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Essential Commodities Prices, Availability, and Market Actors' Perceptions

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Background and Approach

Sudan's market systems continue to face severe disruptions due to ongoing conflict, political instability, and economic disruptions. These challenges have led to volatile prices, limited availability of essential commodities, and rising food and fuel costs, especially in conflict-affected areas. Insecurity, infrastructure damage, and transport disruptions further exacerbate price disparities, making key goods increasingly unaffordable for vulnerable populations.

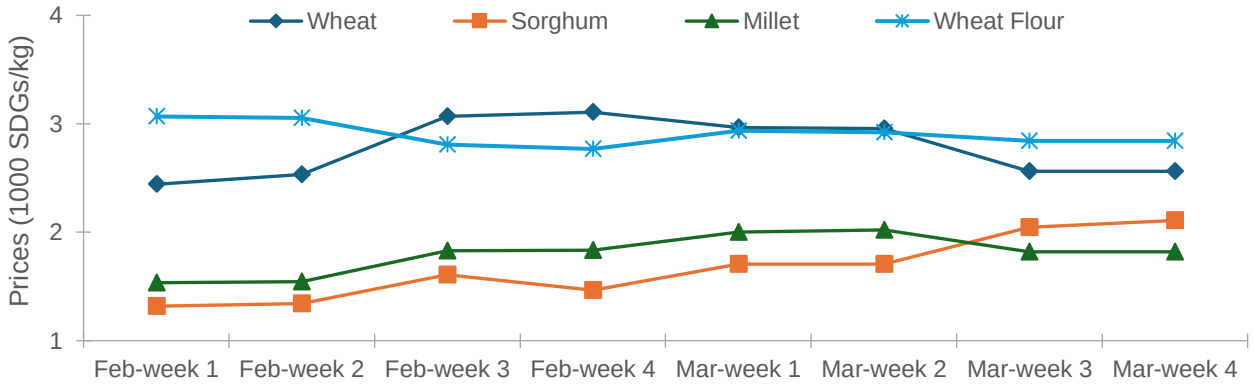
To monitor these dynamics, the International Food Policy Research Institute (IFPRI) is implementing a nationwide market monitoring initiative covering 36 markets, two in each of Sudan's 18 states. The initiative tracks prices, availability, and quality of essential commodities, monitors exchange rate movements, and gathers qualitative insights from market actors. Each month, data is collected in two rounds: the first during the first two weeks, and the second during the last two weeks. In each round, five merchants per market are interviewed using structured questionnaires and semi-structured interviews. This fortnightly approach enables timely and consistent tracking of market trends.

Merchants also assess commodity availability (high, medium, low, or scarce) and quality (good, moderate, or low). This report presents findings from February–March 2025, providing an overview of current market conditions across Sudan.[1]

Cereals and Flour

- Wheat prices rose in February but declined through March, reflecting improved availability, as corroborated by market actors (Figure 3).
- Sorghum prices steadily increased over the two months, with slight fluctuations—driven by rising demand and restricted market access in conflict-affected areas. The sharpest increases in March were seen in White Nile, Blue Nile, and Central Darfur.
- Millet prices gradually rose in February and stabilized in March, with notable declines in River Nile, Gedaref, Kassala, and Red Sea states (Figure 2).
- Wheat flour prices dipped slightly in early February but remained high and stable, reflecting dependence on disrupted milling and import supply chains.

Figure 1: Prices of cereals and wheat flour, weekly average, 1000 SDG/Kg, February - March 2025



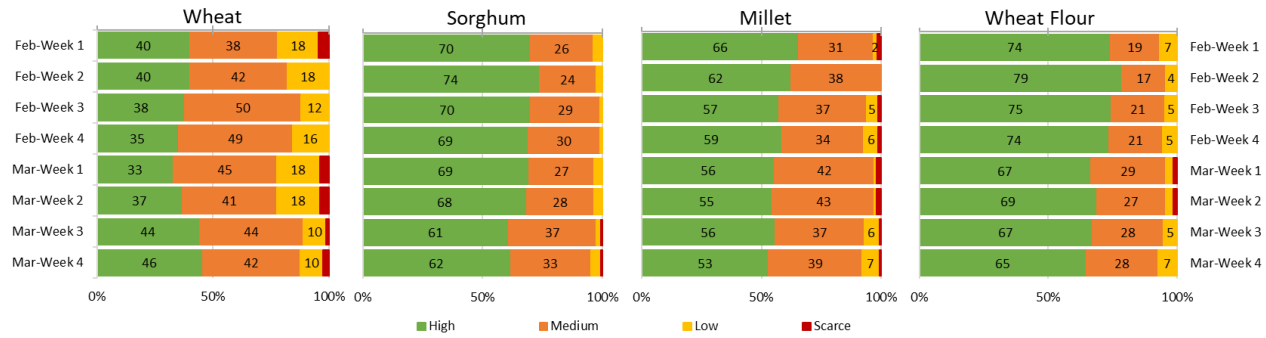
The heatmap (Figure 2) shows considerable variation in prices of wheat, sorghum, millet, and wheat flour across Sudan's 18 states. Wheat and wheat flour exhibit the highest degree of spatial disparity, with prices significantly elevated in conflict-affected states such as Central, North, and West Darfur, and South Kordofan, where market access is restricted, and supply chains are disrupted. In contrast, sorghum prices display relatively narrower inter-state ranges but remain elevated in White Nile in March. Millet prices were relatively high in Khartoum, Central Darfur, and South Kordofan states, likely due market access and transportation costs. The widening gap in cereal prices between relatively stable states (e.g., Kassala, Gedaref, and River Nile) and high-conflict zones underscores deepening market fragmentation, driven by logistical bottlenecks, informal checkpoint fees, and regional variations in food access.

[1] The weblink to the data used in this and upcoming monthly reports will be made available online in the future.

Figure 2: Local prices of cereals across states, SDG/Kg, February-March 2025

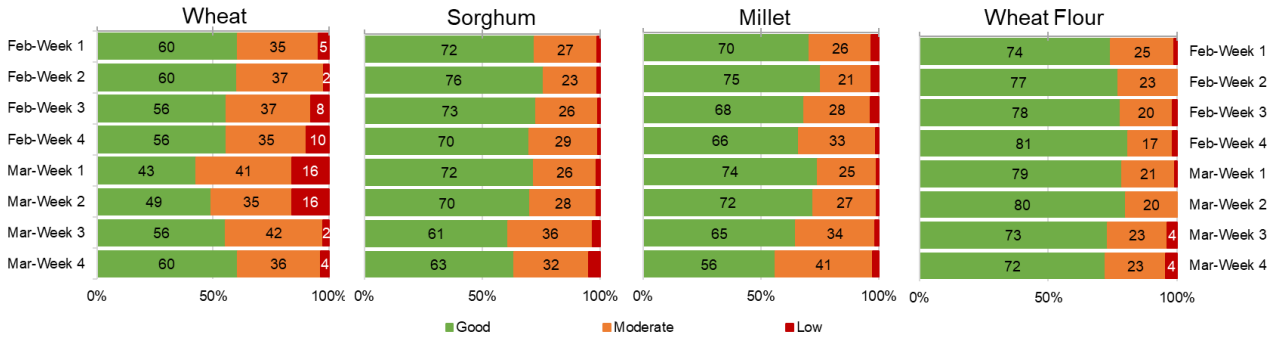
Across February and March, most merchants reported either high or medium availability of cereals and wheat flour (Figure 3). Sorghum and wheat flour consistently had the highest availability, though sorghum declined modestly in March. Millet availability declined noticeably to 53% by late March after 66% of actors reported it was highly available in early February. Wheat remained the least available cereal in February, though its availability improved slightly in late March, with 46% of merchants reporting it highly available. Sorghum maintained more consistent availability across markets, while wheat was relatively limited and volatile, reflecting its greater dependence on longer supply chains, conflict affected trade, and infrastructural barriers.

Figure 3: Cereals and wheat flour availability scores, February – March 2025



Cereal and wheat flour quality was perceived as moderate to good throughout the two months (Figure 4). However, reports of the low-quality wheat rose in the first two weeks of March but improved by the end of the month. Sorghum quality remained relatively stable, though the share of “good quality" declined slightly compared to February. The quality of millet deteriorated notably, with the share of merchants reporting good quality falling from 74% in week 1 to 56% in week 4 of March, and reports of low quality increased from 1% in week 1 to 5% in week 4. These trends may reflect storage problems and handling conditions for local cereals. Wheat flour remained high and stable, with over 70% of actors consistently reporting good quality during March, and only 4% or fewer reported low quality.

Figure 4: Cereal and wheat flour quality scores, February - March 2025



Vegetables

- Tomato prices declined steadily from early February through March, consistent with seasonal abundance and high availability in most markets.
- Potato prices were volatile, rising sharply in Week 3 of February (peaking above 5,000 SDG/kg), then declining before partially rebounding in March.
- Throughout the period, potatoes remained the most expensive vegetable, with a consistent margin of around SDG 2,000 above tomatoes and onions.
- Onion prices increased until Week 3 of February (peaking just above 2,000 SDG/kg), followed by a consistent decline through March.

Figure 5: Local prices of vegetables, weekly average, 1000 SDG/Kg, February - March 2025

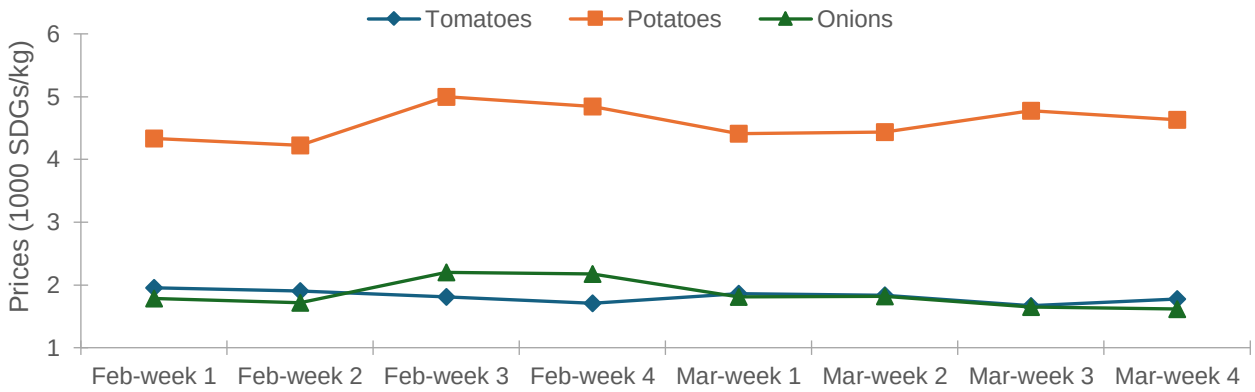


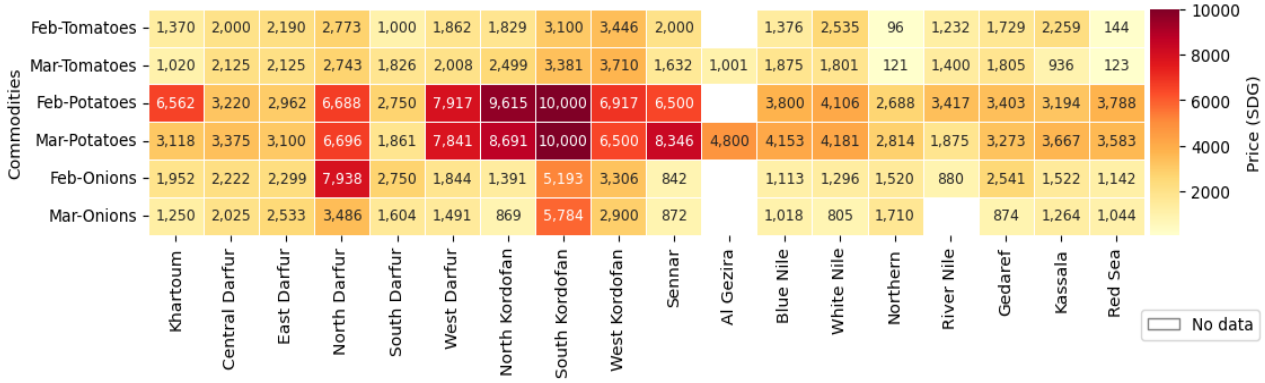
Figure 6 illustrates significant regional variation in vegetable prices across Sudan, influenced by conflict intensity, transport disruptions, and local production.

Potatoes exhibited the widest price disparities, ranging from below SDG 3,000 to over SDG 10,000 per kg. Highest prices were observed in South and North Kordofan, North and West Darfur, Khartoum, and Sennar, areas affected by trade disruptions and blocked routes. Lower prices prevailed in Northern, Kassala, and River Nile states, which are key production zones with better market access.

Tomato prices were more uniform, though slightly elevated in South and West Kordofan due to transport bottlenecks from producing areas.

Onions remained relatively stable across most states. Spikes were seen in February in North Darfur and South Kordofan, followed by widespread declines in March, except in South Kordofan and Northern states, likely due to new supply inflows. Onion prices were lowest in eastern and northern production states (e.g., Kassala, River Nile) and in relatively stable areas such as Khartoum, Sennar, White Nile, and North Kordofan.

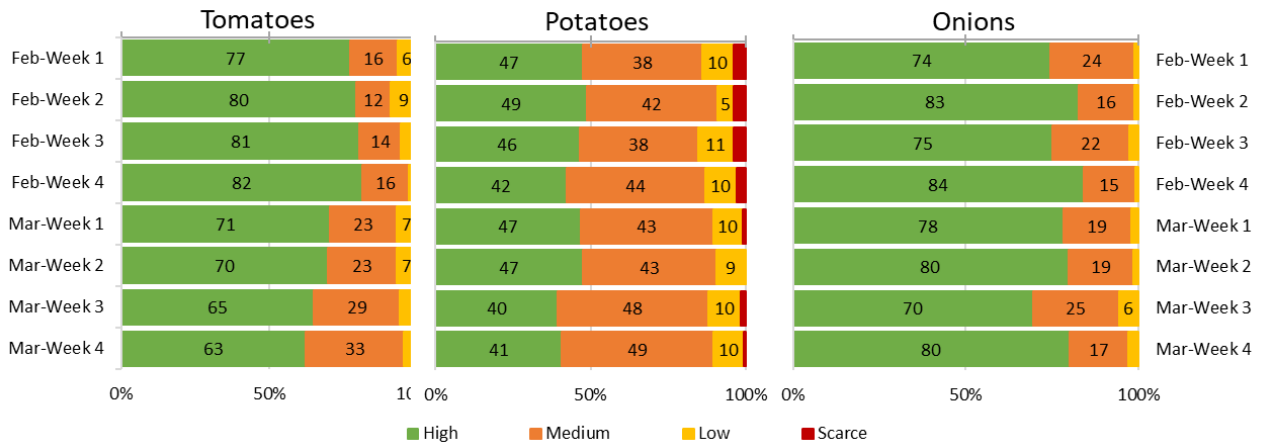
Figure 6: Local prices of vegetables across states, SDG/Kg, February – March 2025



Availability trends varied across vegetables (Figure 7). While over two-thirds of merchants reported that onions were highly available during February and March, the share of those reporting high availability of tomatoes declined steadily, falling below 63% by the end of March.

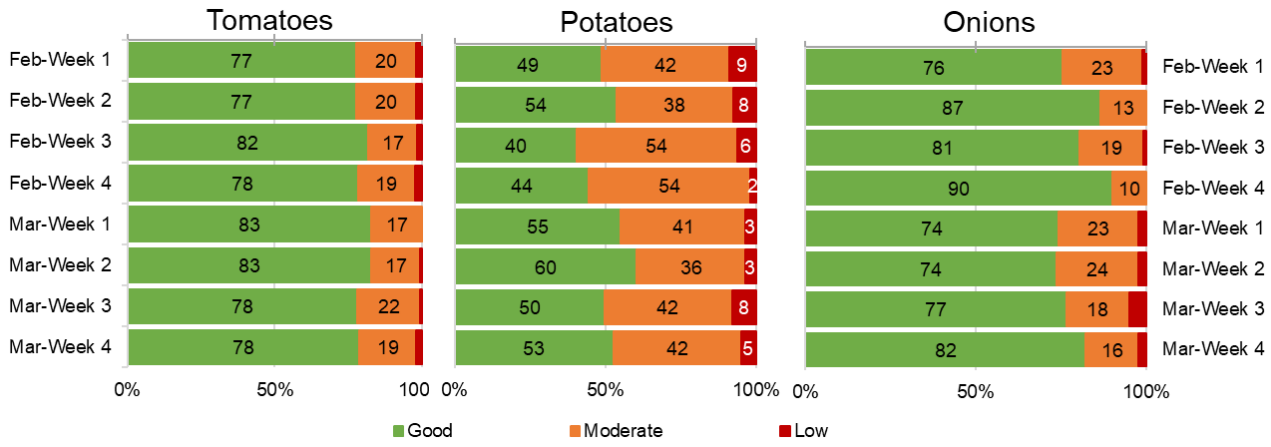
In contrast, potato availability remained limited, with less than half of merchants perceiving it to be highly available, and a growing share reporting low or scarce availability.

Figure 7: Vegetables availability scores, February - March 2025



The quality of onions and tomatoes remained stable and high, averaging above 75% during March (Figure 8). In contrast, potato quality fluctuated during February and March, with the proportion of merchants reporting good quality between 50% and 60% (Figure 8). This suggests that while tomatoes and onions quality was consistently perceived as good, concerns persist over after-harvest handling, storage conditions, transportation circumstances for potatoes.

Figure 8: Vegetables quality scores, February – March 2025



Meat and Animal Products

- Lamb meat prices rose steadily from SDG 17,500 in early February to SDG 20,000 by late March, likely driven by limited supply from conflict-affected pastoral areas and increased livestock transport costs.
- Beef prices remained stable around SDG 12,300 in February, then rose gradually to SDG 13,900 in March, consistent with reported declines in availability by market actors (see Figure 11).
- Chicken prices were volatile, dropping sharply in late February before a modest rebound in March.
- Fish prices declined through February, bottomed out in early March, and then saw a slight rebound.
- Milk and egg prices (plotted on a secondary axis) remained relatively stable, with milk slightly declining by March while egg prices rose marginally.

Figure 9: Local prices in 1000 SDGs of meat and animal products, weekly average, February - March 2025

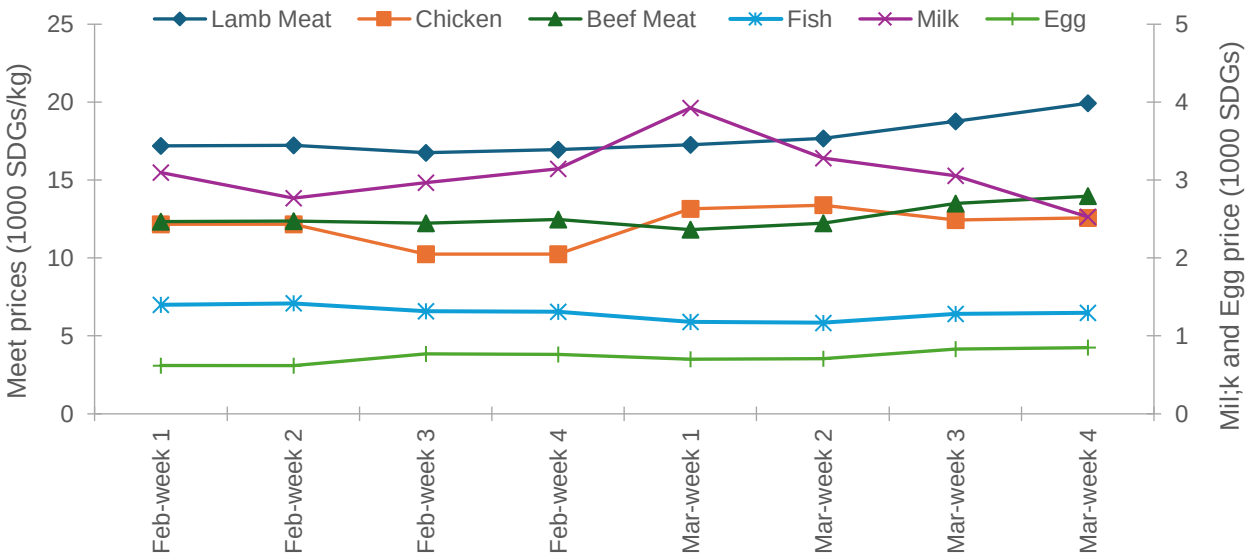


Figure 10 presents heatmaps of meat and animal product prices across Sudan's 18 states, revealing stark spatial disparities driven by conflict-related supply chain disruptions, transport access, and varying degrees of market integration.

Lamb meat prices peaked in Red Sea, Kassala, and River Nile states, exceeding SDG 29,000 in Red Sea in March, due to increased urban demand and high transport costs from pastoral regions.

Prices remained lower in Darfur and Kordofan, where local supply is more accessible and demand is generally weaker.

Chicken prices showed wide variation. Extremely low prices (under SDG 5,000) were recorded in February in Sennar and West Kordofan, likely due to local production and subdued demand. In contrast, prices exceeded SDG 13,000 in River Nile, White Nile, Blue Nile, Al Gezira, and eastern states, reflecting elevated input and transport costs.

Beef prices mirrored this trend, ranging from SDG 6,000 in East and West Darfur and West Kordofan—areas with continued local cattle rearing—to over SDG 23,000 in Red Sea, where supply is limited and costs are higher.

Fish prices were the most volatile, reflecting differences in access to freshwater sources and cold storage. Prices spiked in River Nile (SDG 24,000) and Red Sea (SDG 17,000), driven by demand and electricity disruptions affecting cold chains. In contrast, prices remained low in North and South Darfur (SDG 1,800 and SDG 3,875, respectively), where access is limited but demand is subdued.

Milk and egg prices remained relatively stable across states, though milk was notably expensive in North and West Darfur (over SDG 7,000–8,000), indicating scarcity and high distribution costs. Egg prices were low nationwide, with minor fluctuations.

Figure 10: Local prices of meat and animal products across states (SDGs), February - March 2025

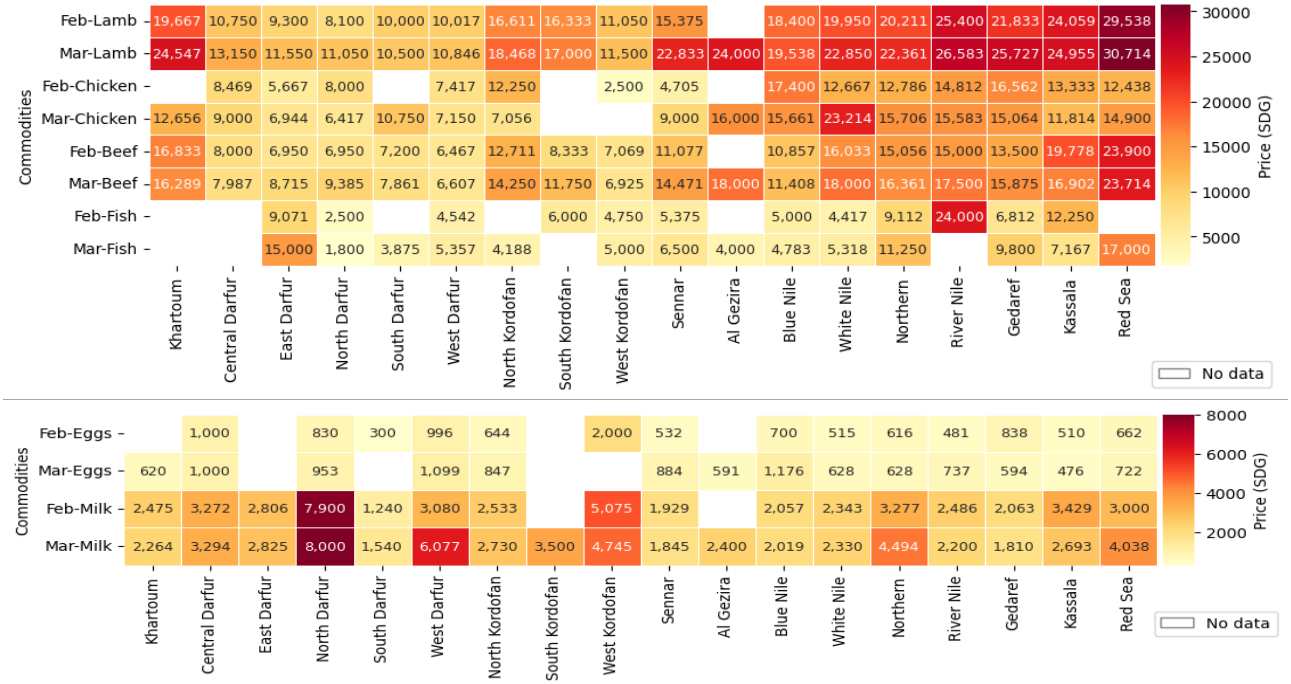


Figure 11 presents merchants' perceptions of the availability of meat and animal products over February and March 2025. Beef and lamb meat were consistently reported as widely available, with the majority of merchants rating availability as high across most weeks.

In contrast, the availability of chicken, fish, and eggs declined modestly in March. While most merchants still rated them as medium to high, there was a noticeable rise in reports of low or even scarce availability, particularly for chicken and eggs in mid- to late March. Milk availability remained relatively stable, with a slight improvement in the second half of March.

Figure 11: Meat and animal products availability scores, February - March 2025

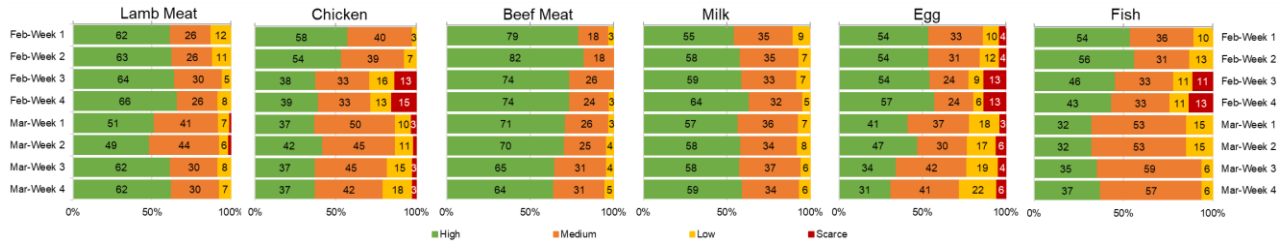
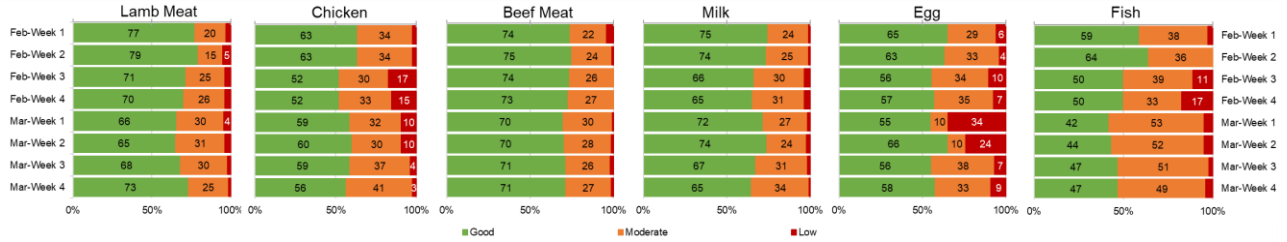


Figure 12 shows merchants' assessments of the quality of meat and animal products during February and March 2025. Most products, including lamb, beef, chicken, and milk, were consistently rated as good quality, with minimal variation over the two months. Milk quality remained strong in March, with over two-thirds of merchants reporting good quality.

In contrast, the perceived quality of fish and eggs declined in March, with a growing share of merchants rating them as moderate or low quality, likely reflecting concerns over freshness, inadequate storage, and handling issues, particularly in areas affected by power cuts or transport delays.

Figure 12: Meat and animal products quality scores, February - March 2025



Oilseeds, Cooking Oils, Sugar and Fava Beans

- Fava bean prices declined steadily, reflecting seasonal supply inflows and moderate demand.
- Cooking oil and sugar prices were relatively stable, with slight increases in late March likely driven by rising fuel and transport costs.
- Sesame and groundnut prices fluctuated slightly but remained within a narrow range, indicating stable supply and demand.
- Sunflower prices were highly volatile, dropping sharply in late February, spiking in early March, then falling again, likely due to localized supply disruptions amid market uncertainty.

Figure 13: Local prices (1000 SDGs) of oilseed (Kg), cooking oils (Liter), sugar (Kg) and fava beans (Kg), February - March 2025

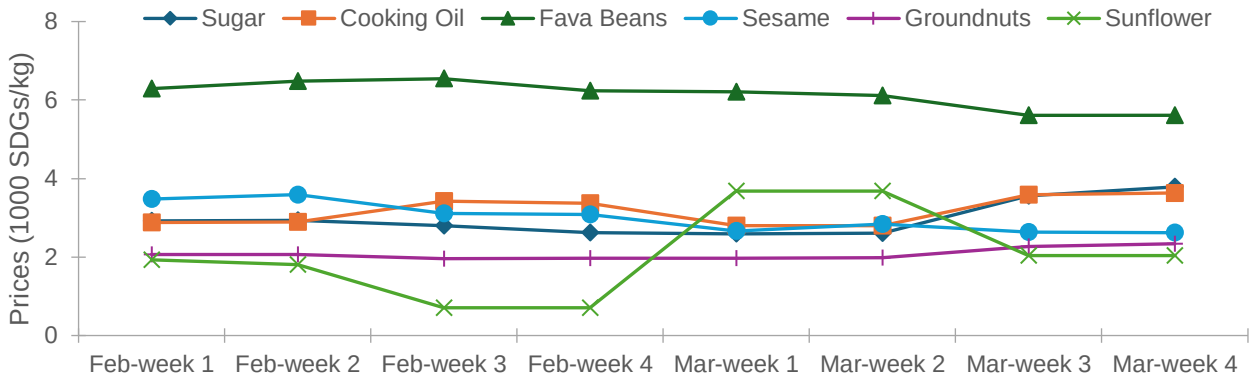


Figure 14 illustrates merchant-reported availability levels for key staples across Sudan during February and March 2025. Sugar and cooking oil were consistently reported as highly available, with about two-thirds of merchants rating availability as high throughout March. Fava beans saw a decline in perceived availability in March, with a shift from high to medium and low, suggesting tightening supply.

Among oilseeds, groundnuts maintained relatively stable availability, while sesame and sunflower showed greater volatility. Reports of medium and low availability for these two oilseeds increased notably in several weeks, reflecting local supply inconsistencies or distribution challenges.

Figure 14: Oilseeds, cooking oils, sugar and fava beans availability scores, February – March 2025

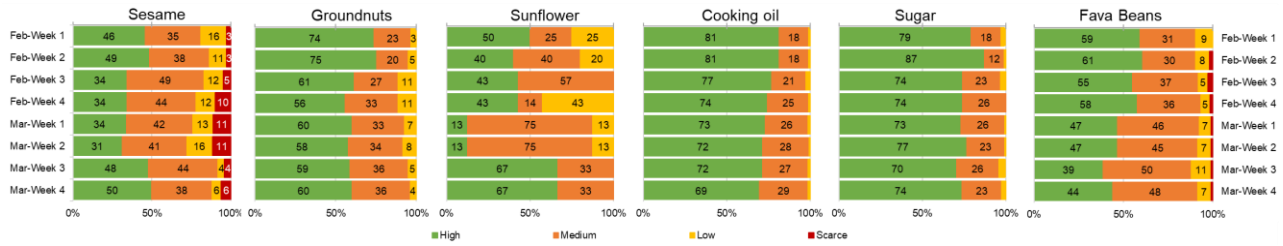


Figure 15 displays merchants' perceptions of product quality across key staples over February and March 2025. Sugar and cooking oil maintained consistently high-quality ratings, with over two-thirds of merchants reporting them as good throughout March.

Fava beans saw a slight improvement in perceived quality in late March, with a growing share of merchants rating them as good. Among oilseeds, groundnuts and sesame showed moderate fluctuations in quality perceptions, with sesame receiving more moderate and low ratings in some weeks. Sunflower quality improved markedly during March, culminating in 100% of merchants reporting good quality in the last two weeks, indicating improved post-harvest handling or more stable sourcing.

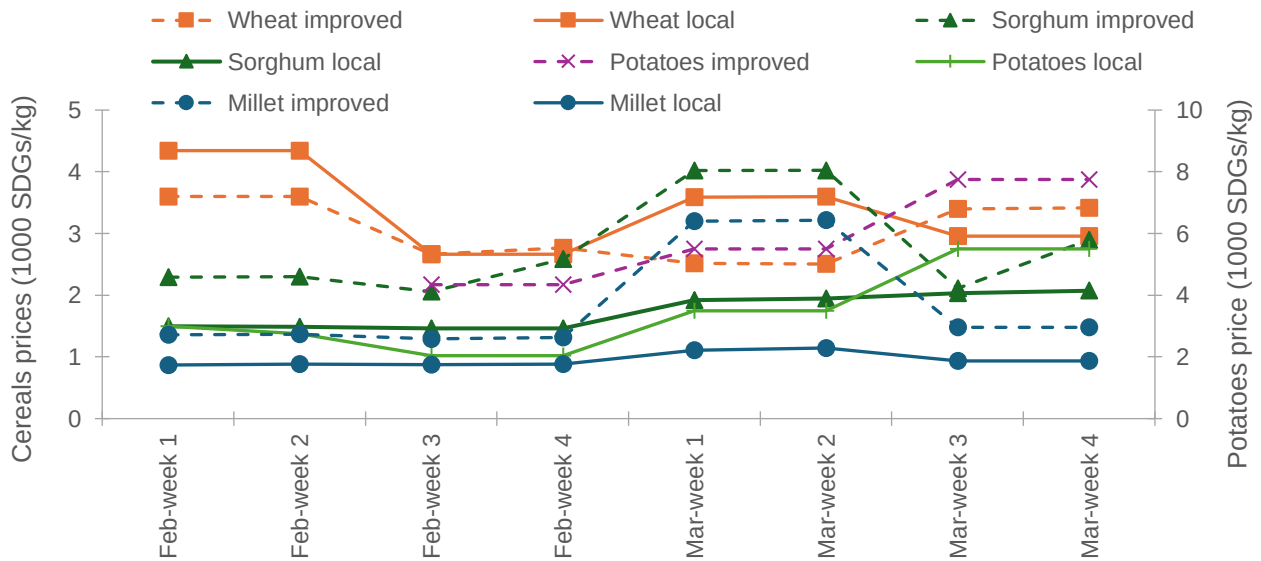
Figure 15: Oilseeds, cooking oils, sugar and fava beans quality scores, February - March 2025

Improved and Local Seeds

Figure 16 shows weekly price trends for local and improved seed varieties of wheat, sorghum, millet, and potatoes:

- Improved potato seed prices spiked sharply in late February and again in late March, exceeding SDG 7,500, likely reflecting supply shortages or peak planting demand.
- Improved wheat seed prices remained relatively stable, fluctuating between SDG 2,500 and SDG 3,500.
- Improved sorghum seed prices rose modestly toward the end of February, then declined in mid-March.
- Local seed varieties remained more stable and were priced lower than their improved counterparts:
  - Local potatoes saw a moderate price increase in March.
  - Local millet prices stayed flat, reflecting steady supply and low demand, as its planting season typically begins in June or July.
  - Local wheat prices dipped slightly in mid-February, then rose and stabilized in March.

Figure 16: Prices of seeds (1000 SDG/Kg), February - March 2025



Fertilizers

Figure 17 tracks weekly price trends for two key fertilizers (Urea and DAP) during February and March 2025:

- Urea prices rose steadily through February and early March, peaking in mid-March, before dropping sharply in Week 3 and stabilizing thereafter.
- DAP prices were stable around SDG 3,000–4,000 until Week 2 of March, when prices doubled to over SDG 7,000, remaining at that level through the end of the month.
- The sharp spike in DAP suggests a possible supply shock or seasonal demand surge, linked to planting cycles or market disruptions.

Figure 17: Fertilizer prices (100 SDG/Kg), February - March 2025

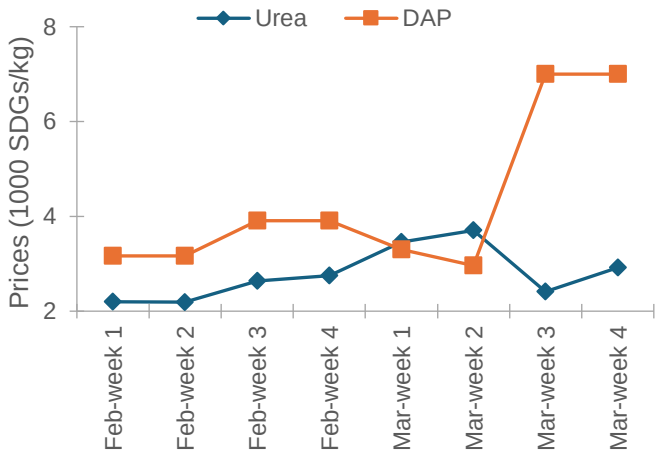


Figure 18 shows a clear decline in fertilizer availability across Sudanese markets during March 2025, indicating emerging supply constraints. For Urea, the share of merchants reporting high availability dropped steadily, from 47% in early February to just 21% by the end of March. Meanwhile, medium availability increased to nearly 80% by late March.

A similar pattern is observed for DAP, where over 70% of merchants in March reported medium availability, and less than one-third reported high availability. Scarcity was also reported in early March. These trends suggest growing conflict-related disruptions in fertilizer supply chains, potentially impacting upcoming planting seasons.

Figure 17: Fertilizer and availability scores, February - March 2025

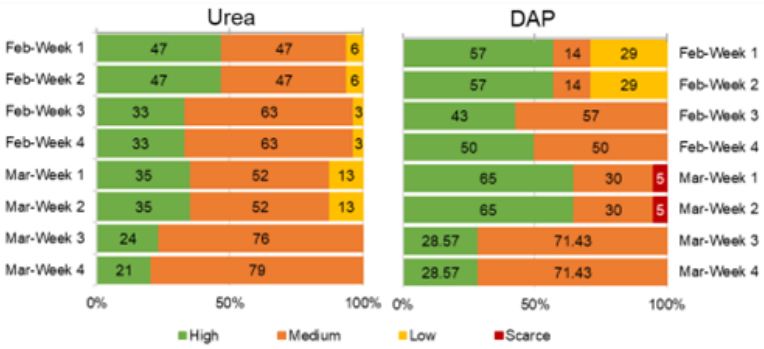
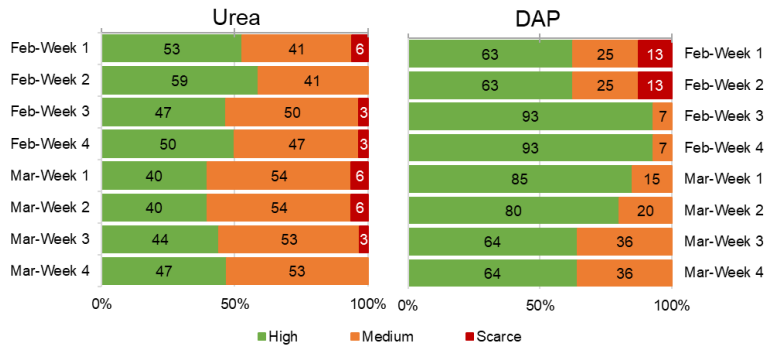


Figure 19 highlights merchant perceptions of fertilizer quality for urea and DAP during February and March 2025. DAP quality remained consistently high through late February, with over 90% of merchants reporting good quality in Weeks 3 and 4. However, quality perceptions declined gradually in March, with only 64% of merchants reporting good quality by the end of the month and a growing share rating it as moderate.

Urea quality was consistently lower than DAP across the reporting period. In March, the share of merchants reporting good quality fell below 50%, while moderate quality ratings dominated—reaching over 50% in all four weeks.

Figure 18: Fertilizer and quality scores, February - March 2025



Diesel and Petrol

Figure 20 illustrates fuel price trends for diesel and petrol in both regular and parallel markets:

- Diesel prices in the parallel market remained consistently higher than in the regular market throughout the period.
- Petrol prices were significantly higher in the parallel market during February but dropped sharply in early March, temporarily aligning with regular prices before rising again in the final week.
- Overall, parallel market prices for both fuels remained elevated due to supply constraints, high demand, and informal market dynamics.

Figure 20: Local fuel prices, 1000 SDGs/Liter, February - March 2025

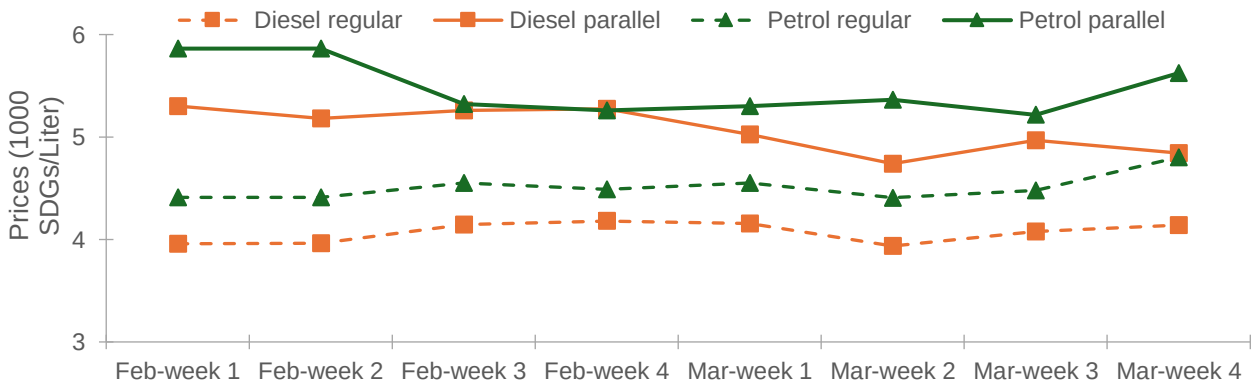


Figure 21 highlights stark regional disparities in fuel prices across Sudan, with the parallel market consistently pricing higher than the official (regular) market for both diesel and petrol. The highest fuel prices were observed in South Darfur and South Kordofan, where conflict-related disruptions and reliance on black-market channels pushed diesel and petrol prices above SDG 9,000–13,000 per liter in some weeks.

In contrast, eastern states (Kassala, Gedaref, Red Sea) and more stable regions like Al Gezira, White Nile, and River Nile recorded lower and more stable prices, particularly in the regular market. These patterns reflect the impact of insecurity and logistics bottlenecks in conflict zones versus better supply access in relatively secure areas.

Figure 21: Fuel prices across states, SDGs/Liter, February - March 2025

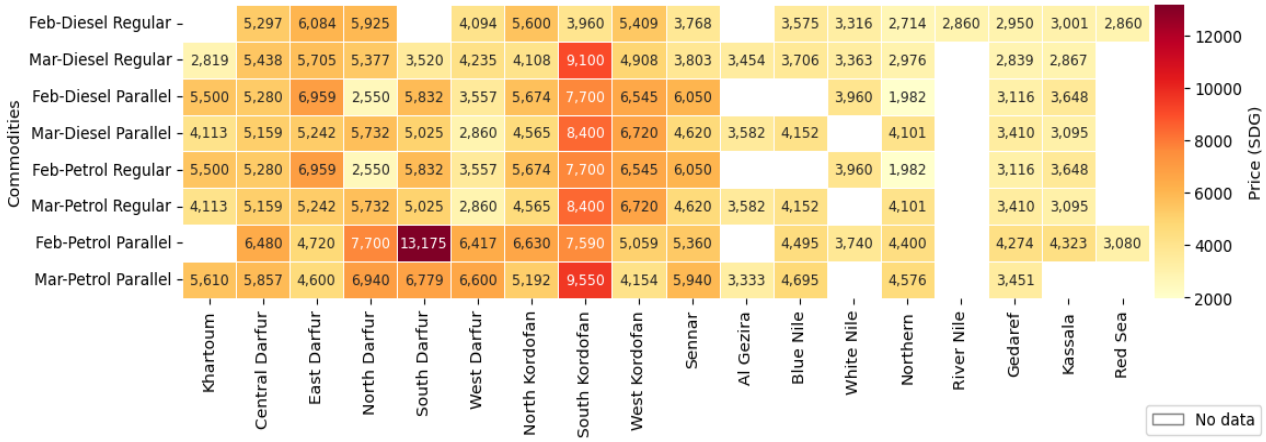
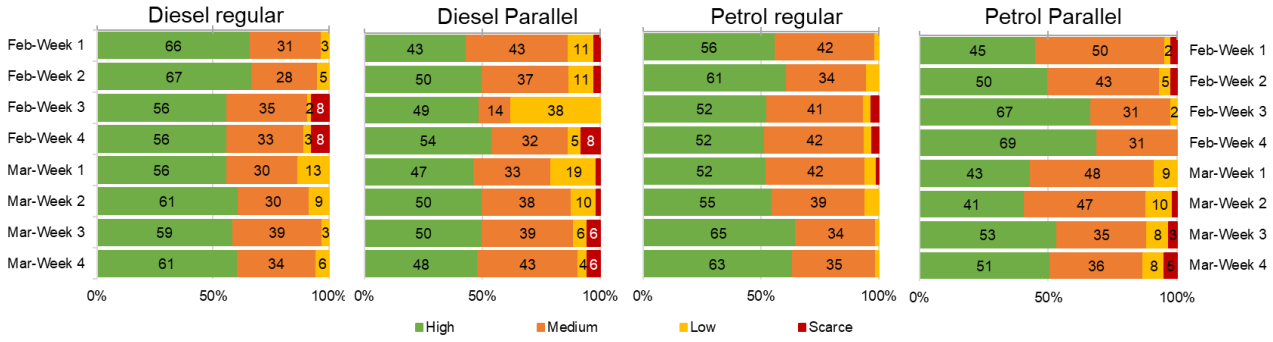


Figure 22 illustrates weekly fuel availability as reported by merchants across regular and parallel markets. Diesel (regular market) showed relatively stable supply, with over 50% of merchants consistently reporting high availability throughout February and March. Diesel (parallel market) had more variable availability, with fewer than half of merchants reporting high availability in most weeks and a notable share citing medium to low availability.

Petrol (regular market) availability fluctuated moderately, ranging from 52% to 65% of merchants reporting high availability, reflecting intermittent supply disruptions. Petrol (parallel market) remained less consistently available, with fluctuating availability levels and a persistent reliance on informal channels in some areas, contributing to moderate levels of reported scarcity.

Figure 22: Fuel availability scores, February - March 2025



Exchange Rates

Figure 23 illustrates trends in Sudan's official and parallel exchange rates:

- The official exchange rate rose gradually from early February to mid-March before slightly declining in the final two weeks.
- The parallel market rate remained consistently higher, underscoring persistent segmentation in the foreign exchange market.
- By late March, the gap between the two rates reached approximately 300 SDG (around 13.6%), reflecting limited access to official forex channels and ongoing reliance on informal markets.

Figure 23: Exchange Rate, 1000 SDG/USD, February - March 2025

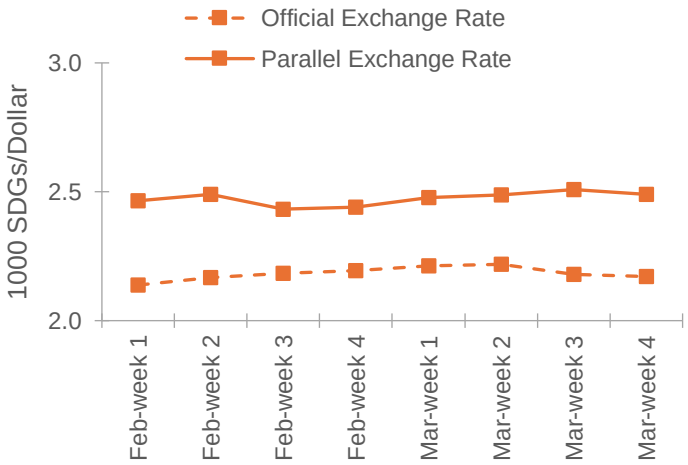


Figure 24 highlights significant regional disparities in official and parallel exchange rates across Sudan. In every state, the parallel exchange rate exceeded the official rate, with the widest gaps recorded in Khartoum, Darfur states, and West Kordofan. By March, the parallel rate in these areas surpassed SDG 2,600/USD, while official rates remained as low as SDG 2,050–2,300/USD.

In contrast, northern and eastern states (e.g., Northern, River Nile, Kassala) exhibited smaller differentials, likely due to better access to formal banking systems and safer trade corridors. These patterns reflect localized financial fragmentation, conflict-related disruptions, and the prevalence of informal exchange channels.

Figure 24: Units of SDGs to one US dollar exchange rates across states, February - March 2025

Market Actors' Perceptions Amid Conflict (Feb–Mar 2025)

Since the outbreak of the RSF–SAF conflict, markets across Sudan have faced severe disruptions. Traders from various states report a range of persistent challenges:

- Price volatility and inflation driven by insecurity and supply chain breakdowns
- Scarcity of essential goods
- Increased transportation costs, reducing profit margins
- Uncertainty in market conditions makes long-term planning difficult.

In RSF-held areas, traders face compounded difficulties:

- Economic stagnation due to population displacement and weakened purchasing power
- Lack of regulatory oversight, resulting in unregulated and unstable trading environments
- Disrupted supply chains forcing traders to seek alternative sources
- Logistical barriers including road insecurity, looting, and informal checkpoint fees.

In SAF-controlled regions, traders cite:

- Liquidity shortages and unreliable banking platforms (e.g., Bankak)
- Rising rental and storage costs, especially for refrigerated goods amid frequent power cuts
- Currency instability raising the cost of imports
- Seasonal transport challenges, particularly during the rainy season

Despite these pressures, many traders are adapting. Reported coping mechanisms include:

- Relocating businesses to safer areas with better infrastructure
- Focusing on food trade and using home-based storage
- Relying on informal lending networks for working capital

Some short-term opportunities have emerged despite the challenging conditions. In SAF-held areas, traders benefited from grain shortages, particularly millet, which created temporary profit opportunities. Shifting consumer demand enabled market diversification, while the influx of displaced populations boosted demand in states such as River Nile and Red Sea. In RSF-held areas, although more limited, traders reported the opening of new trade routes toward the west and Chad, as well as the gradual return of local populations and farmers, which is helping to revive some trade activity.

Traders across both RSF- and SAF-controlled areas report increasing regulatory and fiscal burdens. In SAF-held regions, these include higher customs dollar rates, restricted trading hours, and mandatory health card requirements. In RSF-held regions, the absence of formal oversight has led to informal and often arbitrary fee collection by armed groups, the imposition of security-related taxes, and export bans to eastern states, resulting in stockpiling and spoilage of goods.

Conclusions

Sudan’s markets remain highly volatile and fragmented due to continued conflict and economic instability. Throughout February and March 2025, sharp fluctuations in commodity prices, fuel costs, and exchange rates were observed, with regional disparities widening—particularly between conflict-affected and relatively stable states.

Cereal prices, especially for sorghum and millet, rose significantly in several areas, raising food security concerns amid limited affordability for vulnerable populations. Vegetable markets exhibited mixed trends: tomatoes became more affordable due to seasonal supply, while potatoes remained expensive and volatile. Meat and animal product prices showed relative stability overall, though localized spikes were evident for lamb and fish in certain high-demand or insecure regions.

Fuel markets were marked by sharp regional and market-based disparities. Parallel market prices for both diesel and petrol remained substantially higher than regular prices, especially in conflict-affected areas such as Darfur and Kordofan. Availability was also inconsistent, reflecting persistent logistical and supply chain disruptions.

The gap between official and parallel exchange rates persisted, reflecting limited access to formal foreign exchange markets and continued reliance on informal channels. This financial fragmentation contributes to price inflation and trade inefficiencies across markets.

Market actors reported a range of challenges—from liquidity shortages and storage constraints to informal fees and arbitrary taxation. However, they also displayed resilience by adopting coping strategies such as relocating businesses, focusing on staple food trade, and using informal credit systems. Short-term opportunities were also noted, particularly in areas experiencing displaced population inflows or shifting consumer demand.

Overall, the findings underscore the urgent need for continued market monitoring and policy responses aimed at stabilizing supply chains, addressing inflationary pressures, and supporting traders and consumers in both SAF- and RSF-controlled areas. Targeted interventions to improve logistics, protect market access, and reduce regulatory burdens could help alleviate some of the stress facing Sudan's fragile markets.

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