but prefer to move to Malabal market on Mondays when the market gets busier there

### Inclusion of vulnerable groups

- Women working on the market almost exclusively selling vegetables, groundnut paste and charcoal
- Women reported that they would like to sell other products such as sugar and rice, or to provide catering services
- There is no reported IDP population in Nyamlell

### Access to finance and costs

- Merchants selling local produce did not invest more than SSP 100 to start up their businesses
- Merchants work at several stages of the value chain; as producers, transporters and retailers
- Merchants selling imported products need greater access to finance and are made initial investments of over SSP 4,000 to set up their businesses
- High transportation costs contribute to high overheads for merchants
- Merchants invested their own money to start up their businesses
- The few merchants that have permanent stalls are charged SSP 500 for rent. Mobile merchants are not charged



A market manager was not designated at the time of the assessment. Storage facilities, access to water and access to sanitation are non-existent

### Governance

- At the time of the assessment (October 2013), a market manager was not designated, but was scheduled to be during the following weeks
- The market manager will have authority over both markets in the city, the old market and the new market
- Some merchants were asked for documents before beginning operations on the market (business licence and passport with valid work permit) which shows there is a monitoring system in place, even though there is currently no market manager. However, the general organisation of the market proves that governance is still weak

### Facilities

- There is no storage facility on the market and no access to water and sanitation



Fishermen near Nyamlell, Northern Bahr al Ghazal state

Nyamllel market is experiencing competition and thus needs modernising and greater supply of products in order to meet customers' needs

	Strengths	Weaknesses
Access		The city is not easy to access due to poor quality of roads
General Infrastructure		Market with no demarcation and no structure. The majority of merchants does not have permanent stalls and sell their produce on the ground
Facilities		No storage capacity on the market, so most merchants store their produce at home. There is no access to water and sanitation
Supply Chain	Presence of processed food products and textiles, despite the isolation of town	The market is lacking locally grown fruits and vegetables, though they are present to some extend
Governance, Inclusion and Security	Security was reported to be satisfactory. There are no reported risks threatening merchants	No market manager was designated and stronger governance needs to be put in place to structure and to better organise the market

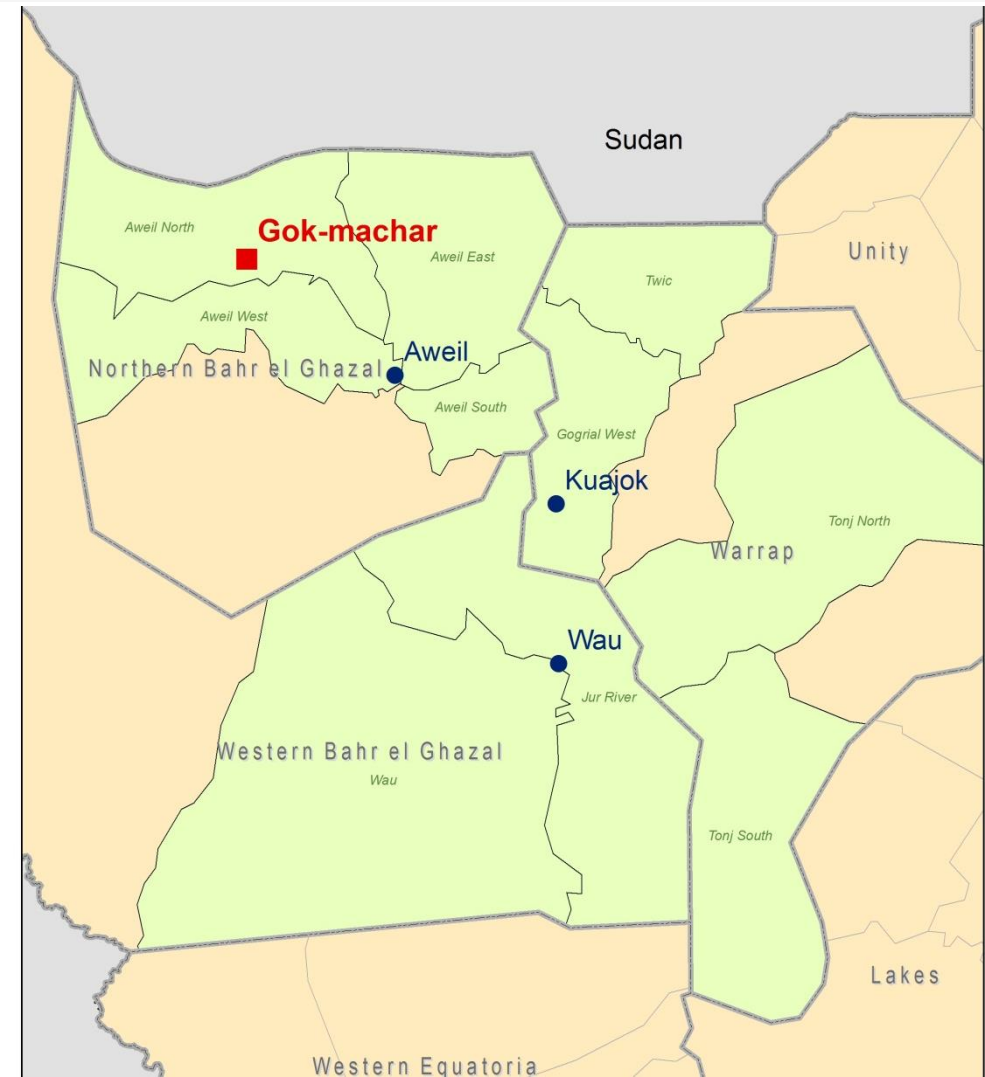
GIZ could focus on supporting local production, also creating synergies between the new and the old market. Support can also be given to equip the market

	Potential intervention	Rationale
<b>Infrastructure and Facilities</b>	Support the creation of permanently constructed stalls. Provide water and sanitation	Market in need for modernising to attract more customers
<b>Supply Chain</b>	Support local production and access to market for local produce	Need for more local agricultural produce to ensure livelihood and avoid scarcity of goods, in particular during the rainy season
<b>Governance, Inclusion and Security</b>	Encourage governance to create synergies between the two markets in town, through specialization by product categories	The market is disorganised and threatened by the new market in Nyamlell. Governance is weak as there is no acting market manager

Gok Machar is a small town that borders the Republic of Sudan. It has been affected by tensions between local communities during recent years

### Background on Gok Machar and Aweil North county

- Gok Machar is located 10km north west from Nyamlell. Access between the two locations is difficult because the river that separates does not have a bridge (although the bridge is under construction). Crossings are currently made by boat
- The city is located 20km south from the Sudanese border
- There is no reliable estimate of Gok Machar towns population, however, the total population of Aweil North county was estimated at 129,127 in 2008\*
- Gok Machar population is mainly comprised of Dinka Malual and Rizeigat. These two groups have faced recent tensions
- Gok Machar has enjoyed increasing trade and security following the demilitarisation of the disputed border region with Sudan until the closure of the border



Map of Gok Machar, Northern Bahr al Ghazal

Source: (\*) Sudan Census 2008, Central Bureau of Statistics

Gok Machar is located in the far north of Northern Bahr al Ghazal. The market is at the center of town



Satellite picture of main market in Gok Machar

GPS coordinates	
Latitude	9°8'05"N / 9.134722
Longitude	26°57'52"E / 26.964444



Gok Machar market is a large mostly retail market with around 350 merchants. A majority of merchants do not have permanent stores and sell products on the ground

### Market description

- Gok Machar is mostly a retail market
- In April 2013, there was a large fire and stalls were damaged
- The market is difficult to access. The main entry is a dirt road
- There are around 350 merchants, but only between 60-70 fully constructed stalls
- Most merchants are mobile and sell their products on the ground, or on small tables
- Stalls typically do not exceed 5 m<sup>2</sup>
- Only 5-10 wholesalers operate on the market

### Market seasonality

- The market operates during both the dry and the rainy season but is thought to be more active during the dry season, when it is more accessible
- Prices increase steeply during the rainy season, due to higher transportation costs and scarce supply

### Market activity

- Market Days: The market is open every day, but experiences higher volumes of customers on Saturdays, when people from surrounding villages come to the market
- Market Hours: 6am to 9pm

### Market clientele

- Customers from across the entire county come and visit the market

Merchant are typically male from neighbouring countries. Darfuris have large and influential presence on the market and inclusion is seldom happening

### Profile of merchants

- Merchants originate from various countries: Sudan, Uganda, Kenya, Ethiopia and Eritrea
- Sudanese from Darfur are particularly influential on the market and have access to the best stalls
- Most merchants live in Gok Machar and take less than 10-15 minutes to reach the market
- Before becoming traders, merchants were engaged in livestock rearing, teaching and security. Individuals saw the stabilization of this part of the country as an opportunity to improve income, through trading
- Most local merchants work with relatives on their stalls
- Foreigners typically employ non-relatives as shop keepers and in administrative roles

### Inclusion of vulnerable groups

- Women and youth represent less than 5% of the workforce on the market. These groups typically sell meat, local vegetables, processed and unprocessed groundnuts
- There are no IDP operating in the market

### Access to finance and costs

- Merchants need a relatively high initial investment to start a business in Gok Machar, as transportation costs are high and most products are imported
- Merchants with permanent stalls reported having invested an initial SSP 500 to set up their businesses. Other merchants invested as much as SSP 3,000
- Most merchants reported funding their businesses with their own money, earned through previous activities
- Rental costs for stalls are around SSP 150 per month for permanent or poorly-built stalls (depending on the agreement with stall owner)
- Merchants who do not have permanent stores invested less than SSP 100 to start trading. They pay no rent and often sell local produce only

Gok Machar's market manager is limited in its power although the market would need to upgrade its facilities

### Governance

- Market manager's name: Thiep Thiep Dheu
- Telephone: 0913146967
- In the position since 2008
- Appointed by his predecessor
- His role is to collect taxes, link the merchants with the local authorities and solve disputes

### Facilities

- There is no storage capacity on the market and most merchants store their produce on their stalls or at home (overnight storage)
- There is no water and sanitation on the market

Gok Machar market has a limited supply of agricultural produce. The market lacks facilities and suffer from poor access

	Strengths	Weaknesses
Access		The market is difficult to access. It can be reached via a dirt road or by boat. A bridge is still under construction
General Infrastructure		Many merchants sell their products on the ground. There is no access to water or sanitation
Facilities		There is no storage capacity in the market
Supply Chain		There is a lack of variety of products, in particular vegetables and rice
Governance, Inclusion and Security	Despite the greater influence of Darfuris on the market, there is a collaborative relationship between merchants and no problems were reported within the market community at present	<p>Market manager was designated by his predecessor (not the government or merchants), which may lead to lack of acceptance among merchants</p> <p>Low inclusion of women and youth</p>

GIZ could focus on supporting local production on this market, that is dominated by imported products

	Potential intervention	Rationale
Supply Chain	Support local production and value chains	The northern road to Sudan is currently closed, Gok Machar is very dependent on imports from locations far away (Uganda, Kenya), which contributes to high prices
	Support supply of vegetables, fruits and other food produce from other markets in the region	
Governance, Inclusion and Security	The market manager could get more power if representative of the merchants. The creation of a market committee having access to funding could help the market manager take executive decisions on promoting local produce or on the integration of women and youth for instance as well as upgrading market facilities	There are large numbers of stalls selling non-food products (clothes and accessories) and managed by Darfuri merchants. Giving space to local production will create opportunities for the community

War-awar is a village inhabited by the Dinka tribe, in the north west of Aweil

### Background on War-awar and Aweil East county

- War-awar is a small town located 35km north east of Aweil and 40km from the Sudanese border
- Most inhabitants are Dinka and Misseriya
- The Dinka and Misseriya communities have experienced decades of ethnic, religious and land based conflict
- The area is currently peaceful and the market, (called Peace market) is considered to have played a role in the peace building process by reconciling the two tribes giving them access to livelihood and sometimes even allowing them to partner on the market
- The Dinka population is primarily engaged in livestock, fishing and trading. The Misseriya population are migratory pastoralists
- The population of Aweil East was estimated at 309,921 in 2008\*
- The War-awar Peace Committee was recently established with USAID funding and aims to bring sustained stability to the town

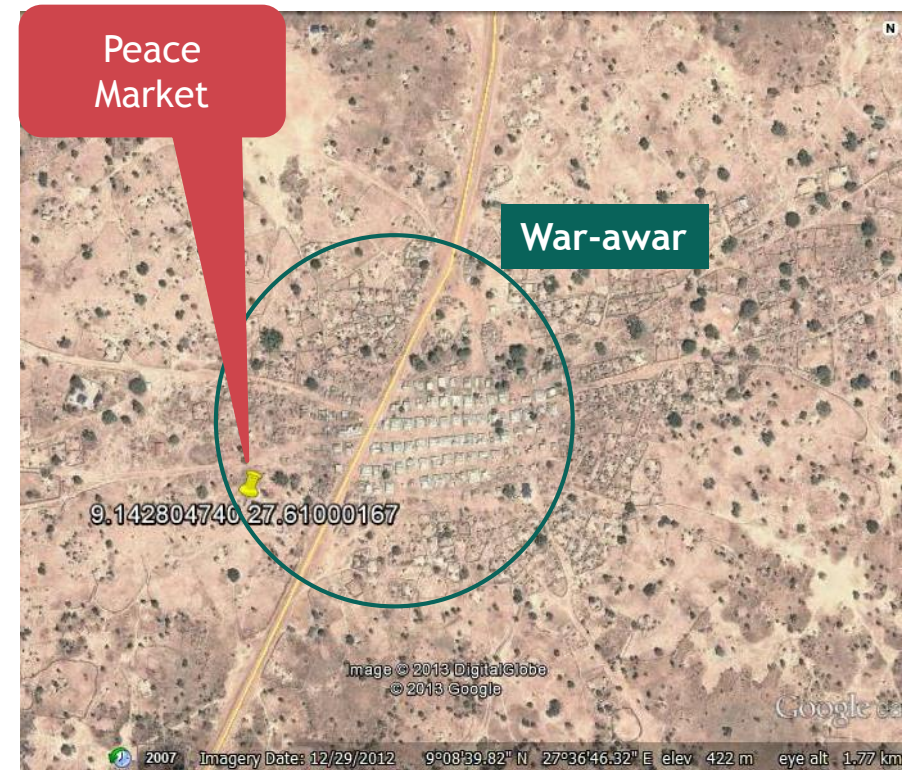


Map of War-awar, Northern Bahr al Ghazal

Source: (\*) Sudan Census 2008, Central Bureau of Statistics



War-awar is located halfway between Aweil and the Sudanese border



Satellite picture of main market in War-awar, Northern Bahr al Ghazal

### GPS coordinates

Latitude

9° 8' 34" N / 9.142804740

Longitude

27° 36' 36" E / 27.61000167

War-awar market is a large market for the size of the city and attracts people from the entire county. The market is in competition with Wanjyok market, 30 minutes away

### Market description

- War-awar market is both a wholesale and a retail market. Wholesalers account for not more than 5% of total merchants
- The market is central and easy to find. It is relatively well organised and merchants make an effort to display their products in a marketable way
- There are around 300 merchants, of which 150 have permanent, fully or poorly constructed stalls. Permanent stalls are on average 6-8 m<sup>2</sup>
- The remaining merchants sell goods on plastic sheets on the ground
- The market is in competition with Wanjyok market, which is a 30 minute drive away, on the road to Wau

### Market activity

- Market Days: The market is open every day
- The main market day is Monday
- Market Hours: 7am to 6pm

### Market seasonality

- Market is active during both seasons, but busier during the dry season
- Merchants reported that prices remain comparable during the two seasons unlike most surveyed markets

### Market clientele

- Unlike the majority of markets assessed, market customers are mainly men
- Most customers are coming from War-awar or the surrounding villages. However, the market also attracts people from the entire country

Merchant are mostly Dinkas, Misseriyas, Darfuris Sudanese, Ugandans and Eritreans. Market activities are not reported to be a source of conflict between the communities

### Profile of merchants

- The market is mainly comprised of Dinka and Misseriya merchants. Some shops are Misseriya - Dinka partnerships
- Most merchants are present in the market every day, during both the rainy and dry seasons
- Merchants who are farmers work cyclically. They typically dedicate time to cultivation and then bring the crops on the market after the harvesting period
- Foreign merchants sell primarily processed goods that are imported from Uganda and Sudan
- Eritreans are primarily catering service providers
- Misseriya and Darfuri merchants are thought to have more influence on the market than others

### Inclusion of vulnerable groups

- Women represent about 20% of the total workforce and sell vegetables, groundnuts and beauty accessories, in addition to providing catering services
- There are a few IDPs in War-awar and some of them are reported to have activity on the market, selling meat and mobile phone credit

### Access to finance and costs

- Local merchants who are both farmers and retailers face lower start-up costs and reported spending less than SSP 500 on transportation and rent on a monthly basis
- Foreign merchants benefited from a higher initial investment than local merchants. Some even reported having spent as much as SSP 15,000 to start their business
- Rent costs for merchants with permanent stalls are relatively high on War-awar market and range from SSP 500-850 per month
- Initial funding typically came from the merchants own savings, or family loans both for local and foreign merchants

Governance is strong and the market plays an important role in maintaining peace in the area.  
Equipment remains very limited

### Governance

- Market manager's name: John Dut Athian
- Telephone: 0911160604
- In the position since 1998, he has been re-elected by his peers
- His role is to solve problems between merchants, collect rents and collect market dues
- Merchants are asked for identification and business permits
- Foreign merchants are asked to present a passport and a valid work permit in order to start up operations on the market
- The main objective of the market manager is to increase inclusion of local merchants in the market as foreigners currently have a better position. The objective of the market manager is to give the market a central role in keeping the different communities in peace, encouraging partnerships

### Facilities

- There is no storage facility in the market. Most merchants store their products in their stalls or at home
- Management is willing to provide storage / cold storage facilities if given access to financing
- There is a private access to water and sanitation on the market for SSP 1

War-awar is an important market on the road to Sudan and driven by a strong governance. Supply of (imported) fruit and vegetables is high relatively to the remote position of the market

	Strengths	Weaknesses
Access		The road to War-awar is a dirt road, making the town difficult to access, especially during rainy season
General Infrastructure	The market is quite large (300 merchants) and is organised by product type. Half of the stalls are constructed in concrete material. Private access to water and sanitation is available	
Facilities		No storage capacity on the market
Supply Chain	Good supply of food produce (including vegetables, processed agricultural products, meat and oil)	Most fruits and vegetables are imported. There is an oversupply of textile products
Governance, Inclusion and security	<p>Presence of a market manager</p> <p>The market is known as Peace market as it plays an important role stabilising the city and brought together members of both the Dinka and Misseriya communities</p>	Foreigners, particularly Sudanese, are thought to be very influential on the market



GIZ could support storage facilities. Supporting local production of fruits and vegetables may also contribute to better inclusion of local merchants in the market

	Potential intervention	Rationale
Infrastructure and Facilities	Support the building of a storage capacity on the market	Storage is an issue as most merchants cannot store their products on the market and have to store them in their stalls, at home or not at all
Supply Chain	Support local production	The road to Sudan is currently closed and War-awar is therefore very dependent on imports from Uganda and smuggled goods from Sudan
Governance, Inclusion and Security	Support better inclusion of local merchants	In other locations, local farmers are also local merchants. Replicating this model here can improve access to market for the community and increase the supply of local produce to the market

Malek Alel is a largely Dinka town, south east of Aweil

### Background on Malek Alel and Aweil South county

- Malek Alel is located 20km south east of Aweil and 50km north west of Kuajok
- Malek Alel is in Aweil South county
- The population of Aweil South was estimated at 73,806 in 2008\*
- Malek Alel is largely populated by Dinka, who are primarily engaged in livestock, fishing and trading



Map of Malek Alel, Northern Bahr el Ghazal

Source: (\*) Sudan Census 2008, Central Bureau of Statistics

Malek Alel is located halfway between Kuajok and Aweil. The market is accessible via a paved road



### GPS coordinates

Latitude

8°35'54"N / 8.598206450

Longitude

27°35'28"E / 27.59102993



Satellite picture of main market in War-awar, Northern Bahr al Ghazal

Malek Alel is a medium sized market, which experiences higher activity during the dry season. It is in competition with a smaller market nearby

### Market description

- Malek Alel market is a general retail market located at the centre of town. It is easy to locate and can be accessed via a sealed road
- Only few wholesalers have been identified on the market
- Goods are brought to the market by car
- The market is relatively large, for the size of the city
- There are around 350 stalls, most of which are semi-permanent stalls constructed from poles and covered by grass
- Stalls are large, with an average size of 24m<sup>2</sup> and often shared. Products are displayed on small tables or directly on the ground
- Main products sold on the market are produce, flour, oil and sugar
- Malek Alel market is in competition with another market, Wathmok, which is located less than 30 minutes away. Wathmok sells similar products but is slightly larger in size. Merchants and customers find Wathmok more attractive during its market days

### Market activity

- Market Days: The market is open everyday but is less active on Tuesdays, Fridays and Sundays as these days are markets days for Wathmok market. Volumes decrease by as much as 70% when Wathmok market is open
- Market Hours: 8am to 7pm

### Market seasonality

- The market is open during both seasons but busier during the dry season
- Merchants reported that prices could increase by up to 70% during the rainy season due to a shortage of supply

### Market clientele

- Customers are mainly women from town or from surrounding villages. They typically have little income and shop for food items for their households

Merchants are from local areas and few women have access to stalls. The capital requirement to start an activity on the Malek Alel market is relatively low

### Profile of merchants

- Merchants are exclusively from local population and no foreigner was reported to have a stall on the market
- Merchants are typically middle aged men living within Aweil South county, in Malek Alel or in other villages further out (e.g. Hondit, Mayomlel, Nyonyacawany)
- They work alone or with one relative but, rarely employ people on their stalls
- The majority of merchants are retailers who are supplied by Sudanese wholesalers (for processed goods) or by local farmers (for agricultural produce)

### Inclusion of vulnerable groups

- Women represent no more than 10% of the total workforce on the market. They primarily sell vegetables and groundnut paste
- According to the market manager, there are no IDPs on the market
- High inclusion of youth (60% of workforce) who mainly sells clothes, sugar, milk and other processed goods

### Access to finance and costs

- Merchants with no permanent stalls pay relatively small rents. Rents range from SSP 25-100 per month
- Interviewees reported having invested between SSP 100-500 to start their businesses
- Initial investment capital came from personal savings from previous income generating activities (selling livestock for instance)

The market is poorly equipped and the market manager has limited resources available

### Governance

- Market manager's name: Acuel Wul Klul
- Telephone: 0919202116
- In the position since 2003
- Elected by merchants
- Responsible for solving problems between merchants, collecting rents and market dues
- Most merchants were asked for identification and business permits before they were permitted to start operations
- The market manager wishes to increase the supply of goods to the market, in particular for food items. He also would like to provide merchants with permanent stores, but lacks funding

### Facilities

- There is no storage capacity on the market and most merchants cover their products and pay someone to watch them overnight
- There is no access to water and sanitation



Malek Alel market has high potential, if it can overcome facility and supply chain challenges

	Strengths	Weaknesses
Access	With the paved road, access to the market is easy. The market is central to three large towns (Wau, Aweil and Kuajok)	Access and supply are limited during the rainy season
General Infrastructure	The market is relatively large compared to the size of town with 350 stalls	Most merchants do not have permanent stalls and very few have tables to display their goods on
Facilities		There is no storage facility on the market. There is no access to water and sanitation
Supply Chain	Good supply of vegetables and processed foods from neighbouring towns, from Uganda and from Sudan	There are many imported products. Local products substitute imports during rainy season
Governance, Inclusion and security	Well-organized and has an elected market manager	Low inclusion of women, who make up an estimated 10% of the workforce
	High inclusion of youth (60% of workforce) who mainly sells clothes, sugar, milk and other processed goods. Merchants are exclusively local South Sudanese. It was reported that no particular community had influence over the market	

GIZ could support storage facilities, enhance local production and inclusion of women

	Potential intervention	Rationale
Infrastructure and Facilities	Support the building of a storage facility on the market	Storage is an issue as most merchants cannot store their products on the market and have to pay for people to watch them at night. A storage facility would enable preservation of meat, fish, vegetables and other products
Supply Chain	Support local production	Malek Alel market is still very much dependent on imports from Uganda and Sudan. This has a negative impact on supply and prices during the rainy season
Governance, Inclusion and Security	Advocate for better inclusion of women in the market	Women are often involved in growing produce. The development of an efficient farming industry around Malek Alel will encourage competition with imported products, increase income and contribute to more inclusion and will create more demand for local products improving the livelihood of the community

1. Objectives
2. Methodology
3. Definitions
4. Products
5. Cross-cutting Issues
6. Findings per Market (12 markets)
- 7. Recommendations**

## 7. RECOMMENDATIONS > VALUE CHAINS WITH HIGH POTENTIAL (1)

GIZ could look in further detail at value chains with high potential in terms of production volumes, employment generation within local communities and competitiveness

Value Chain	Cultivation Requirements	Impact on Employment	Demand and Competitiveness on the Market
<b>1 Sorghum</b>	Sorghum grows during the rainy season and the climate is fit to a higher production in the region. Harvesting takes place from October to December	Employment could be generated all along the value chain: growing the sorghum (in cooperatives or big farms), transporting it to the market, transforming it into flour directly in the market or by creating small transformation units and eventually selling the flour on the market	Sorghum flour is the cheapest on the market and is praised by consumers. There is a high demand but not always enough supply. Imported flour (mainly wheat and maize) could not compete as more expensive
<b>2 Groundnut</b>	Groundnut grows in the entire surveyed region during the beginning of the rainy season and is harvested in August and in September. Production could be increased with improved access to tools and equipment	Employment could be generated all along the value chain: growing and harvesting the nuts, transforming (dehulling, grinding to make the g-nut paste or transforming into oil), packaging (for the paste and the oil) for eventually selling it on the market	There is a high consumption of groundnut under all its forms in South Sudan. Demand for paste and oil is thought to be higher than supply. The production is only local and the produce are not imported from Sudan or Uganda. Even merchants from Sudan (North) come and buy on the South Sudanese markets. The threat comes from other types of imported oil, but generally more expensive

## 7. RECOMMENDATIONS > VALUE CHAINS WITH HIGH POTENTIAL (2)

GIZ could look in further detail at value chains with high potential in terms of production volumes, employment generation within local communities and competitiveness

Value Chain	Cultivation Requirements	Impact on Employment	Demand and Competitiveness on the Market
<b>3 Vegetables</b>	Vegetables grow during the dry season and climate entitles growing great quantities of tomatoes, eggplants, pumpkin, cucumber with improved productivity of farms, with the right training and proper tools	Grouping individual farmers into cooperatives or big farms could increase the quantity of produce and thus increase the requirements for people working along the value chains (need for growing, harvesting, washing, transporting to the markets and selling them)	In secondary markets, the supply of vegetables is not sufficient while there is a high demand for produce such as tomatoes, eggplants, peppers, etc. In main markets (Aweil, Wau and Kuajok) there is a higher risk to face competition from imported products from Uganda and Sudan but price of local production could be competitive
<b>4 Maize</b>	Maize grows during dry season and is harvested in August and September. productivity could be easily improved if know-how is passed to local communities and with the use of modern production tools	Employment could be developed all across the value chain: growing and harvesting, transforming into flour, into grain or as a corncob, transporting and selling on the markets	Local maize flour can substitute the imported one if proposed cheaper (according to market managers and merchants). The biggest threat comes from imported corn cans coming from Uganda. But local communities prefer the local one since it is thought to be of higher quality and sweeter. People also consume maize as corncob

## 7. RECOMMENDATIONS > VALUE CHAINS WITH HIGH POTENTIAL (3)

GIZ could look in further detail at value chains with high potential in terms of production volumes, employment generation within local communities and competitiveness

Value Chain	Cultivation Requirements	Impact on Employment	Demand and Competitiveness on the Market
<b>5</b> <b>Rice</b>	<p>The entire surveyed region has a convenient climate and access to water to develop rice schemes but requires know-how, modern equipment (tractors) and working capital to sustain the schemes. There is a rice scheme currently in Aweil town (the Aweil Rice scheme), developed 50 years ago, but it needs modernisation and financing. The scheme is not used at its full potential</p>	<p>The entire value chain of rice is to employ number of people from the communities, to work on the scheme, to wash and dry the rice, to package it and transport it into the markets. High production of rice could create a fair amount of jobs in particular in August and in September for weeding the rice and in December for harvesting</p>	<p>There is a risk of competition as rice is a competitive product and highly imported from Uganda and Sudan. The local production is to be important enough to compete with the prices proposed by foreign products on the markets and local population is thought to prefer the local ones to the imported one (perception of high quality of local produce)</p>



## 7. RECOMMENDATIONS > SUPPLY CHAIN (1)

GI Z has an opportunity to intervene and improve the supply chain of agricultural produce, focusing on increasing local production and creating producers' associations

		Potential Intervention	Rationale	Markets
Supply Chain	↑ PRIORITY	Provide vocational training on farming techniques and basic farm management (e.g. logistics, basic accounting)	Lands are disposed to grow different seeds but there is a cultural and a know-how obstacle to farming more diversified fruits and vegetables. Most local merchants are less trained on how to run a trading business than foreigners	All regions
		Develop producers' associations e.g., <i>Warrap Women's Agricultural Association</i>	Producers are not specialized and do not have optimal market power operating as individuals, so grouping them together could increase production and margins	All regions
		Encourage development of private transporter circuit to support producers' associations	Individuals spend a large amount of time and money transporting very small amounts of produce; economies of scale with one transporter visiting many farms/producers' associations	Secondary markets

## 7. RECOMMENDATIONS > SUPPLY CHAIN (2)

GI Z has an opportunity to intervene and improve the supply chain of agricultural produce, focusing on increasing local production and creating producers' associations

		Potential Intervention	Rationale	Markets
Supply Chain	↑ PRIORITY	Increase the local production of agricultural produce with priority to value chains with high potential	Most markets are heavily dependent on imports and no substitution sources are available. Food security is threatened in particular during rainy season	All regions
		Develop efficiency of local fishing activities and encourage the implementation of fresh fish stalls	Most market towns visited have ready access to a river and fishing and fish retailing activities could be substantially developed as there are very few fish stalls	Wau, Tonj, Wunrock, Kuajok, Gok machar, Nyamlell, War-awar
		Poultry value chain interventions (chick hatching, egg boxes, poultry meat trading)	Low consumption of eggs and poultry products, poor packaging materials for eggs means they are traded in low volumes on the markets	All markets

- Note: value-chain specific recommendations need to be further substantiated and developed with a value-chain study

## 7. RECOMMENDATIONS > MARKET UPGRADING

GIZ has an opportunity to develop markets and improve food security by promoting linkages between regional and *payam*-level markets to improve supply consistency and diversity

Market Upgrading	PRIORITY	Potential Intervention	Rationale	Markets
		Create synergies between regional and <i>payam</i> -level markets for better supply of fruits and vegetables	<i>Payam</i> -level markets are poorly supplied with agricultural produce and have very low product diversity. Wholesalers could create supply links with smaller markets to meet demand and improve food security	All markets
		Improve access to finance or micro-loans to local merchants and women	Finance is a major obstacle for most local merchants to get an access to stalls and to imported products in the market	All markets
		Create links between livestock markets and general markets	Livestock are in great supply in the northern region, although meat stalls are scarce. Improving the meat supply chain might fill a gap between stock-raisers and the merchants, and better integrate Dinka tribes into economic activities	All markets
		Organise markets by product categories	Small markets are disorganised and merchants do not benefit from competition as no visibility is given to consumers	Tonj, Warrap, Wunrock, Malek Alel, War-awar, Gok Machar, Nyin Akok

## 7. RECOMMENDATIONS > PROCESSING AND MARKETING

GIZ has an opportunity to increase the value-added in markets by giving loans or grants for small processing equipment, for instance hand-powered shea and peanut oil expeller

Processing and Marketing	PRIORITY	Potential Intervention	Rationale	Markets
		Small loans/grants to producers' associations for processing equipment	Merchants cannot get the benefits from retailing higher value products because of lack of access to processing equipment, e.g. mincing machine, groundnut pasting machine, oil expeller	All markets
		Small loans/grants to producers' associations for supporting equipment	Some current transformations do not add as much value as they could, e.g. fish drying, which could be done in a dedicated drying/smoking house producing hygienic and packaged products for regional trade	All markets

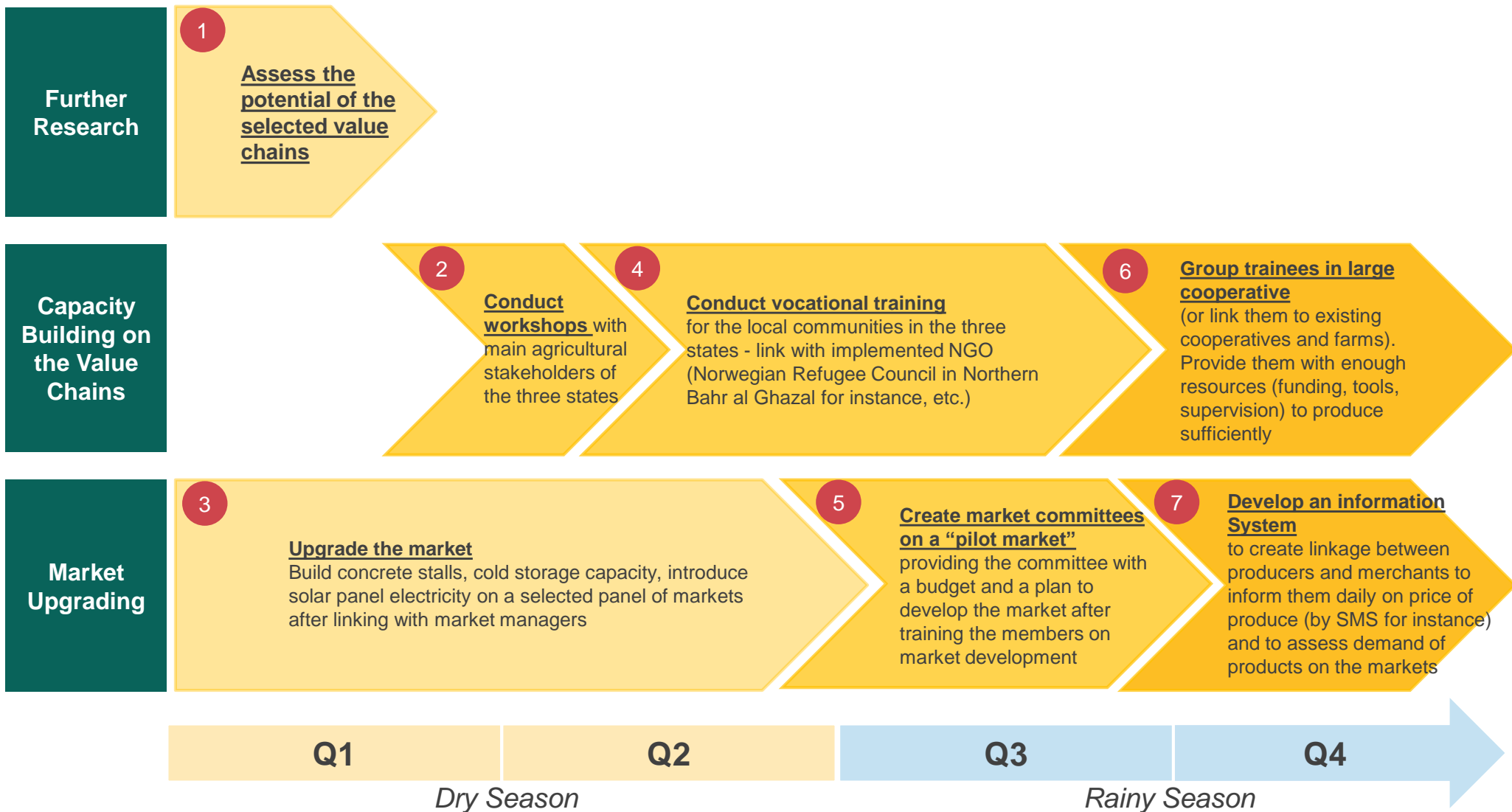
## 7. RECOMMENDATIONS > GOVERNANCE, SECURITY AND INCLUSION

GIZ has an opportunity to grow the volume of trade by better organising the markets, building management capacity, merchant awareness, and providing market information

		Potential Intervention	Rationale	Markets
Governance, Security and Inclusion	↑ PRIORITY	Market managers' capacity development program	Market managers are not entitled to govern and develop their markets. A market committee could be created to be in charge of market improvement plans, handling small grants and understanding merchants' needs	All markets
		Market Information System/SMS notification system	Merchants may get poor prices from more powerful wholesalers. A program that sends SMSs to merchants on a daily basis giving prices of main products in regional markets could help merchants get better deals	All markets
		'Train the Trader'	Many merchants do not have vision or understanding of the potential to grow their businesses. Program could focus on understanding how to add value, how to increase trade volumes, and on the benefits of joining associations, etc.	All markets

## 7. RECOMMENDATIONS > ACTION PLAN

The action plan would start with further analysis on the shortlisted value chains then be articulated around capacity building on agricultural know-how and upgrading the markets with better stalls, improved facilities and information systems





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