

# Essential Commodities Prices, Availability, and Market Actors' Perceptions

## September 2025

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### Summary

In September 2025, Sudan's markets showed relative stability despite conflict, inflation, and weather-related disruptions. Cereal and vegetable prices remained broadly stable, while meat, oilseeds, and fuel saw moderate fluctuations. Availability of most essential goods improved slightly, though Darfur states continued to record the highest prices.

The parallel exchange rate rose to about 3,100 SDG/USD, widening the gap with the official rate. Traders cited transport costs, heavy rains, and checkpoint fees as key drivers of higher prices, though logistical challenges eased from August.

Liquidity and infrastructure conditions improved: 71 percent of merchants reported no cash shortages and 93 percent faced no storage or power issues. However, security risks persisted in Darfur and Kordofan, affecting trade safety.

Profit margins remained mostly stable, while tax compliance declined, especially at the federal level. Despite ongoing challenges, merchants remain resilient—two-thirds plan to maintain current trade levels, and nearly one-fifth aim to expand, reflecting cautious optimism amid uncertainty.

## Cereals and Flour

Cereal prices showed relative and continued stability between August and September 2025. Wheat prices recorded a slight increase during September. Sorghum and sorghum prices remained stable throughout the month and slightly decreased, reflecting improved availability. Wheat flour prices remained high overall, increased slightly in September compared to August, and remained stable throughout the month.

**Figure 1:** Local prices of cereals and wheat flour, weekly average, 1000 SDG/Kg, February - September 2025

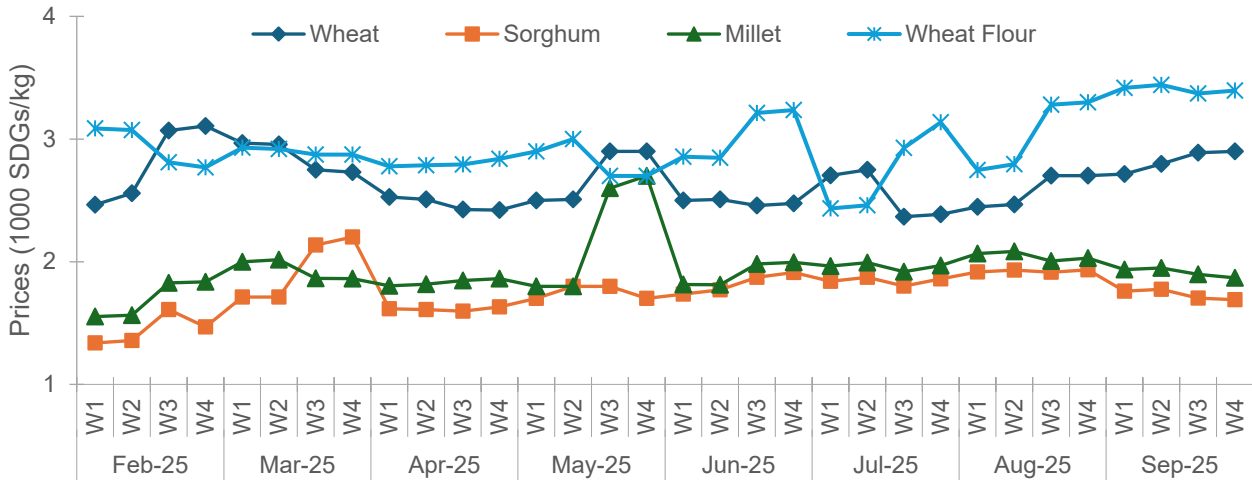


Figure 2 shows notable variation in cereal prices across Sudanese states between August and September 2025. Wheat and wheat flour remained the most expensive cereals overall, with the highest prices observed in West Darfur (7k SDG/kg in August and 6k SDG/kg in September) and South Darfur. Sorghum and millet prices were considerably lower and more stable across states, except for sorghum prices in River Nile state being relatively high in August and increasing by 17 percent in September. Overall, Figure 2 highlights sharp regional disparities, with Darfur states consistently exhibiting the highest wheat and wheat flour prices, underscoring the persistence of supply and accessibility constraints in conflict-affected areas.

**Figure 2:** Local monthly average prices of cereals across states, 1000 SDG/Kg, August-September 2025

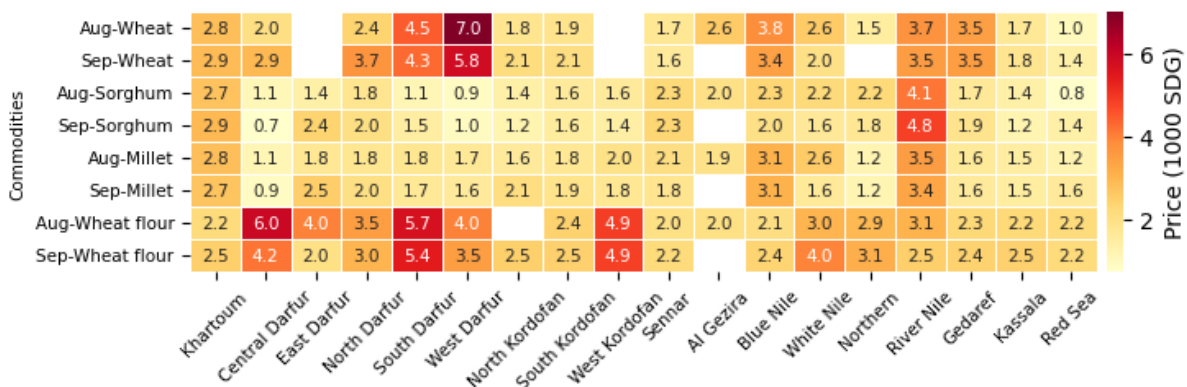


Figure 3 shows the perceived availability of cereals and wheat flour from February to September 2025. In September, the availability of most cereals improved slightly compared to August, following earlier months of decline. The share of traders reporting high availability of wheat increased moderately from 27 percent in August to 34 percent in September. Sorghum’s availability also increased, with traders reporting a high availability increased from 46 percent in August to 61 percent in September. Millet availability also improved slightly from 41 percent in August to 51 percent in September.

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

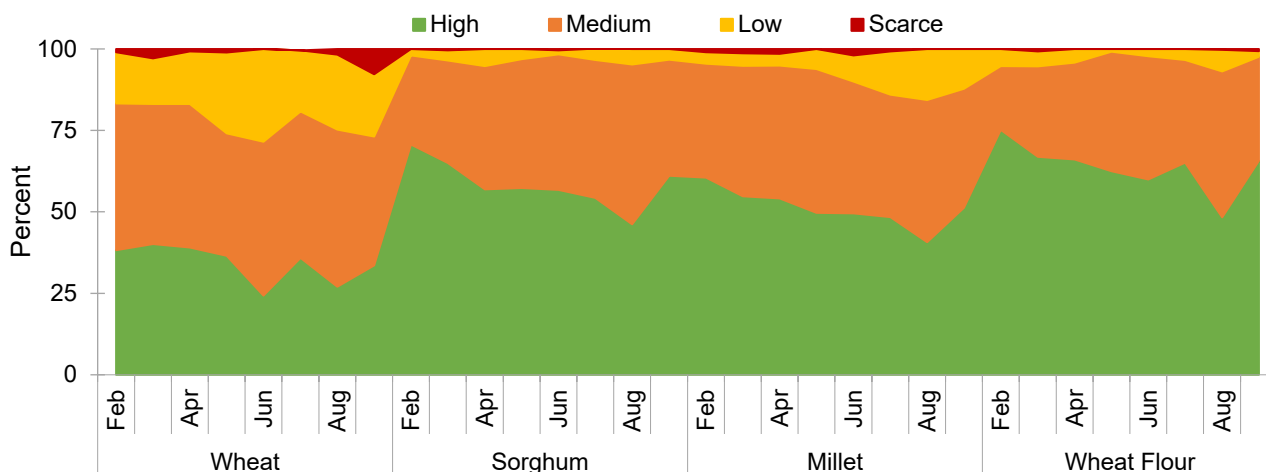
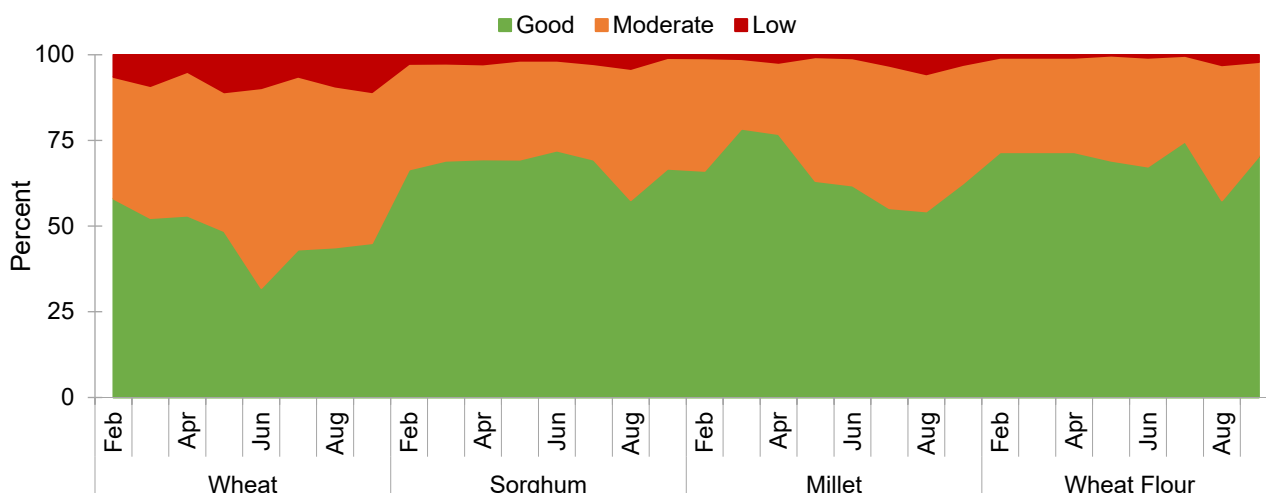


Figure 4 shows traders' perceptions of cereal and wheat flour quality from February to September 2025. For all cereals, quality reporting improved in September compared to August, with the share of traders rating it as good rising by 2 percent, 19 percent, 24 percent, and 38 percent for wheat, sorghum, millet and wheat flour, respectively.

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



## Vegetables

Figure 5 shows the vegetable prices from February to September 2025. In September, vegetable prices showed a mixed but generally stable trend. Tomato prices, which had fluctuated heavily during July and August, increased slightly in September until the third week of the month. Potato prices, which are consistently higher than other vegetables, decreased and stabilized in September compared to August, mirroring the perceived improvement in potatoes' availability shown in Figure 7. Onion prices remained relatively low and more stable throughout September.

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

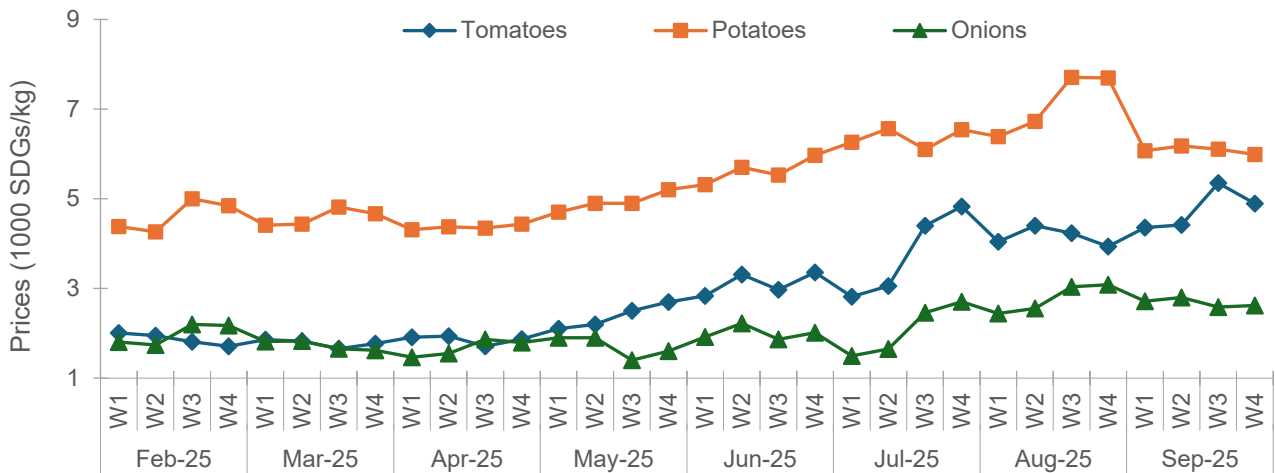


Figure 6 shows that regional disparities in vegetable prices persisted in September across Sudan markets. Tomato prices rose significantly in several states, with the highest levels recorded in South and West Darfur, Kassala and North Kordofan, while the lowest prices were recorded in Red Sea as well as East and North Darfur, and South Kordofan. Potato prices also showed mixed trends with the highest prices recorded in West Kordofan and Sennar, though still lower than their record high level in August in North Kordofan of 13.5k SDGs/kg. While onion prices were relatively more stable, some variation persists, with the highest prices recorded in River Nile and West Kordofan state. These trends reflect deep imbalances in supply chains, availability issues and market access across the country.

**Figure 6:** Local monthly average prices of vegetables across states, 1000 SDG/Kg, August-September 2025

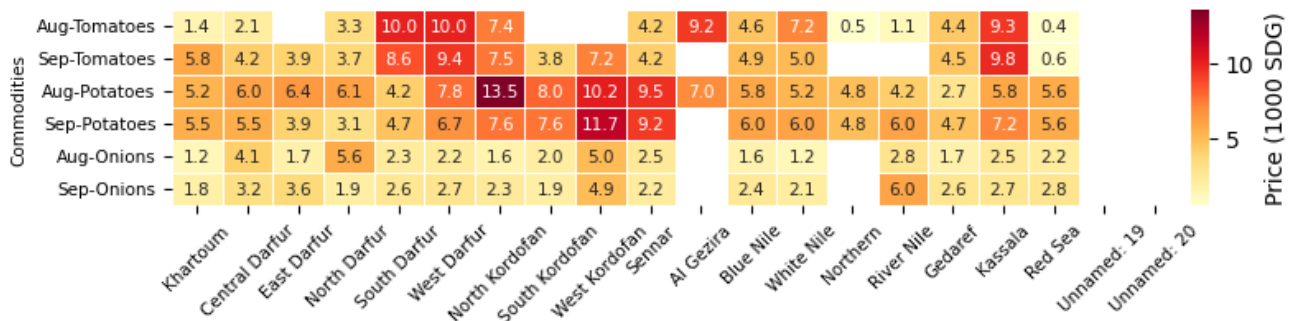


Figure 7 shows an improvement in the availability of vegetables in September compared to August. The share of traders reporting high availability of tomatoes, potatoes, and onions increased by 29 percent, 39 percent, and 21 percent, respectively in August compared to September.

**Figure 7: Vegetable availability scores, February - September 2025**

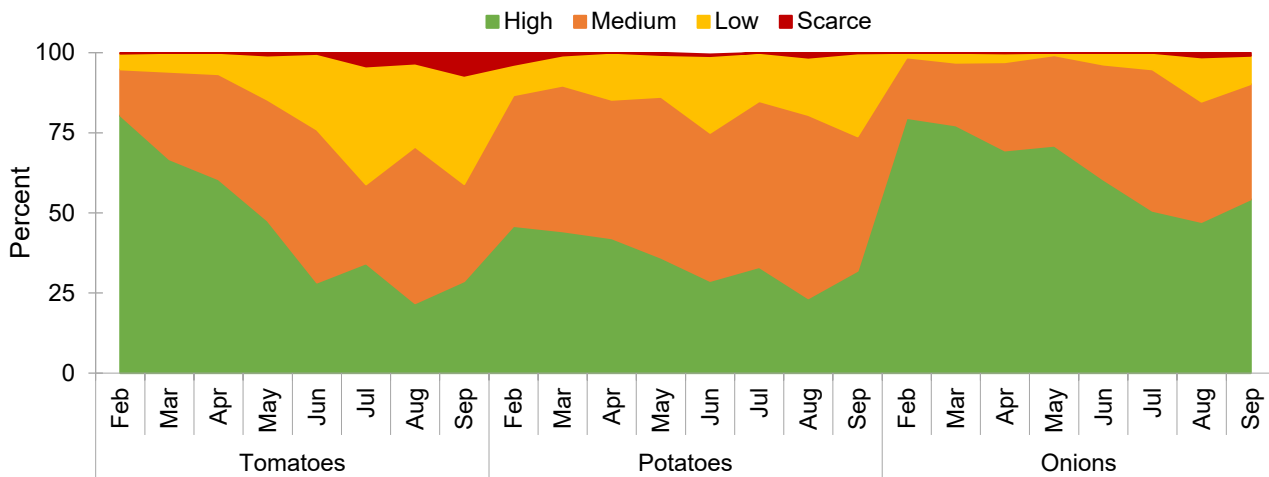
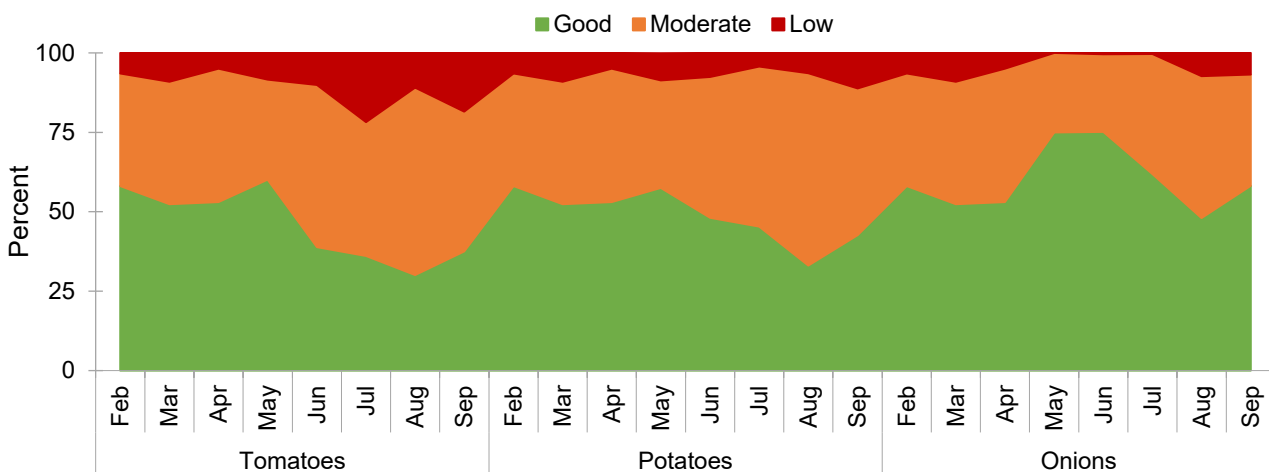


Figure 8 shows traders' perceptions of vegetable quality from February to September 2025, revealing a notable improvement across commodities in September compared to August. Tomato, potatoes, and onions good quality reporting increased in September compared to August by 27 percent, 30 percent, and 21 percent, respectively.

**Figure 8: Vegetable quality scores, February - September 2025**



## Meat and Animal Products

Figure 9 illustrates the price trends for meat and animal products from February to September 2025. During this period, both lamb and beef prices showed a consistent upward trend, eventually stabilizing in September. Chicken prices were more volatile but began to decline towards the end of the period. Milk prices experienced a notable drop in September, while fish prices increased during the same month. In contrast, egg prices remained relatively stable throughout the entire period.

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

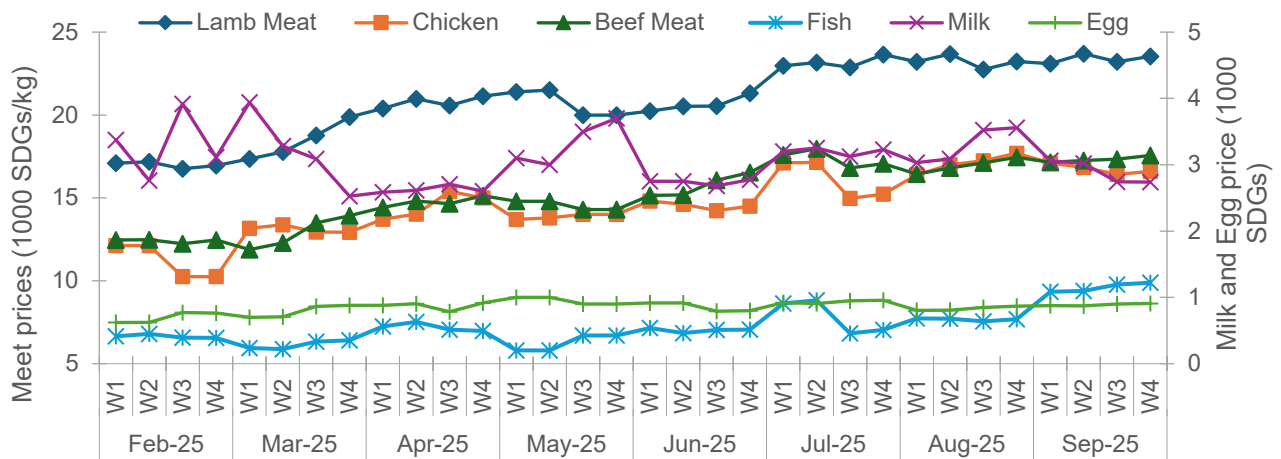


Figure 10 presents meat and animal products prices across Sudan's states for August and September 2025. Notably, North Darfur recorded the lowest September prices across all meat items covered, less than one-fourth of the highest prices observed. Kassala reported the highest September prices for both lamb and beef. River Nile state registered the highest September price for chicken, which also saw the largest month-on-month increase compared to August. Meanwhile, the highest September price for fish was recorded in Central Darfur.

**Figure 10:** Local prices of meat and animal products across states (1000 SDGs), August-September 2025.

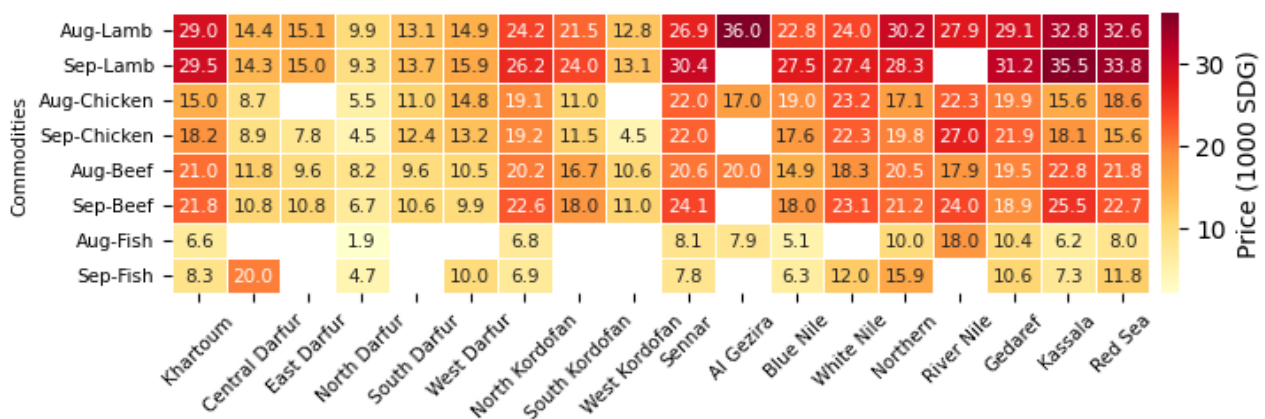


Figure 11 illustrates the changing trends in the availability of meat and animal products as reported by traders between February and September 2025. Throughout this period, the share of traders reporting high availability of lamb and beef steadily declined, with a sign of recovery observed in September. In contrast, fish availability improved over time, with more traders reporting high availability. For chicken, the share of traders reporting low availability peaked in September. Milk's availability showed positive momentum starting in June, with a growing share of traders reporting high availability. Egg availability followed a downward trend from July, with fewer traders reporting high availability and a corresponding increase in reports of low availability.

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

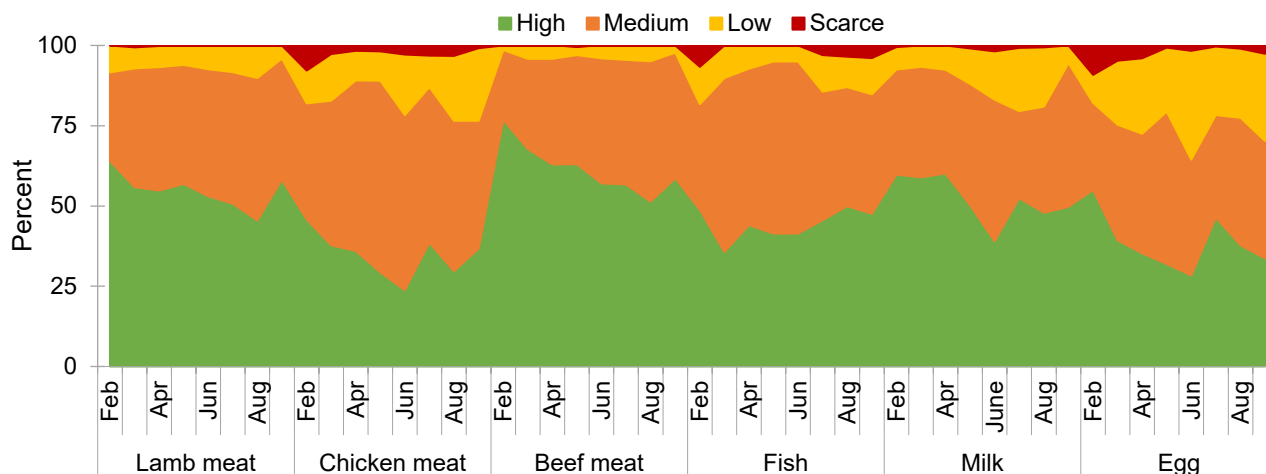
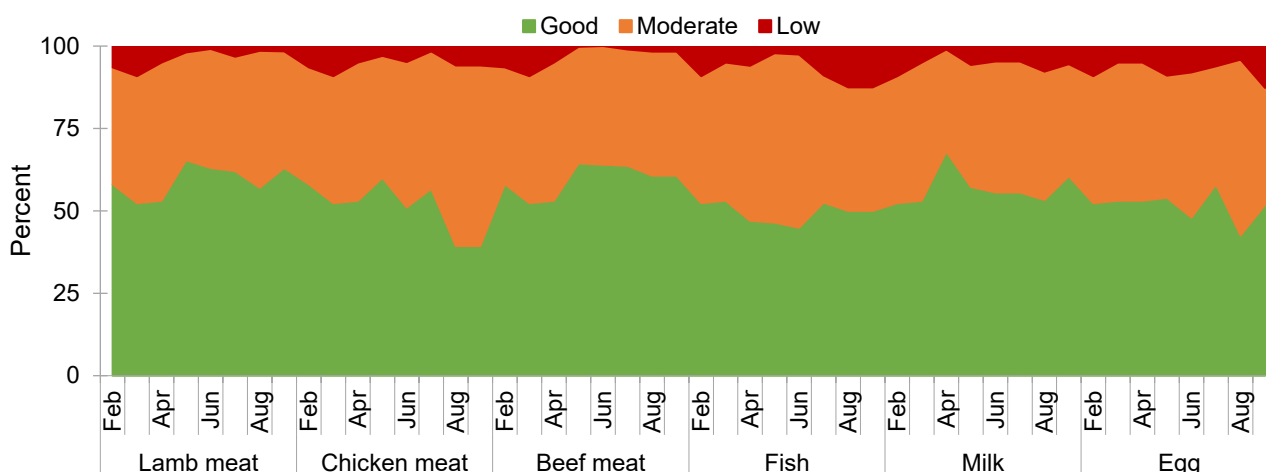


Figure 12 shows that the perceived quality of meat and animal products varied across commodities between February and September 2025. For lamb, beef, and milk, more than 50 percent of traders consistently reported good quality throughout the period. In contrast, the share of traders reporting high-quality chicken reached its lowest point in August and September. Fish quality also declined, with the highest share of traders reporting low quality during those two months. Similarly, the share of traders reporting low-quality eggs peaked in September.

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



## Oilseeds, Cooking Oils, Sugar, and Fava Beans

As illustrated in Figure 13, sugar and fava bean prices saw an increase at the end of September, following a decline earlier in the month. In contrast, cooking oil prices dropped towards the end of September. Sesame prices stabilized during September after a prolonged period of fluctuations. Groundnut prices have been rising steadily since the end of August, while sunflower prices have remained stable since August.

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

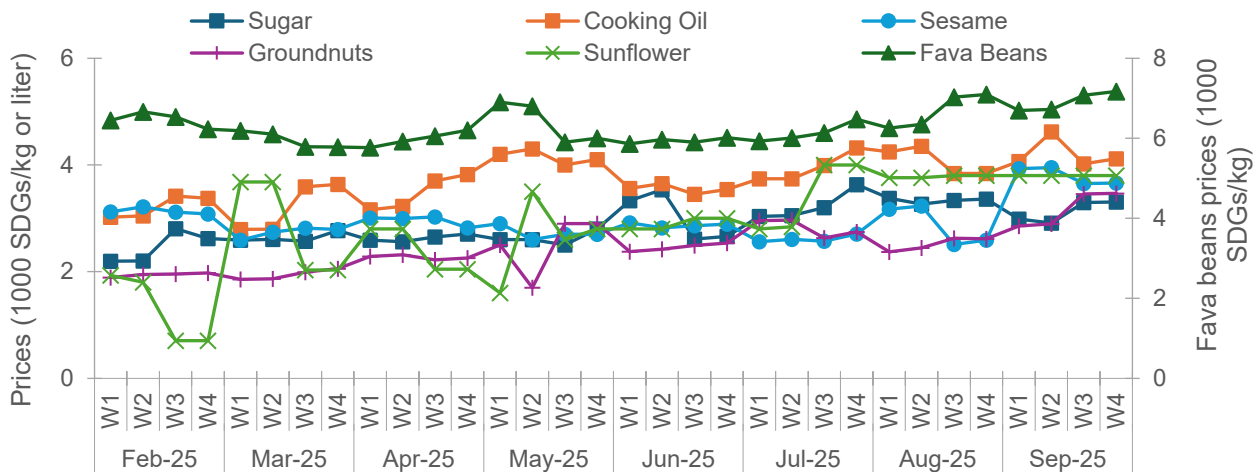


Figure 14 highlights notable shifts and regional disparities in the prices of oilseeds, cooking oils, sugar, and fava beans during August and September 2025. Khartoum recorded the highest September prices for both sesame and groundnuts. South Darfur reported the highest September price for fava beans, as well as the largest price increase for sugar between August and September. North Darfur registered the highest price for sugar overall. For cooking oils, River Nile and South Kordofan recorded the lowest prices in September, while Kassala reported the highest. For several commodities—including sesame, groundnuts, and fava beans, the highest prices observed were up to four times greater than the lowest, underscoring significant regional price disparities.

**Figure 14:** Oilseeds, cooking oils, sugar, and fava beans prices (1000 SDGs) across states, August-September 2025

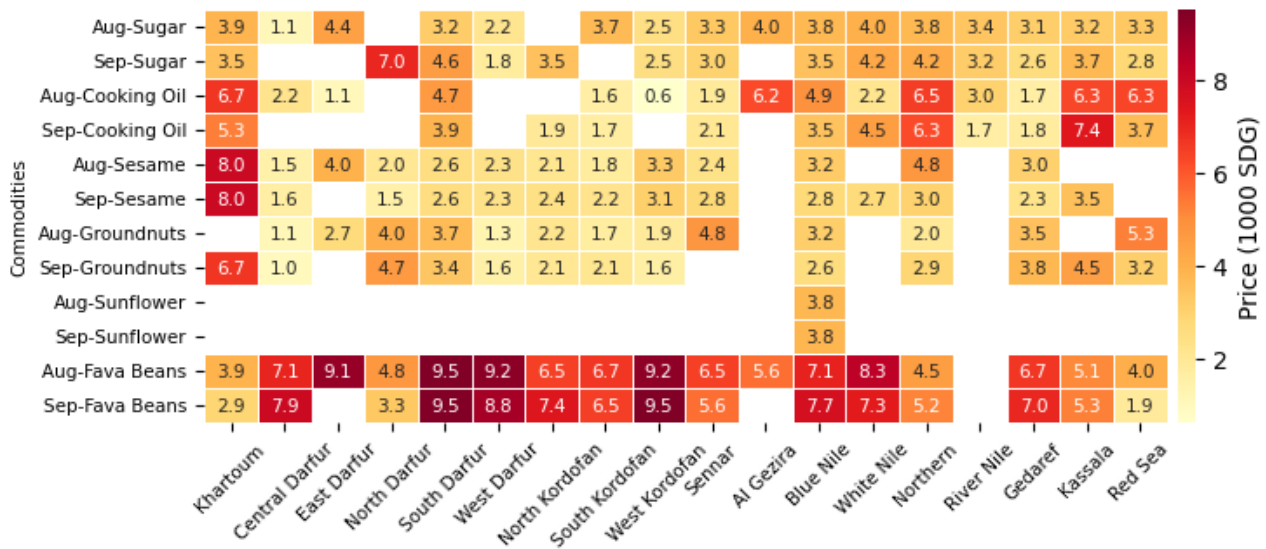


Figure 15 presents trader-reported availability trends for oilseeds, cooking oils, sugar, and fava beans between February and September 2025. Most commodities showed a declining trend in the share of traders reporting high availability over the period. Cooking oils and sugar experienced a noticeable drop in reported high availability in August, followed by a recovery in September. Sesame, groundnuts, and fava beans followed a similar downward trend, with reports of low availability reaching their highest levels in September. Sunflower stood out with consistently low reports of high availability and the highest levels of low availability across all commodities from March to September.

**Figure 15:** Oilseeds, cooking oils, sugar, and fava beans availability scores, February - September 2025

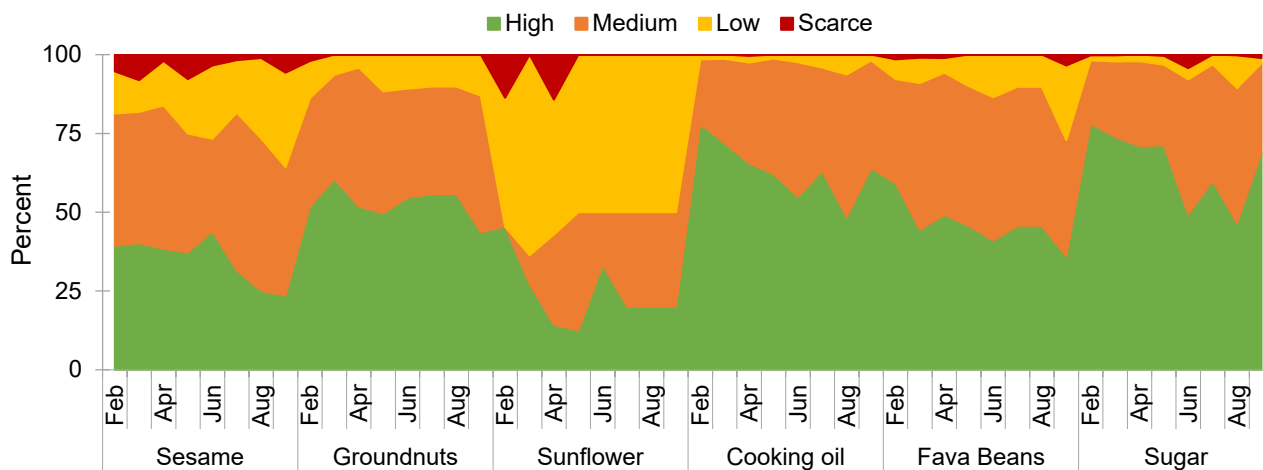
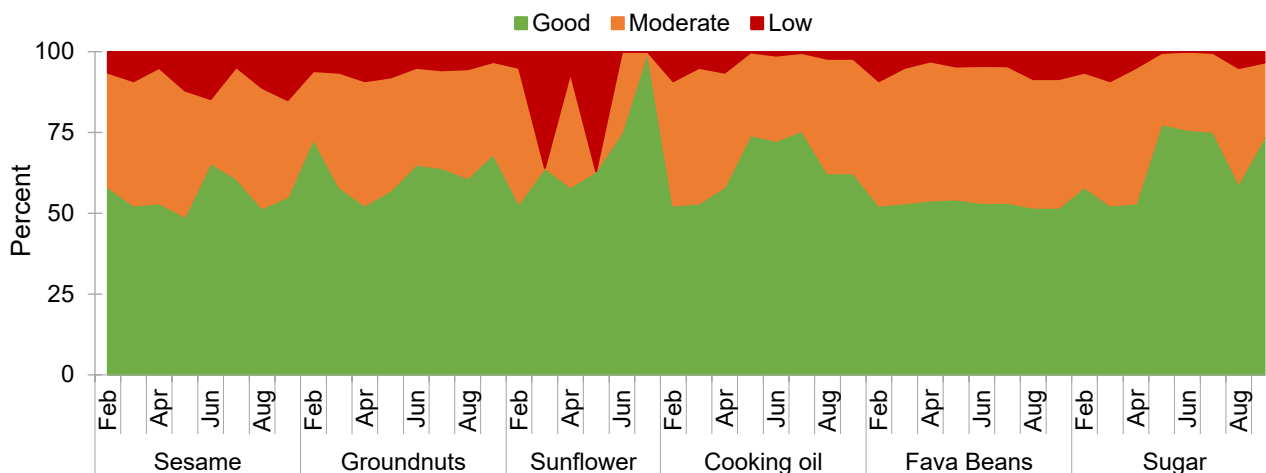


Figure 16 shows trends in the perceived quality of oilseeds, cooking oils, sugar, and fava beans between February and September 2025. For sesame, groundnuts, and sugar, the share of traders reporting good quality rebounded in September after a decline in July and August. Cooking oils and fava beans maintained their August quality levels through September. Sunflower data stopped in July, with a notable 100 percent of traders reporting high quality at that time.

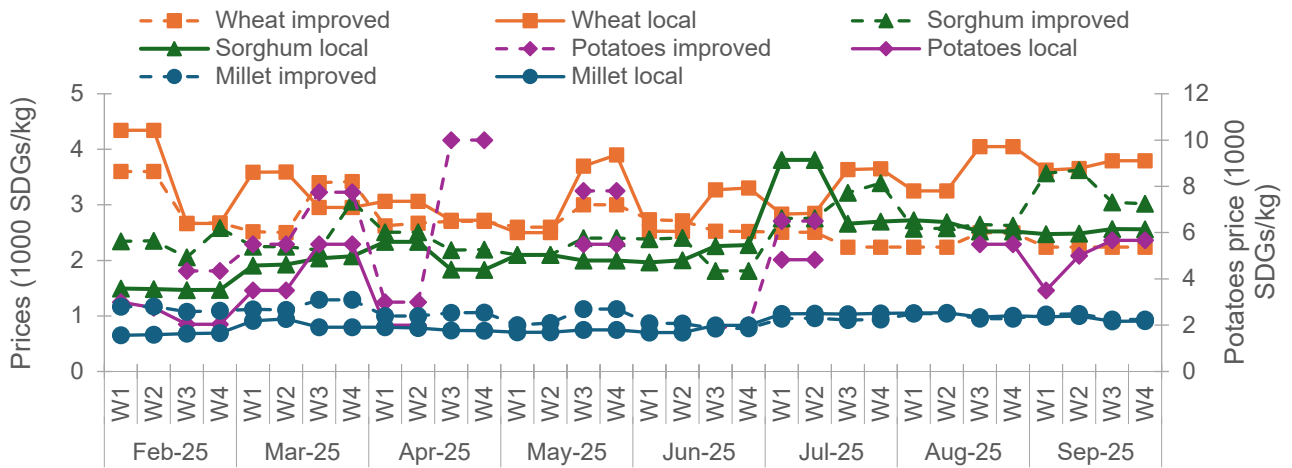
**Figure 16:** Oilseeds, cooking oils, sugar, and fava beans quality scores, February - September 2025



### Seeds (Improved and Local)

Most improved and local seed prices remained relatively stable throughout September. Both improved and local wheat prices are largely stable, and prices of improved and local millet seeds have also remained steady since July 2025. In contrast, improved sorghum prices exhibited some fluctuation, rising from late August to mid-September before declining in the final two weeks of the month, while local sorghum prices remained stable. The price of local potato seeds also fluctuated slightly, increasing at the beginning of September before stabilizing thereafter.

**Figure 17: Local seeds prices (1000 SDG/Kg), monthly average, February – September 2025**



## Diesel and Petrol

Throughout February to September 2025, fuel prices fluctuated moderately but trended upward overall, with sharper movements toward the end of the period. Between August and September, prices rose across all fuel types, led by petrol parallel, which climbed from about 6.0 to over 7.0 SDGs/Liter. Regular petrol and diesel also increased moderately. Within September, prices surged during the first two weeks, peaked in week 3, and then slightly eased, reflecting mounting pressure in the parallel market (Figure 18).

**Figure 18: Local fuel prices, SDGs/Liter, monthly average, February - September 2025**

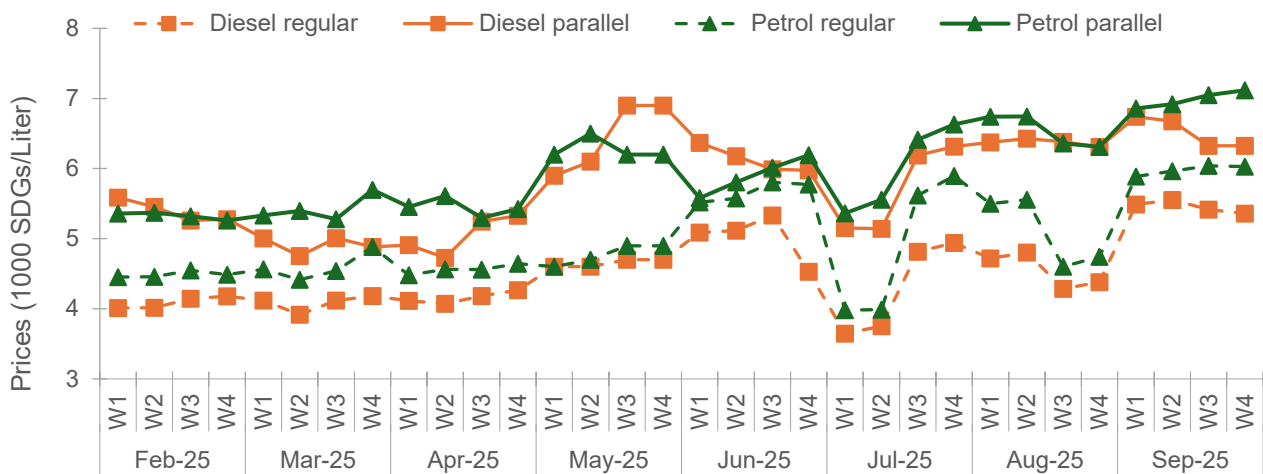
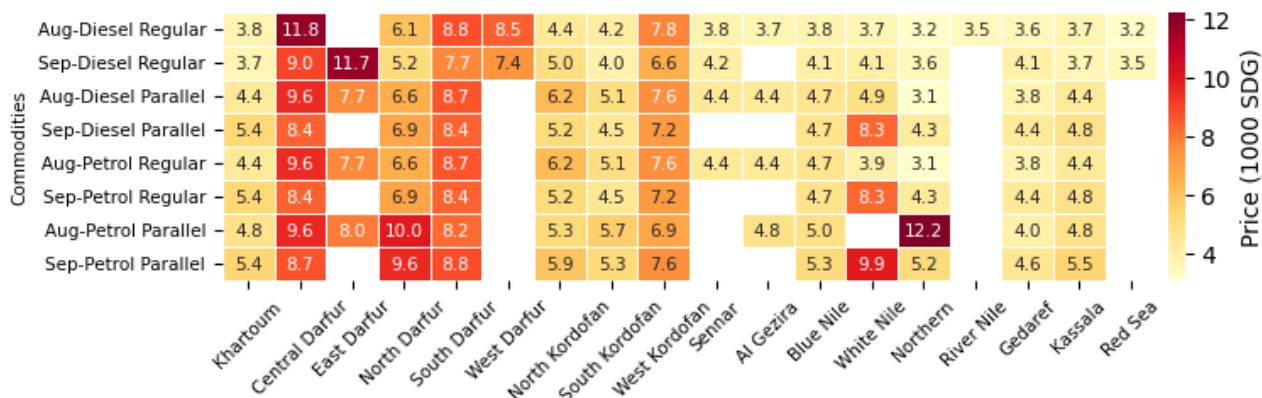


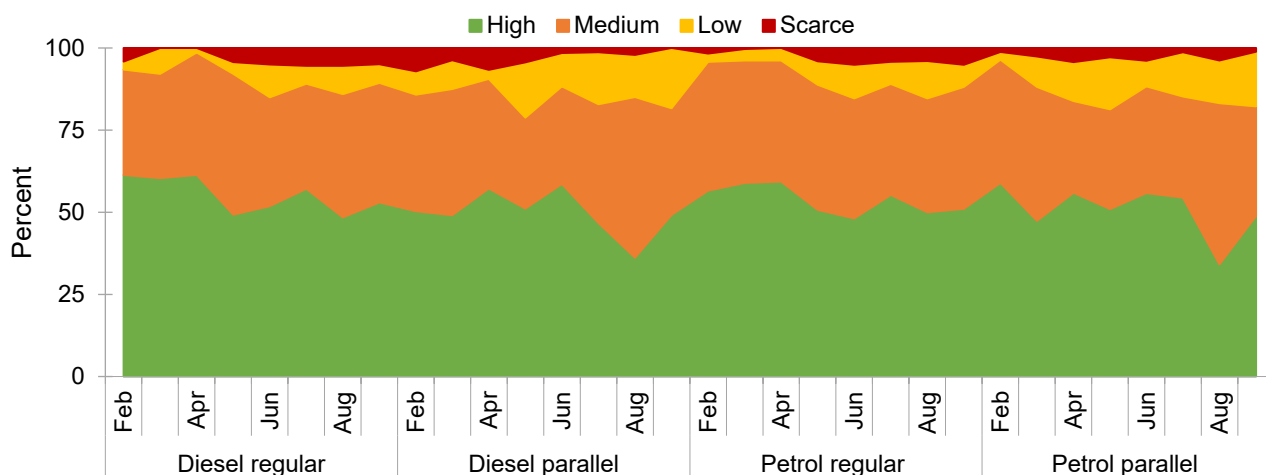
Figure 19 shows the spatial and temporal dynamics of fuel prices across states. While fuel prices declined in September in the Darfur states, they remained considerably higher than in other regions. For instance, the regular market price of diesel in Central Darfur fell from about 12,000 SDG per liter in August to around 9,000 SDG per liter in September. In contrast, prices increased in most non-Darfur states. The gap between parallel and regular market diesel prices was particularly wide in conflict-affected and remote areas, such as Central and South Darfur. Similarly, both regular and parallel market petrol prices were higher in the Darfur states and White Nile, though they declined across most states in September except South Darfur.

**Figure 19:** Fuel prices across states, 1000 SDGs/Liter, August-September 2025



Traders’ perceptions of fuel availability improved in September compared to August across both regular and parallel markets. In the regular market, the share of traders reporting high availability of diesel and petrol rose from 48 to 53 percent and from 50 to 51 percent, respectively (Figure 20). Similarly, in the parallel market, the proportion of traders reporting high availability increased from 36 to 49 percent for diesel and from 34 to 49 percent for petrol, respectively. This improvement in perceived availability may partly explain the observed decline in fuel prices during September, as shown in Figure 19.

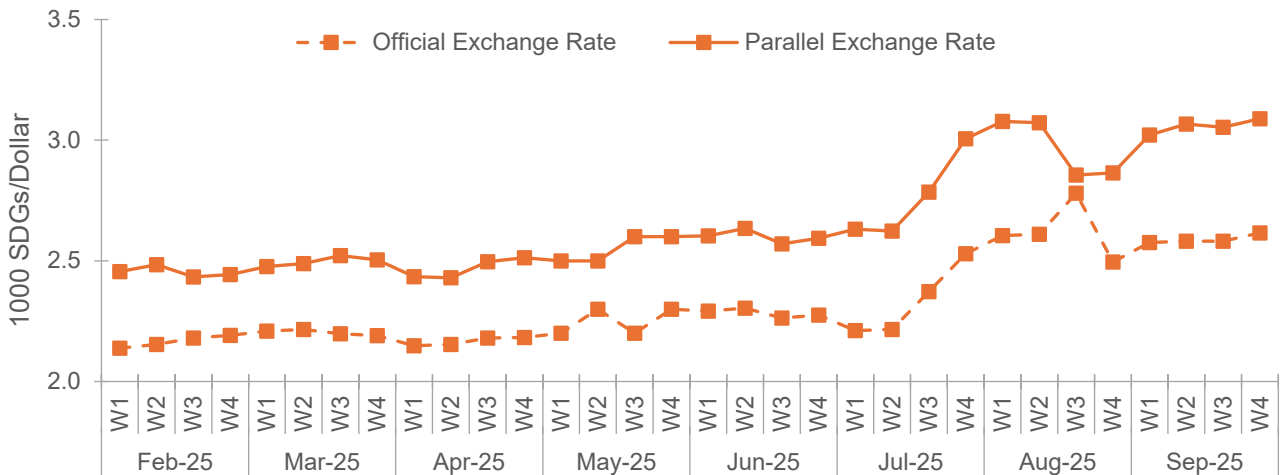
**Figure 20:** Fuel availability scores, February - September 2025



## Exchange Rates

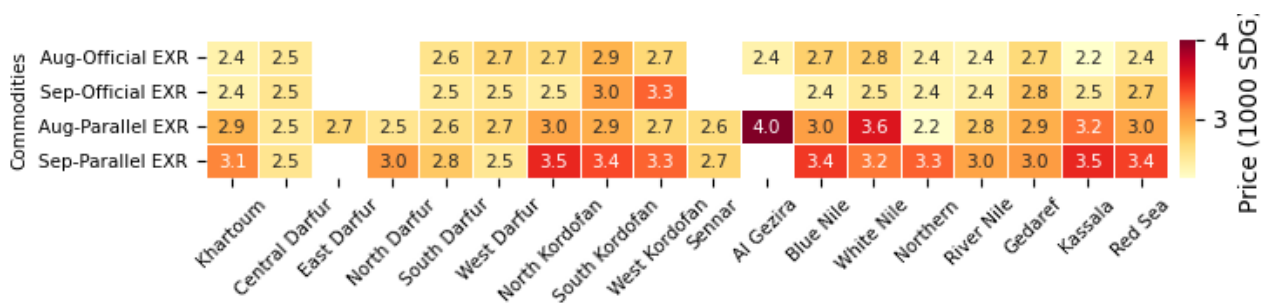
Between August and September 2025, both the official and parallel exchange rates showed divergent movements. The parallel market rate increased steadily throughout September, rising from around 2,900 SDG/USD at the end of August to about 3,100 SDG/USD by late September, indicating renewed pressure in the informal foreign exchange market. In contrast, the official exchange rate remained relatively stable after a brief dip in late August, fluctuating only slightly around 2,500 SDG/USD. The gap between the two rates, which had narrowed in mid-August, widened again in September.

**Figure 21:** Exchange Rate, SDG/US Dollar, February –September 2025



Between August and September 2025, the official exchange rate remained broadly stable across states, averaging around 2.4k–2.7k SDGs per USD. However, parallel market rates increased in most states, with the sharpest rises observed in North Kordofan, Blue Nile, and Kassala, where rates exceeded 3.4k–3.5k per USD. Spatially, eastern and southeastern states continued to record the highest exchange rates, while Khartoum and North and South Darfur states maintained comparatively lower levels, reflecting widening regional disparities in currency valuation and market access.

**Figure 22:** Units of 1000 SDGs to one US dollar exchange rates across states, August-September 2025



## Market Actors' Perceptions

In September 2025, 111 merchants across 13 states were surveyed about market functionality. Out of the surveyed merchants, 59.5 percent were medium-scale traders, 26.1 large-scale traders, and 14.4 percent small-scale traders. The results highlight continued challenges linked to supply chains in particular regions, demand fluctuations, financial conditions, storage, and security, alongside modest changes in profits, the burden of taxes and fees, and cautious future plans.

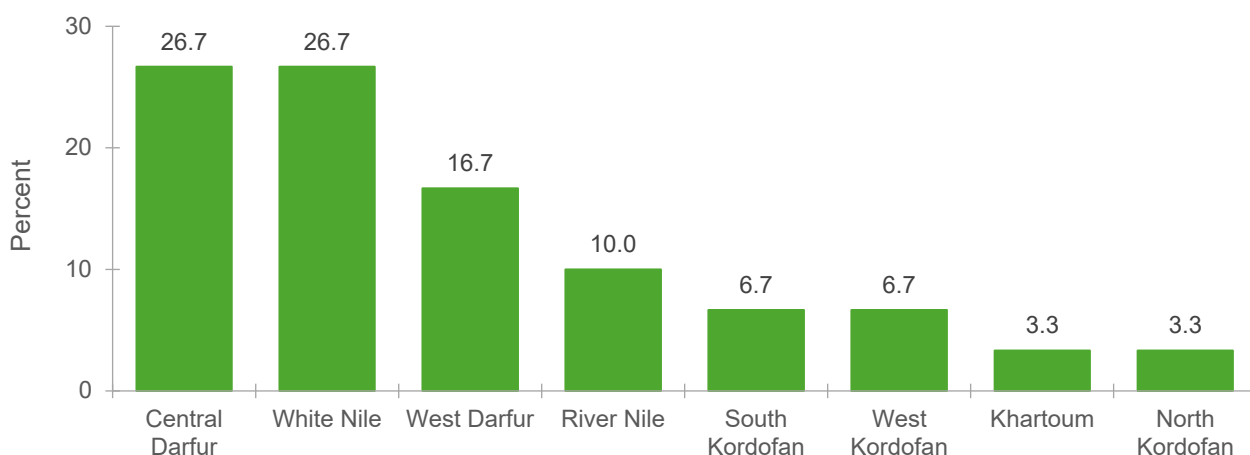
### Challenges Facing Merchants

#### Supply Chain and Logistics

The share of merchants reporting transportation and logistical problems in September declined compared to August. Figure 23 shows that these challenges were concentrated in Central Darfur, White Nile, West Darfur, and River Nile states, with Khartoum and North Kordofan reporting slightly fewer challenges. In the Darfur region, heavy rains and checkpoint fees were reported, resulting in substantially higher transport costs. In contrast, Kordofan experienced slightly fewer supply chain challenges, though merchants still cited heavy rains and blocked roads as major obstacles to importing

goods. Smaller traders in the region also faced difficulties obtaining security permits for the movement of goods. Similarly, White Nile State suffered from road blockages caused by heavy rains, while in River Nile State, rising transport costs posed significant challenges to the movement of goods.

**Figure 23:** Proportion of merchants facing supply chain challenges, by state (N=30)



Merchants across the 13 states reported that supply chain challenges—particularly delays in importing goods and rising transport costs—continue to drive up consumer prices. In West Darfur, a notable shortage of fertilizers was observed in September. In response, merchants have adopted various coping strategies: some reduced their profit margins, but more commonly, they maintained margins by increasing prices, purchasing goods in smaller quantities, or limiting imports from other regions. In White Nile State, all surveyed merchants reported sourcing goods exclusively from within the state.

### **Demand Conditions**

Like August, about 38 percent of merchants report changes in demand in September. Declines in demand were most evident in Red Sea, White Nile, West Darfur and Central Darfur, while demand seemed relatively stable in the Kordofan region, and increased in Khartoum given the increased number of returnees to the state.

In the Darfur region, merchants reported a decline in demand driven by several factors, including rising prices linked to higher transportation costs and reduced customer presence in markets, as many people were engaged in farming activities during the rainy season. In contrast, merchants in Red Sea State attributed lower demand to increasing inflation and declining household incomes, which led consumers to either purchase smaller quantities or forego non-essential goods altogether.

### **Financial and Liquidity Constraints**

Financial and liquidity conditions continued to improve in September compared to previous months. About 71.2 percent of merchants reported no financial or liquidity constraints, up from 60.9 percent in August, indicating better access to cash, trade, and transaction facilities.

Despite this overall progress, regional disparities persist. Liquidity challenges remain in Central Darfur (28 percent), West Darfur (28 percent), and Red Sea (25 percent). However, in West Darfur and Red Sea, these figures represent a notable improvement from August levels (60 percent and 46 percent, respectively).

Merchants in Central Darfur reported a 15 percent increase in transaction costs when trading in cash due to scarcity of cash in the state. Similarly, traders in other Darfur and Kordofan states highlighted

continued difficulties related to bank closures and limited cash availability among consumers, constraining trade activities. In states with functional banking systems—including Red Sea, River Nile, and White Nile—merchants noted that bank-imposed caps on cash withdrawals hinder their ability to import goods and conduct transactions efficiently. Overall, most merchants preferred cash-based trade over mobile banking platforms such as Bankak, citing lower transaction costs.

Liquidity challenges also affect labor markets. In September, however, no major difficulties were reported in paying daily laborers. About 56.8 percent of surveyed merchants reported no issues in hiring or compensating workers, especially in White Nile, North Kordofan, North Darfur, and Khartoum. The remaining 43.2 percent indicated they do not employ daily laborers, with the highest shares of no hiring daily workers observed in Central Darfur, Gedaref, Red Sea, and West Darfur.

### **Storage and Power Access**

In September, merchants across the 13 states reported notable improvements in access to storage and power. About 92.7 percent of respondents indicated no challenges in either area, up from 87.6 percent in August, reflecting a continued recovery in basic market infrastructure.

Reported storage facilities are concentrated in two states: Red Sea (50 percent) and Central Darfur (50 percent). In Red Sea State, merchants cited power outages as the main obstacle to proper storage of goods. In Central Darfur, however, security concerns persist; many traders are compelled to store commodities at home or in rural areas due to both direct and indirect conflict-related risks.

### **Safety and Security**

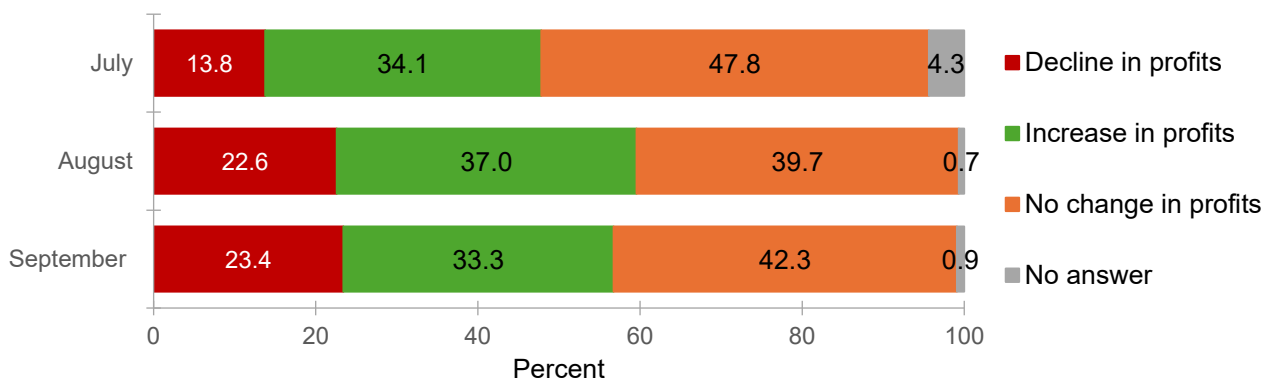
Market safety showed similar trends in September compared to August, where only 4.5 percent of merchants report lack of safety and security in the markets (marginally up from 4.1 percent in August). Security and safety concerns continue to persist in several states, particularly Central Darfur, North Darfur, South Kordofan, and West Kordofan. In Central Darfur and South Kordofan, merchants reported incidents of vandalism and armed robbery within markets and along trade routes. Meanwhile, in North Darfur and West Kordofan, traders expressed ongoing fears of active combat and airstrikes in densely populated markets. These security threats not only heighten the risk of capital losses but also contribute to unstable market operations, affecting prices, profits, and overall trade functionality.

### ***Profits and Profitability Trends***

Merchants across the 13 surveyed states reported generally stable profit margins between July and September 2025, though the distribution of profit changes varied slightly across months. As shown in Figure 24, the share of merchants reporting no change in profits declined from 47.8 percent in July to 39.7 percent in August, before rising again to 42.3 percent in September, indicating a gradual recovery in stability after an August dip.

The proportion of merchants reporting increased profits also showed a mild decline over the three months, dropping from 34.1 percent in July to 33.3 percent in September. Meanwhile, those experiencing declines in profits rose from 13.8 percent in July to 22.6 percent in August, and further to 23.4 percent in September, indicating that while most traders maintained stability, a small but consistent share continued to face financial pressure.

**Figure 24:** Percentage of merchants reporting changes in profits (July-September 2025)



Overall, the data point to a mixed but stabilizing profitability pattern, with most merchants either maintaining steady profits or reporting moderate gains by September, reflecting gradual market adjustment amid persistent cost and demand challenges.

### Taxes and Fees

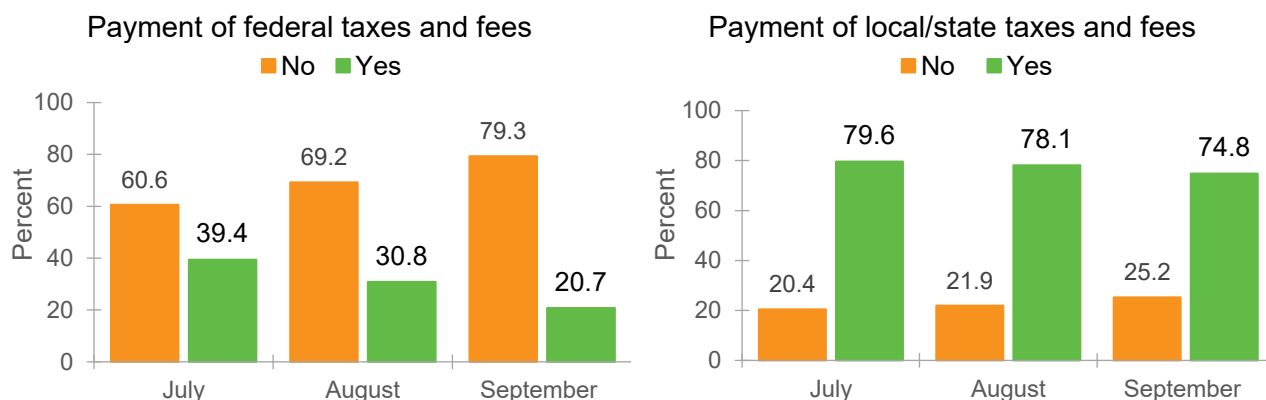
Between July and September 2025, merchants across the surveyed states reported that taxes, customs, and local levies continued to raise commodity prices and reduce consumer demand. As shown in Figure 25, the share of merchants paying federal taxes or customs declined sharply from 39.4 percent in July to 20.7 percent in September. Payments of local or state taxes also fell slightly, from 79.6 percent to 74.8 percent, reflecting a gradual contraction in formal tax compliance amid insecurity and weak administration.

At the federal level, common taxes included value-added tax (VAT), trade licenses, annual profit taxes, and customs duties. At the state and local levels, merchants mainly paid weekly or monthly fees for market organization, sanitation, health services, and Zakat.

Merchants in Central Darfur, Red Sea, and White Nile were the most frequent taxpayers, while those in West Darfur, North Darfur, and White Nile were least likely to pay federal taxes. Among those who did, 73.9 percent viewed these payments as beneficial for domestic trade, up from 51 percent in August. However, many still noted that taxation cuts into profit margins and pushes prices upward, fueling inflationary pressures.

Perceptions of state and local fees also improved. About 68.7 percent of merchants—up from 60.5 percent in August—considered them useful for market organization and functionality. These fees were most common in North Kordofan, Sennar, White Nile, and Khartoum, while in Darfur states, traders often paid informal, ad hoc charges to local authorities for market security instead of formal levies.

**Figure 25:** Percentage of merchants reporting payments of federal and local taxes and government fees (July-September 2025)



## *Traders' Future Outlook*

Overall, 66.7 percent of surveyed merchants plan to continue trading at current levels, without changing the volume or location of their activities. A smaller share, 18 percent, intend to increase their trade volume, mainly in Khartoum, Sennar, and the Kordofan states.

Only 4.5 percent plan to change the type of goods traded, mostly in the Darfur region and White Nile, reflecting the seasonal nature and relative affordability of locally sourced commodities. Another 4.5 percent expect to reduce trade volumes over the next one to three months, with a scattered distribution across states. Finally, 1.8 percent of merchants plan to relocate to other markets, while 4.5 percent remain uncertain about their short-term plans.

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