



Essential Commodities Prices, Availability, and Market Actors’ Perceptions

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Background and Approach

Sudan faces significant challenges due to prolonged conflicts, political instability, and economic disruptions. The ongoing conflict is disrupting market systems, exacerbating price volatility, and limiting the availability of essential commodities. Supply chain disruptions, insecurity, and infrastructure damage often restrict market access and contribute to rising food and fuel costs. In conflict-affected areas, transportation and security challenges intensify price disparities, making staple foods and key agricultural inputs increasingly unaffordable, especially for vulnerable populations.

The International Food Policy Research Institute (IFPRI) is conducting a comprehensive market monitoring initiative across Sudan’s 18 states, tracking the prices and assessing the availability and quality of essential commodities, observing changes in exchange rates, and gathering qualitative insights from market actors. This report provides an overview of market trends in Sudan during February 2025. It will be updated monthly.

To collect these data, we survey 36 markets - two markets in each of Sudan’s 18 states. Structured questionnaires and semi-structured interviews are used to obtain the data, ensuring that over time

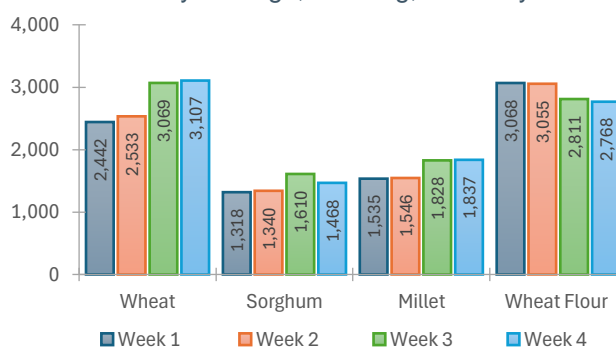
we obtain comparable quantitative and qualitative insights into Sudan's volatile market conditions. Five merchants in each market are interviewed in each round of data collection. Two rounds are done each month, with the first covering the first two weeks and the second covering the last two weeks of the month. This fortnightly approach enables real-time tracking of price trends and commodity availability, offering timely insights into shifting market conditions.

In addition to asking them the prices of essential commodities, market actors across the 36 markets are also asked to rank the availability of those commodities using four categories: high, medium, low, and scarce availability. They are also asked to rank the quality of the commodities available in their market using three categories - good, moderate, and low quality. Where relevant, this information on availability and quality is provided for each commodity in this report.¹

Cereals and Flour

- ▶ Wheat price rose steadily, likely reflecting its relatively limited availability and low quality (Figures 3 and 4).
- ▶ Sorghum prices fluctuated.
- ▶ Millet experienced a gradual price rise over the four weeks.
- ▶ The average price of wheat flour dropped by more than 10 percent over the month possibly due to its relatively high availability in the market (Figure 3).

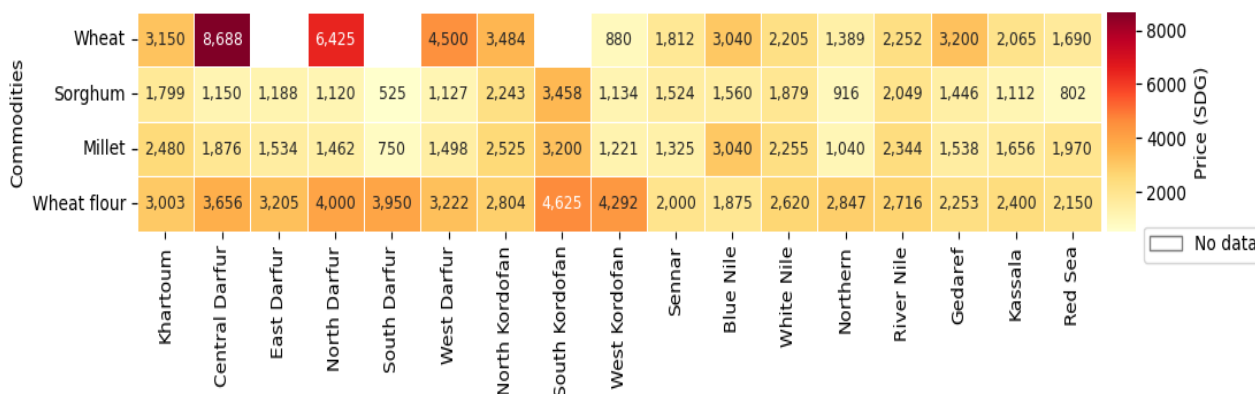
Figure 1: Local prices of cereals and wheat flour, weekly average, SDG/Kg, February 2025



The heatmap (Figure 2) displays the spatial variation in retail prices of wheat, sorghum, millet, and wheat flour across 17 of the 18 states of Sudan.²

Wheat prices exhibit the highest degree of spatial disparity, with the highest observed price being more than 6 times greater than the lowest. In contrast, sorghum and millet prices show relatively narrower ranges. These disparities are potentially driven by the respective availabilities of the commodities in the market (Figure 3) and underline the need for localized responses and targeted support to ensure cereal accessibility in the most conflict-affected states.

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

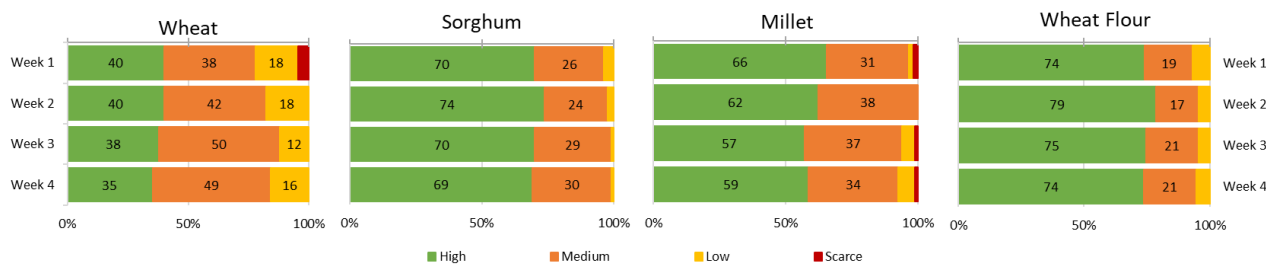


¹ The weblink to the data used in this and upcoming monthly reports will be made available online in the future.

² Data for Aj Jazira state were not collected this month due to ongoing conflict following the recent retaking of the area by the SAF. However, the market and availability information of this state will be included in upcoming reports.

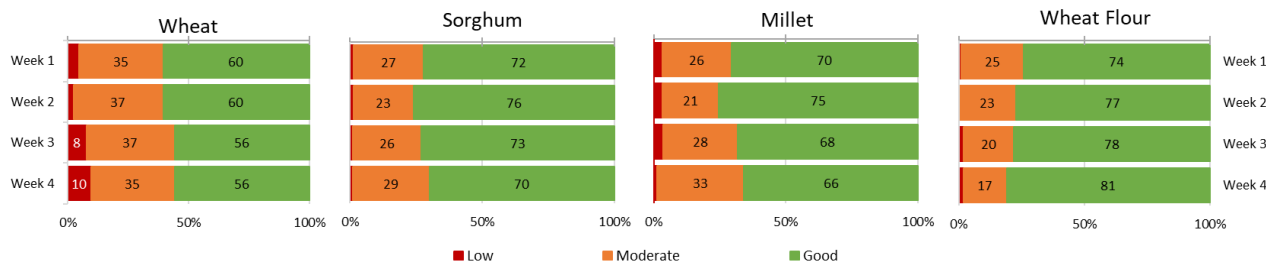
Most of the market actors reported either high or medium availability of wheat, sorghum, millet, and wheat flour in the market (Figure 3). However, a nontrivial share (16–18%) of market actors reported that the availability of wheat is either low or scarce and majority (38– 9%) of them reported medium availability of wheat in the market.

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



The quality of wheat, sorghum, millet, and flour remained largely stable. Reports of low-quality wheat rose over the four-weeks, with nearly 10% of merchants reporting availability of low quality of wheat in the market. Interestingly, the share of low-quality sorghum, millet, and wheat flour remained very minimal (Figure 4).

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



Vegetables

- ▶ Tomatoes showed a steady decline in price over the four weeks (Figure 5), reflecting their relatively high availability and good quality in the market (Figures 7 and 8).
- ▶ Potatoes exhibited somewhat more volatility, both rising and falling, consistent with the fluctuation in their availability and quality in the market.
- ▶ Onions follow an overall upward trend, with a sharp rise between Week 2 and Week 3.

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

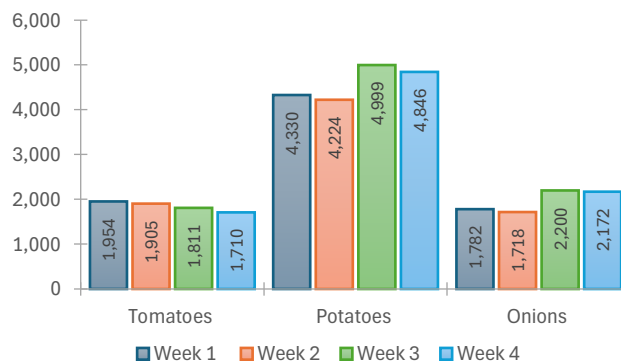
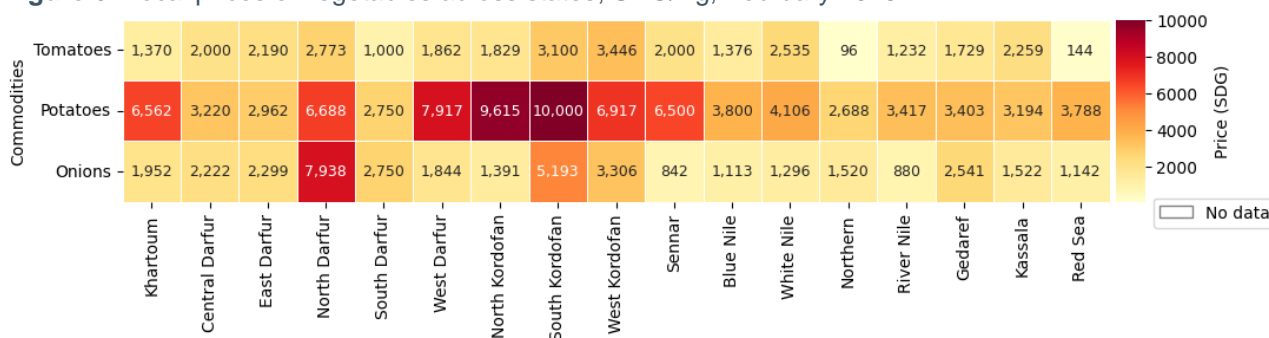


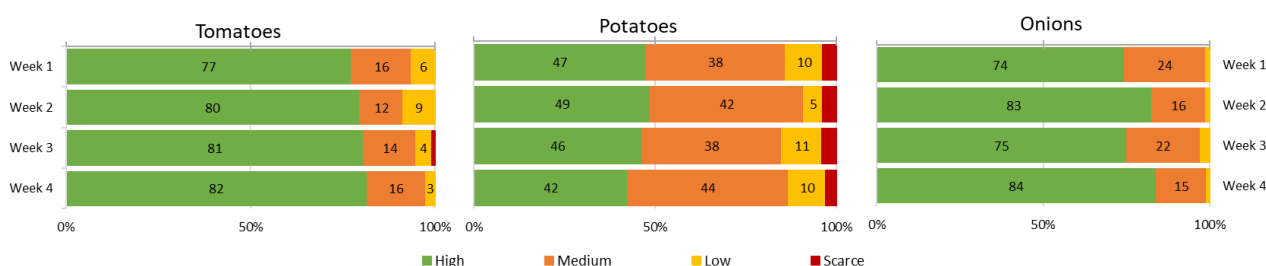
Figure 6 highlights stark differences in vegetable prices across states. Potatoes show the widest variation, ranging from around SDG 2,750 to over SDG 10,000, with particularly high prices in North and South Kordofan. Tomato prices are generally lower but highly uneven, with extremely low prices in Northern and Red Sea states and prices above SDG 3,000 in South and West Kordofan. Prices of onions are more stable, though North Darfur stands out with a sharp spike.

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



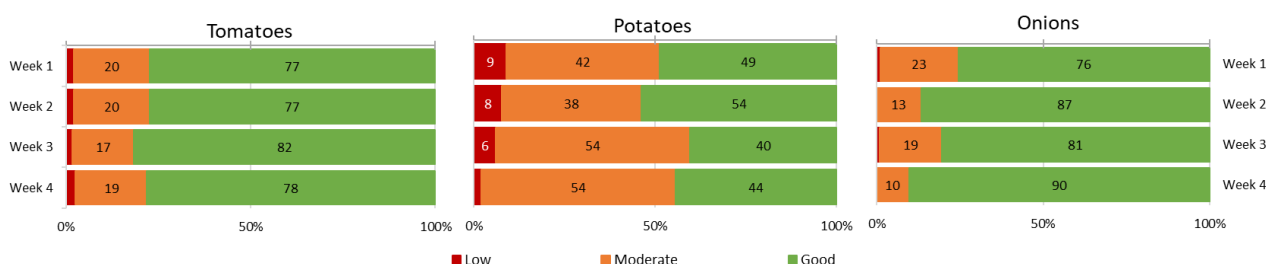
The availability of vegetables shows a heterogeneous pattern (Figure 7). While more than three-fourths of merchants perceived that tomatoes and onions are highly available over the four weeks, less than half of the merchants perceived this to be true for potatoes.

Figure 7: Vegetables availability scores, February 2025



The quality of onions, potatoes, and tomatoes showed noticeable improvements or remained relatively stable over the four weeks (Figure 8). The share of merchants who reported the availability of good-quality onions, potatoes, and tomatoes increased consistently. Potatoes, however, displayed more fluctuation in quality.

Figure 8: Vegetables quality scores, February 2025



Meat and Animal Products

- ▶ Lamb meat prices showed a gradual decline over the four weeks.
- ▶ Chicken and beef meat prices remained stable with only slight fluctuations.
- ▶ Fish prices declined over the four-week period (Panel A of Figure 9).
- ▶ Milk prices were variable across the month, first dropping and then recovering, while eggs prices increased steadily over the month by almost one quarter (Panel B of Figure 9).

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

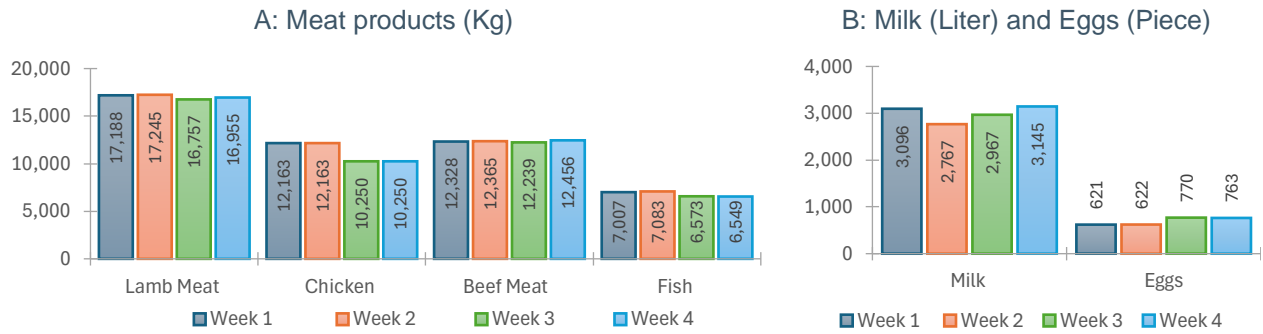
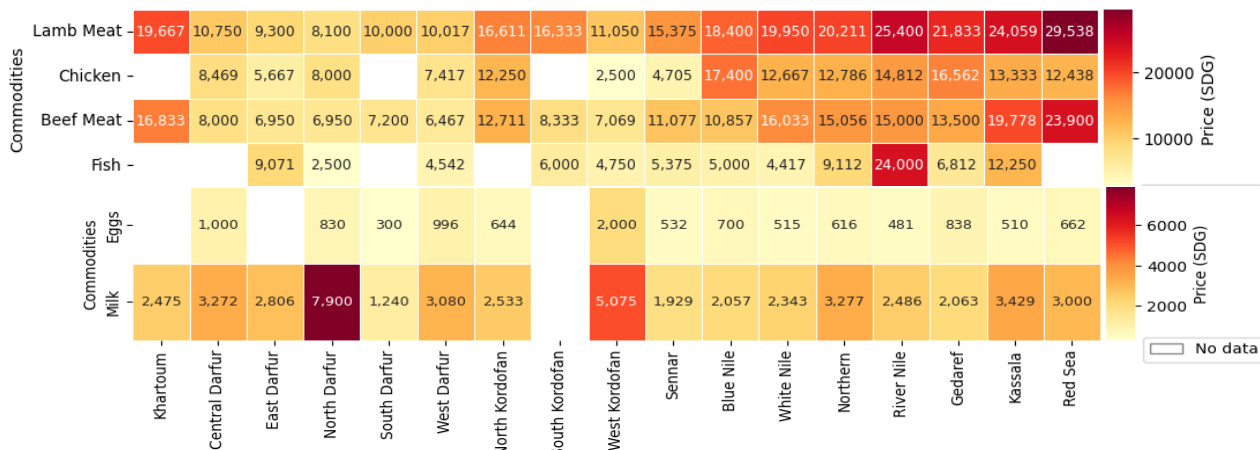


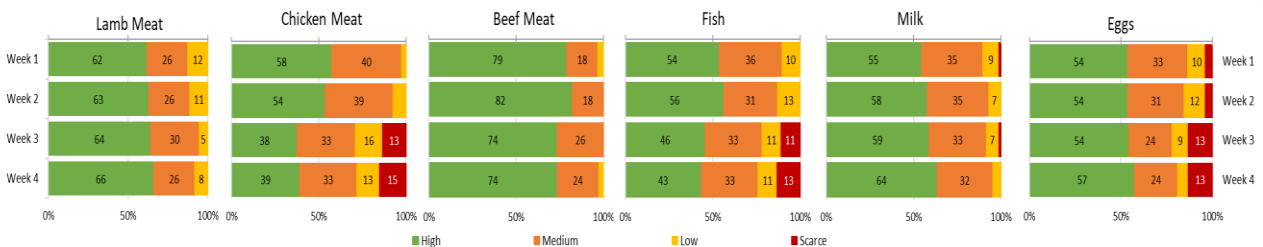
Figure 10 shows lamb meat consistently registers the highest prices among other meat products, peaking above SDG 29,000 in the Red Sea, with significantly lower values in states like East Darfur and North Darfur. Beef and chicken follow similar patterns. Fish prices vary sharply, spiking in the River Nile, indicating localized supply and access issues. Eggs and milk - generally more affordable - still show notable variability.

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



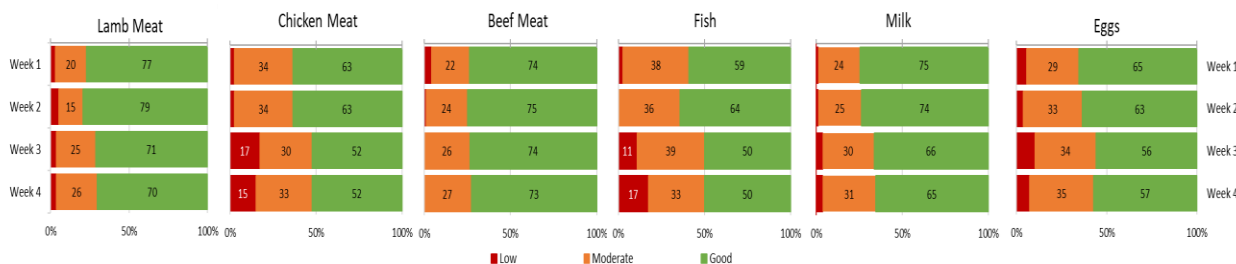
The perception of merchants regarding the availability of meat and animal products also varies by meat type. Most merchants perceived that beef and lamb meat were highly available in the market. However, the share of merchants who perceived scarce availability of chicken meat (13–15%), eggs (4–13%), and fish (11–13%) showed a substantial rise (Figure 11).

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



Overall, the share of merchants who reported good quality of meat and animal products is substantially high (Figure 12), apart from eggs and fish which show an upward trend in the availability low of quality.

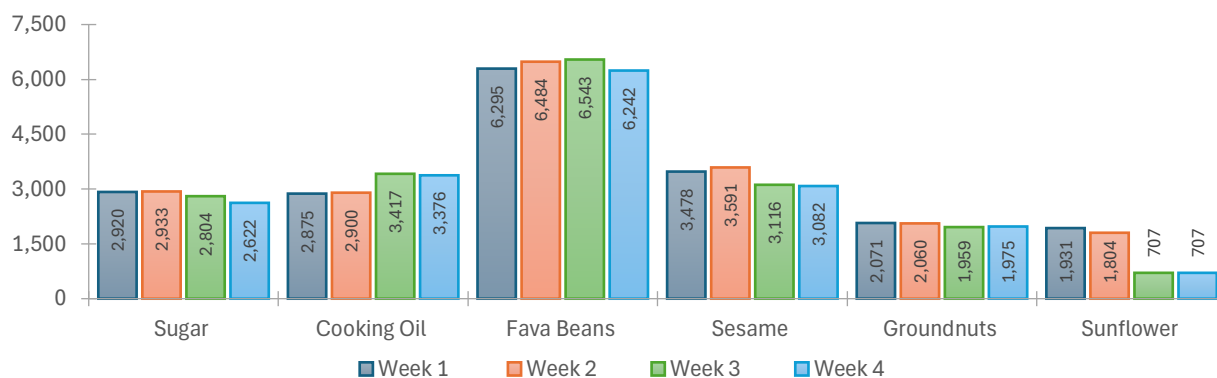
Figure 12: Meat and animal products quality scores, February 2025



Oilseeds, Cooking Oils, Sugar and Fava Beans

- ▶ Cooking oils prices rose steadily, before a slight drop in Week 4, despite their high availability and of relatively high quality (Figures 14 and 15).
- ▶ Sesame prices peaked in Week 2 but then dropped significantly.
- ▶ Groundnut prices declined gradually and remained relatively flat.
- ▶ Sunflower prices dropped sharply and then remained unchanged.
- ▶ Sugar prices remained relatively stable, while fava bean prices were stable with only slight variation.

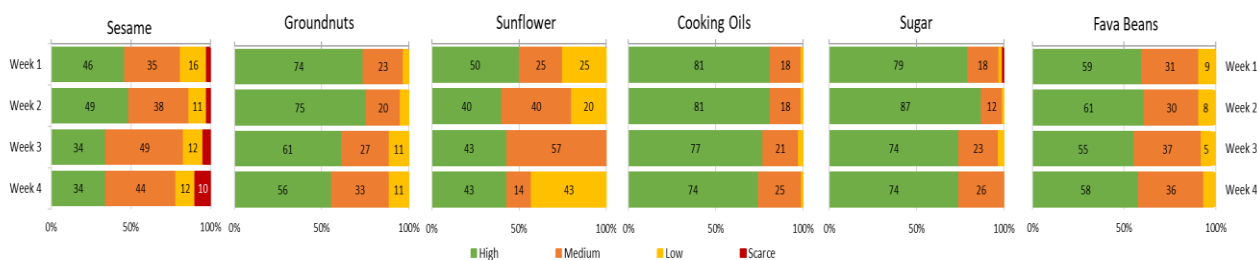
Figure 13: Local prices (SDGs) of oilseed (Kg), cooking oils (Liter), sugar (Kg) and fava beans (Kg), February 2025



On average, about three-fourths of merchants reported high availability of sugar and cooking oil, though this share declined over the four-week period.

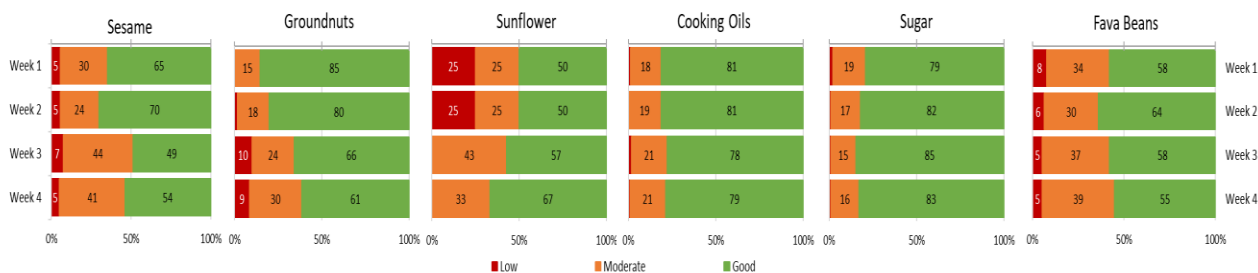
The availability of fava beans, sesame, groundnuts, and sunflowers showed a different pattern. Fava beans maintained a stable high availability (Figure 14). However, the availability of groundnuts declined over time. The low availability of sesame remained steady. On the other hand, the share of merchants who reported low availability of sunflower remained substantial (25–42%).

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



The perceived quality of all oilseeds increased over the four weeks. For groundnut, low-quality groundnut increased throughout the month, while for sunflower, no low-quality produce was reported by the end of the month (Figure 15).

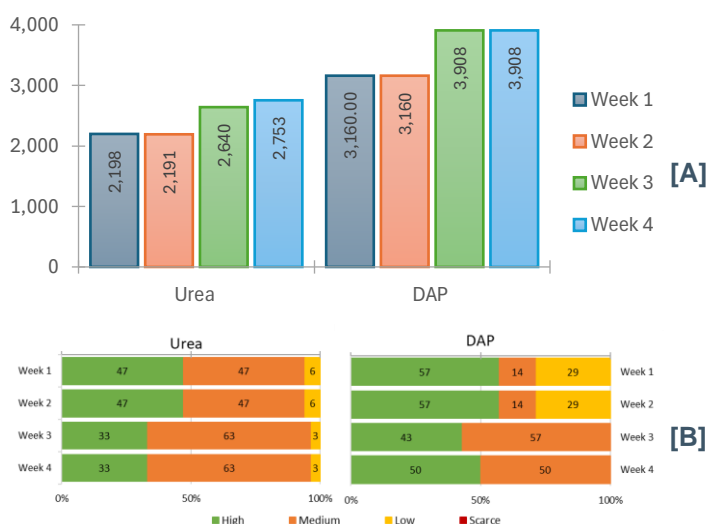
Figure 15: Oilseeds, cooking oils, sugar and fava beans quality scores, February 2025



Fertilizers

- ▶ Both urea and DAP prices surged during February, both by about 25 percent (Panel A of Figure 16).
- ▶ The availability of both agricultural inputs remained stable throughout the four weeks of February.
- ▶ Most merchants reported high or medium availability of the two agricultural inputs (Panel B of Figure 16).
- ▶ However, somewhat better availability of DAP emerged over the month compared to urea (Panel B of Figure 16).

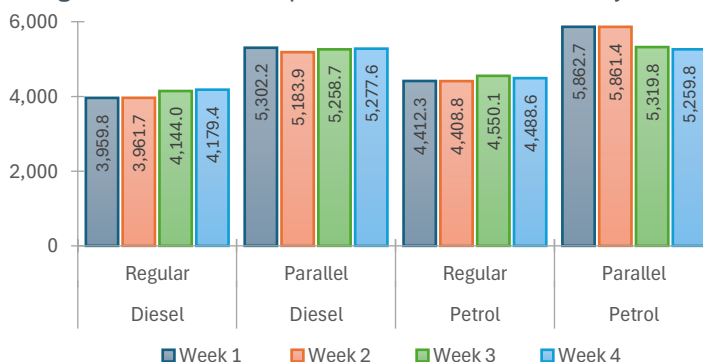
Figure 16: Local fertilizer prices (SDG/Kg) - Panel [A] and availability scores - Panel [B], February 2025



Diesel and Petrol

- ▶ The parallel market price for diesel is consistently higher than the official (regular) price by about one-third (Figure 17).
- ▶ The parallel market petrol prices are consistently higher than the official prices, like diesel.
- ▶ However, unlike diesel, the price difference between parallel and official petrol remains stable.

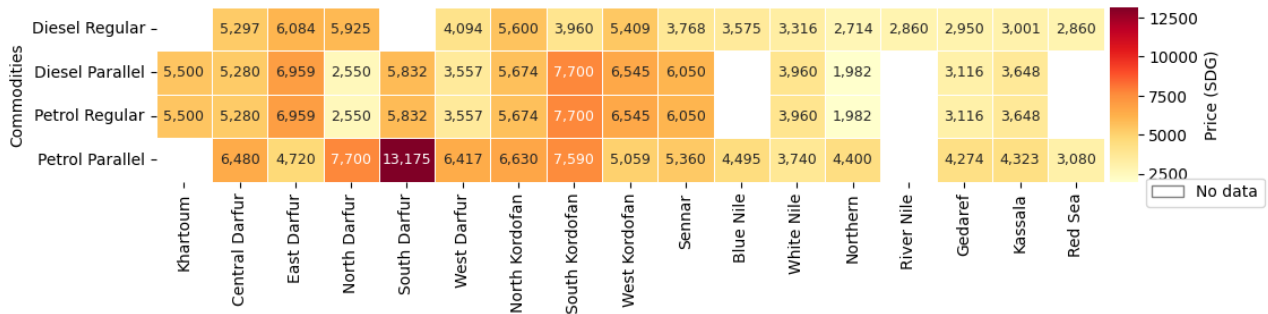
Figure 17: Local fuel prices, SDGs/Liter, February 2025



Petrol and diesel prices are consistently higher on the black market than in the regular market, with South Darfur recording the sharpest spike. Prices are significantly lower in northern and eastern states. Across most states, black market prices exceed regular prices by between 20 and 50 percent,

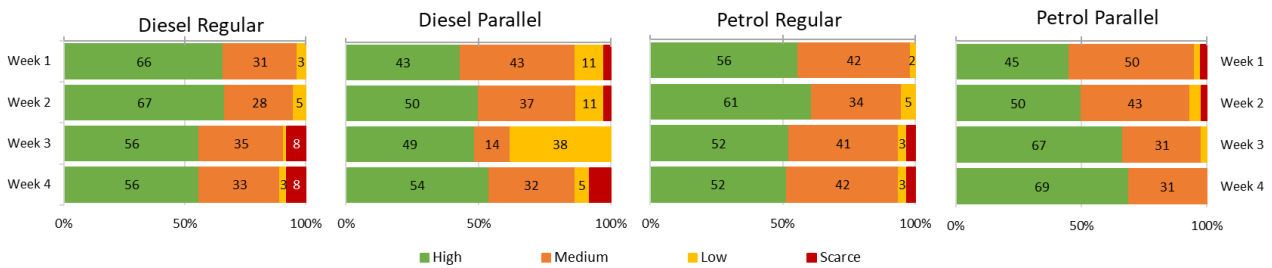
particularly for petrol. Sennar, Northern, and White Nile exhibit relatively stable and lower fuel costs (Figure 18).

Figure 18: Fuel prices across states, SDGs/Liter, February 2025



The availability of diesel and petrol showed variation across regular and parallel sources over the four weeks. On average, more than half of the merchants reported high availability of diesel in the regular market. The share of merchants reporting high availability of Petrol substantially increased over the month (Figure 19).

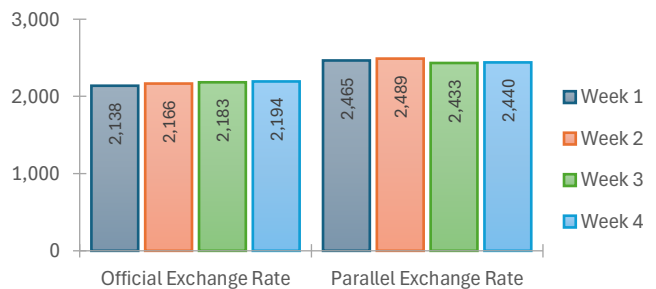
Figure 19: Fuel availability scores, February 2025



Exchange Rates

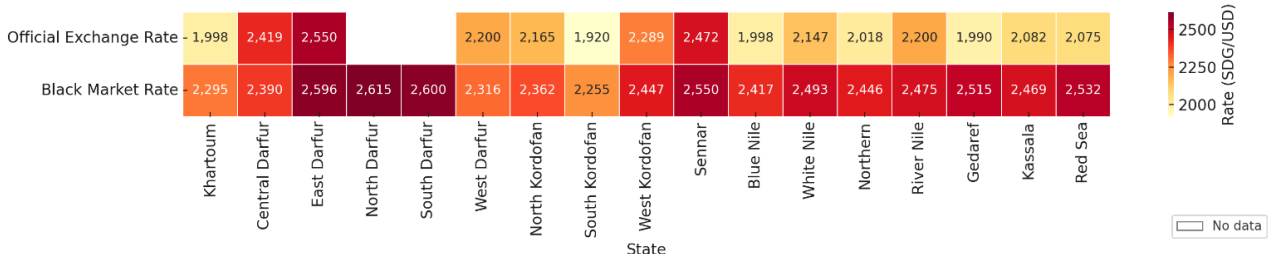
- Exchange rates showed minimal movement during the month, with the official rate appreciating slightly and the parallel market rate declining slightly (Figure 20).
- The gap between the official and parallel rates remained wide, averaging around 12.5%.

Figure 20: Exchange Rate, SDG/US Dollar, February 2025



While the official rate varies modestly (from SDG 1,920 to 2,550 per USD), the parallel market rate is consistently higher, reaching over SDG 2,600 in North and South Darfur. The smallest gaps between rates are observed in more stable regions (Figure 21).

Figure 21: Units of SDGs to one US dollar exchange rates across states, February 2025



Market Actors' Perception

The perceptions of merchants in markets across Sudan's 18 states reveal a complex environment shaped by both challenges and opportunities during the violent conflict that erupted in April 2023. Although the qualitative findings presented here reflect conditions in February 2025, the prolonged impact of nearly two years of conflict remains deeply felt.

Merchants across the country have identified several overarching challenges affecting the trade of key commodities, both inter- and intra-state:

- ▶ Road blockages and high transportation costs hinder the efficient movement of goods,
- ▶ Limited availability and accessibility of commodities from various regions reduce supply options, and
- ▶ Overall reduced consumer income levels have dampened demand and purchasing power.

While merchants report broadly similar challenges and opportunities, notable regional disparities remain—largely shaped by differences in conflict intensity and governance structures.

The ongoing SAF-RSF conflict has significantly altered market dynamics across Sudan, with varied effects depending on location and conflict intensity:

- ▶ In conflict-affected areas such as Khartoum, Darfur, and Kordofan, merchants face:
 - ▷ High risks of looting and violence,
 - ▷ Checkpoint fees and restricted trade routes, and
 - ▷ Commodity shortages and declining purchasing power.
- ▶ In relatively safe states like Kassala, Gedaref, and River Nile, merchants benefit from increased demand driven by IDP inflows, but also face challenges including high transport costs, limited storage, and commodity spoilage.

Despite constraints, some merchants in stable areas have stockpiled goods in anticipation of market fluctuations, expanded trade into rural areas, and stored goods privately to minimize risks.

Merchant profitability is highly dependent on local security and operating conditions:

- ▶ Those in high-risk areas report low or negative margins due to theft, instability, and rising logistics costs.
- ▶ Merchants in more stable regions generally earn higher profits, though still affected by fuel prices and rental costs.

Governance and regulation enforcement is also uneven:

- ▶ In SAF-controlled or low-conflict areas, federal trade regulations are largely upheld.
- ▶ In high-conflict zones, merchants operate under informal systems, often paying unofficial fees to non-state actors.

This fragmentation has contributed to significant regional disparities in market functioning, access, and profitability across Sudan.

Conclusions

The market continues to experience considerable volatility, with noticeable fluctuations in food prices, exchange rates, and fuel costs. Cereal prices increased significantly, potentially exacerbating food security concerns. On the other hand, meat and dairy prices remain stable. Vegetable prices also displayed varied trends, with some commodities declining while others increasing. Fuel price fluctuations highlight persistent market challenges, particularly in the parallel market, which remain significantly more expensive than formal channels. The divergence between official and parallel exchange rates, along with substantial regional price disparities, underscores ongoing economic distortions. These trends emphasize the need for continuous monitoring and strategic interventions to mitigate inflationary pressures and ensure market stability.

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