

Essential Commodities Prices, Availability, and Market Actors' Perceptions

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Summary

This report presents an overview of trends in prices, availability, and quality of key commodities in Sudan during February, March, and April 2025. It covers cereals, vegetables, animal products, and essential goods such as cooking oil, sugar, agricultural inputs (fertilizers and seeds), fuels, and exchange rates. The analysis reveals notable spatial and temporal disparities in prices, availability, and quality across Sudan's 18 states.

Cereal prices showed mixed patterns: wheat prices rose from February to March before declining in April, while sorghum and millet prices fluctuated. Wheat flour prices remained relatively stable. Spatial disparities were particularly evident for wheat and wheat flour. Traders consistently reported stable availability and quality for most cereals. Vegetable prices varied significantly. Tomato prices remained stable, potato prices were consistently higher than other vegetables, and onion prices declined steadily before rising slightly at the end of April. Spatial and temporal differences in prices were also prominent.

Meat prices continued to increase steadily, while fish prices fluctuated in line with availability. Egg prices rose gradually, while milk prices, after some initial fluctuations, declined steadily in March and April. Among agricultural inputs, wheat seed prices remained stable, whereas local sorghum seed prices rose consistently. Fertilizer prices fluctuated: urea prices experienced a modest increase followed by a decline, while DAP prices rose sharply in April. Fuel prices demonstrated both temporal and spatial variability. Prices were notably higher in the parallel market, while diesel and petrol prices in the regular market were more stable, though regional differences persisted. Finally, the exchange rate analysis showed a continued premium in the parallel market, underscoring persistent foreign currency supply constraints.

Cereals and Flour

Wheat prices rose modestly from February to March before declining noticeably in April, reflecting improved availability in March followed by reduced supply in April. Sorghum and millet prices exhibited fluctuations, both increasing in March and falling in April. In contrast, wheat flour prices remained relatively stable throughout the three-month period, showing only minor week-to-week variations. These trends suggest differentiated supply dynamics across cereal types, with wheat flour markets appearing more insulated from short-term shocks than raw grain markets.

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

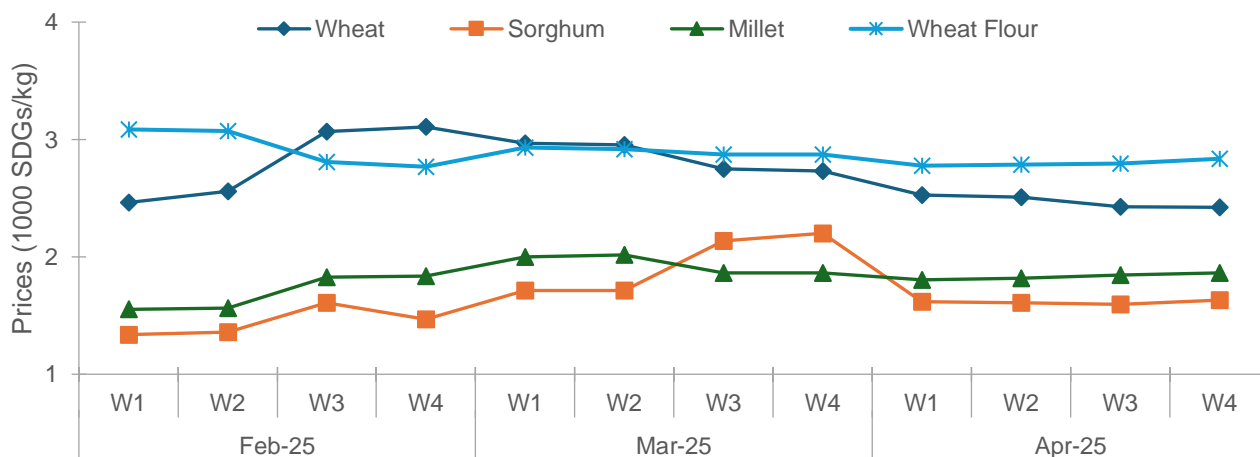


Figure 2 shows wide regional differences in cereal prices. Wheat prices vary most significantly, with the highest recorded in Central Darfur and the lowest in Red Sea, indicating strong regional supply constraints. Wheat flour also displays substantial spatial variation, with particularly high prices in South Darfur and West Darfur. In contrast, sorghum and millet prices remain relatively stable across both space and time, suggesting more consistent supply chains and market integration for these staples.

Figure 2: Local monthly average prices of cereals across states, 1000 SDG/Kg, February - April 2025

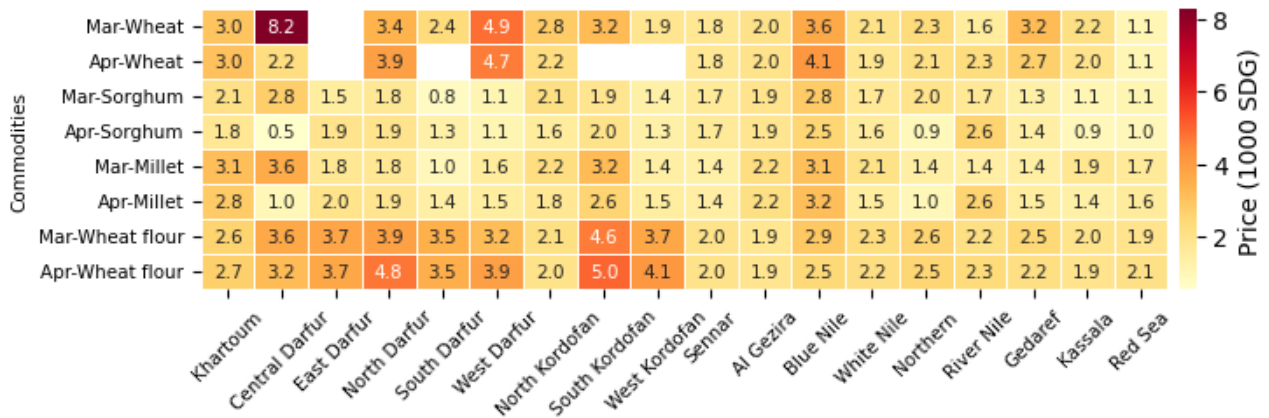


Figure 3 shows stable wheat availability, though around 16% of traders reported low availability in both February and April. Sorghum availability declined steadily, with high availability falling from 71% to 57%. Millet remained consistently available at medium to high levels. Wheat flour was the most available cereal overall but showed a drop in high availability from 75% in February to 66% in April, indicating growing supply pressures.

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

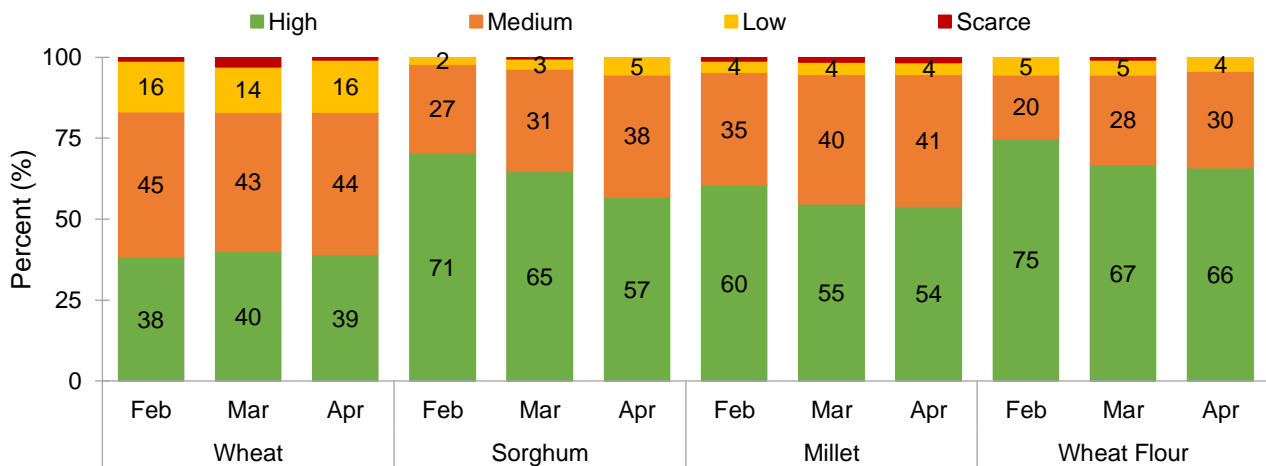
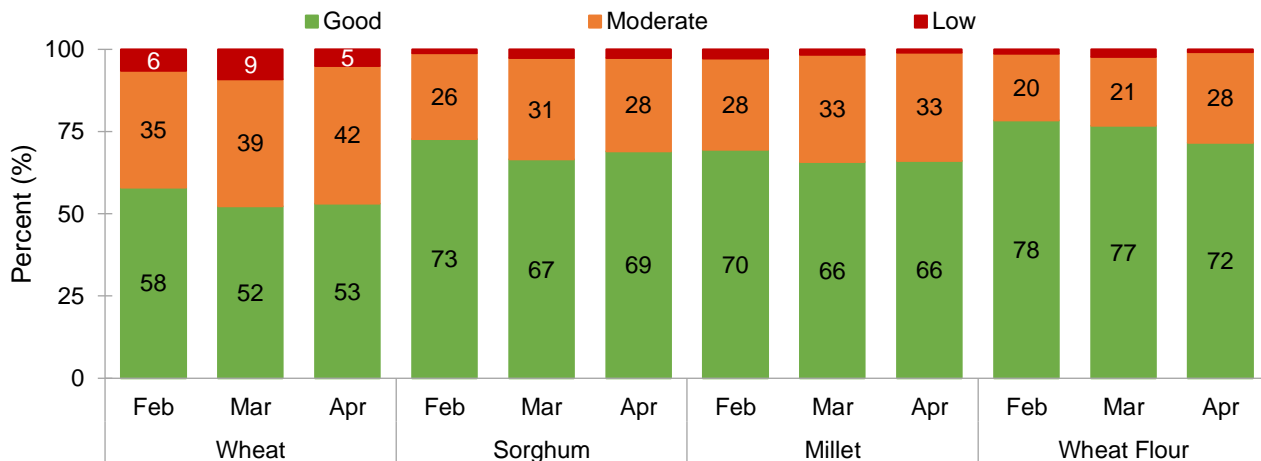


Figure 4 shows consistently high perceived quality for cereals and wheat flour. Most traders rated quality as good or moderate, with only minor reports of low quality. Wheat showed slight declines in good ratings over time, while sorghum, millet, and wheat flour maintained strong quality perceptions, with over two-thirds of traders rating them as good throughout the period.

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



Vegetables

Figure 5 shows stable tomato prices throughout the period, reflecting consistent supply. Potato prices peaked in late February, then gradually declined, likely due to improved availability. Onion prices trended downward until mid-April, followed by a slight rebound. Compared to cereals, vegetable prices were generally more stable with fewer sharp fluctuations.

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

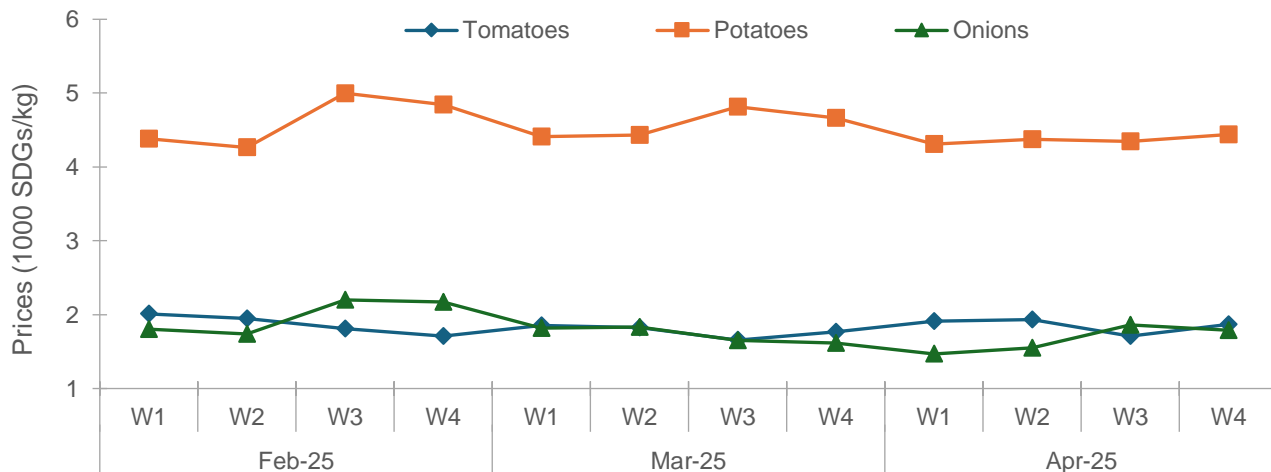


Figure 6 shows significant regional and temporal variation in vegetable prices. Tomato prices vary widely, with the highest prices in West and South Kordofan, over four times higher than the lowest recorded. Potato prices are highest in Sennar and parts of Darfur, showing sharp regional disparities. Onion prices are more stable but still vary across states, with peaks in West Darfur and North Kordofan. These trends reflect uneven supply and distribution across regions.

Figure 5: Local monthly average prices of vegetables across states, 1000 SDG/Kg, February - April 2025

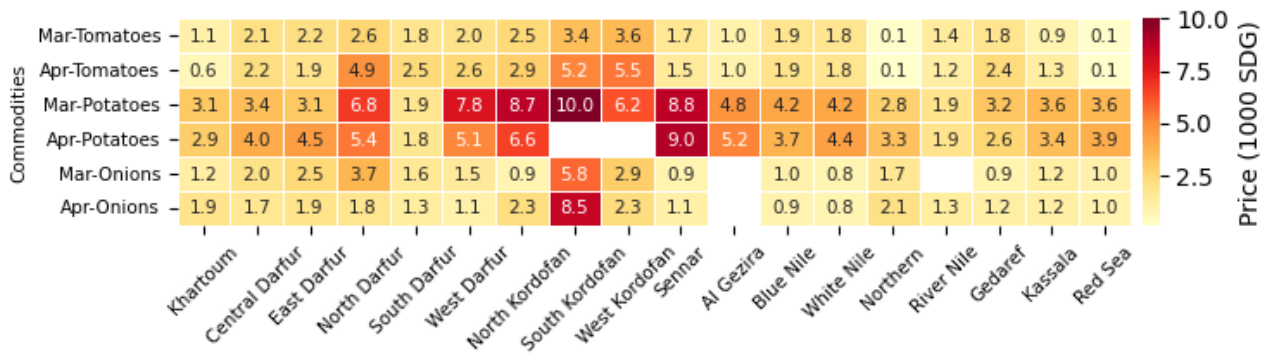


Figure 7 shows a decline in the high availability of tomatoes, with more traders reporting medium level suggesting moderate supply conditions. Potato availability remained relatively stable over time. Onion availability stayed high but slightly decreased from February to April.

Figure 6: Vegetables availability scores, February - April 2025

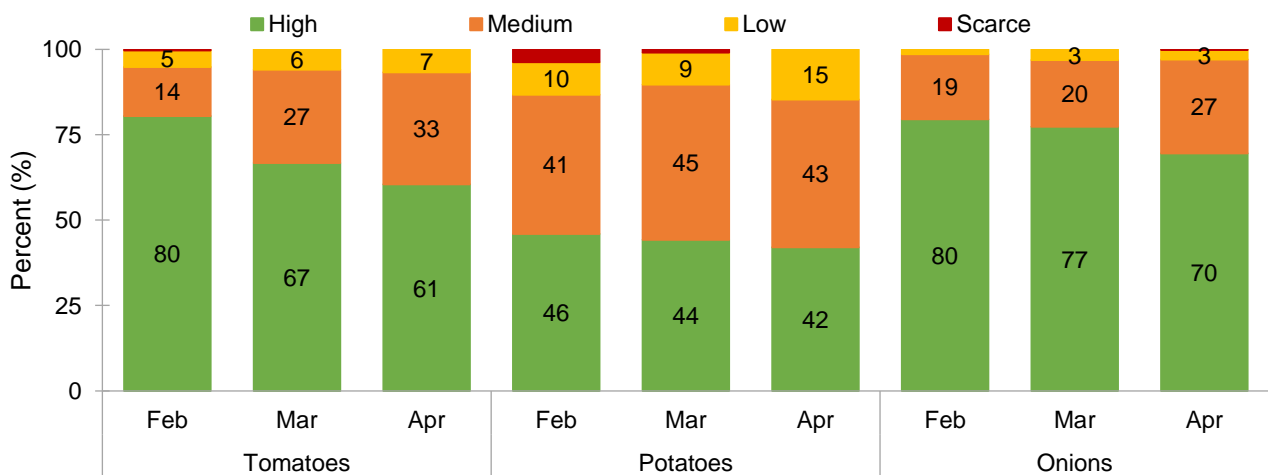
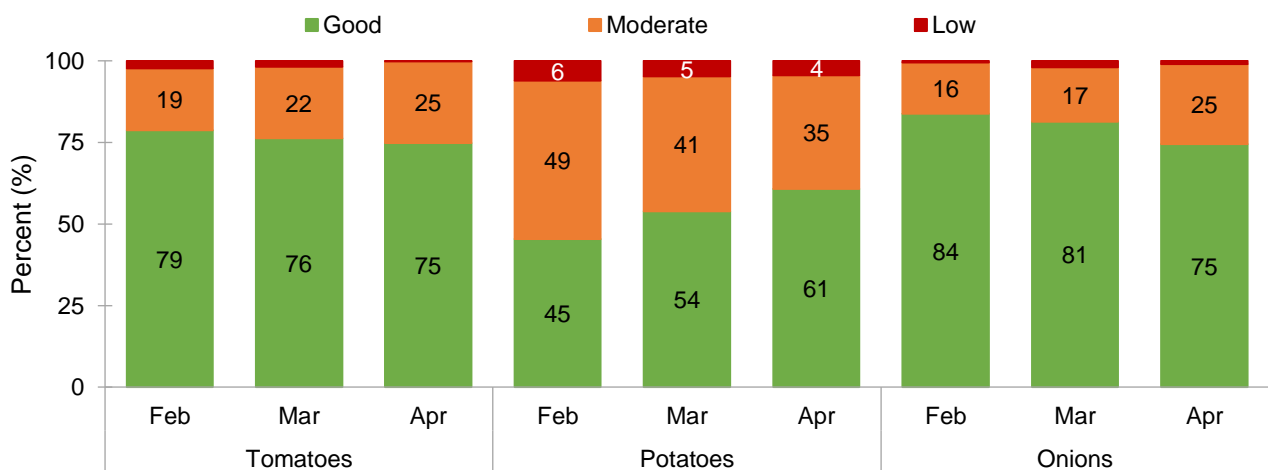


Figure 8 shows stable quality perceptions for tomatoes and onions, with most traders reporting good or moderate quality. Potato quality improved over time, with a growing share of traders rating it as good.

Figure 7: Vegetables quality scores, February - April 2025



Meat and Animal Products

Figure 9 shows steady price increases for lamb, chicken, and beef from February to April, likely driven by slight drops in availability and quality (see Figures 11 and 12). Fish prices fluctuated, reflecting a variable supply. Egg prices rose gradually, while milk prices declined consistently over the three-month period.

Figure 8: Local prices in SDGs of meat and animal products, weekly average, February- April 2025

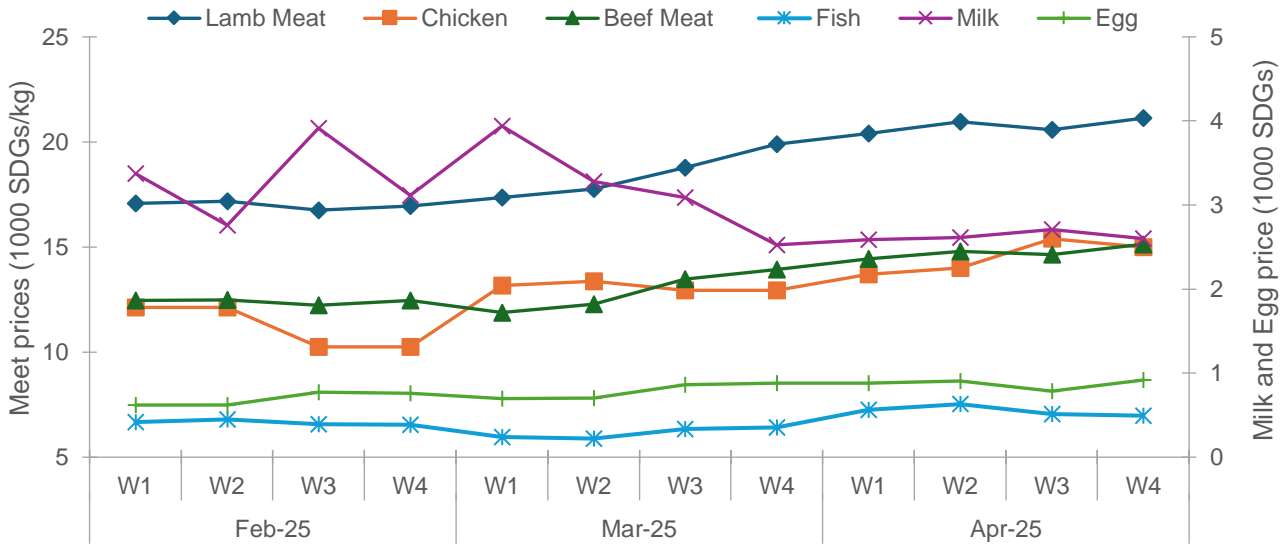


Figure 10 highlights sharp regional and temporal disparities in meat prices. Lamb and chicken prices vary significantly, with the highest prices nearly three times the lowest, and notable increases in several states over time. Beef prices show moderate spatial variation but are more stable overall. Fish prices are consistent across states, with limited changes over time. Egg prices show the least variation, while milk prices remain stable over time but differ across regions.

Figure 9: Local prices of meat and animal products across states (1000 SDGs), February - March 2025

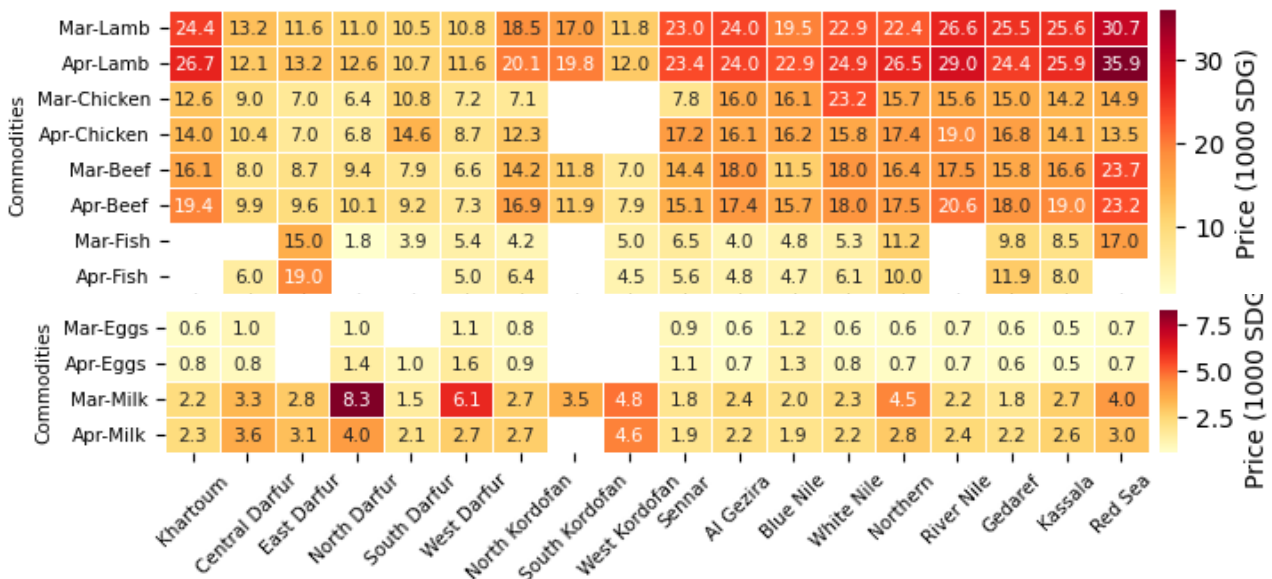


Figure 11 shows a decline in the availability of lamb, chicken, and beef, with chicken seeing the sharpest drop and rising reports of low and scarce supply. Fish availability shifted from high to more

moderate levels. Milk availability remained stable, while egg availability declined, with low availability reports doubling by April.

Figure 10: Meat and animal products availability scores, February - April 2025

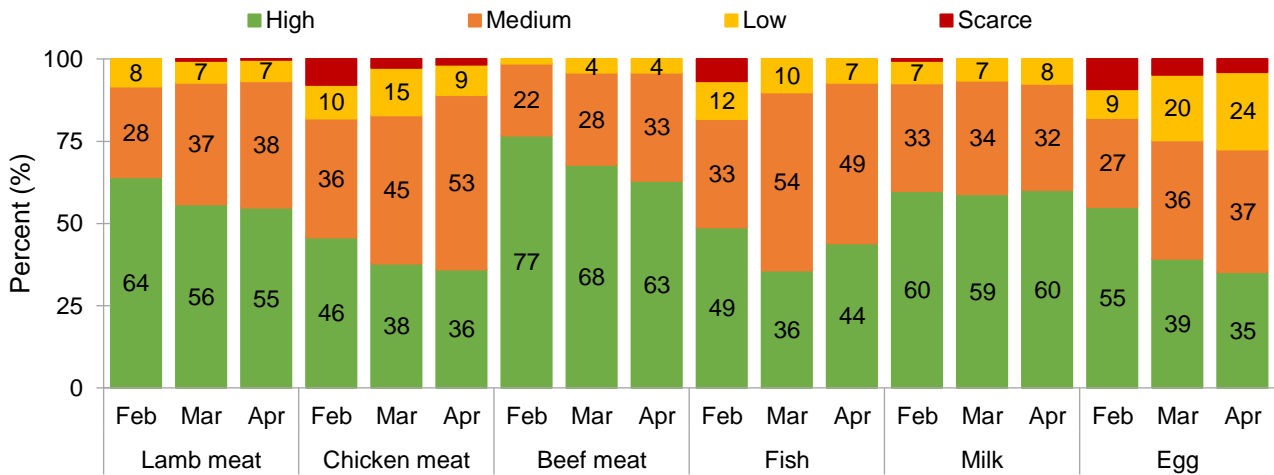
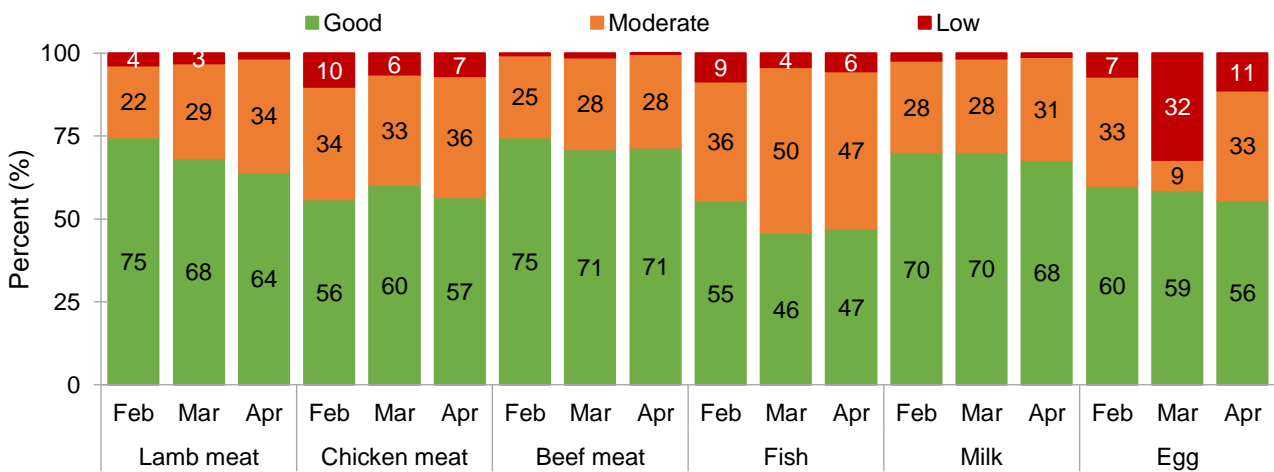


Figure 12 shows a gradual decline in reported good quality for lamb meat, while beef quality remained relatively stable. Milk consistently received high to moderate quality ratings. Egg quality dropped noticeably in March and April, with a sharp rise in reports of low quality, contrasting with the general stability observed in other products.

Figure 11: Meat and animal products quality scores, February - April 2025



Oilseeds, Cooking Oils, Sugar, and Fava Beans

Figure 13 shows that sugar and cooking oil prices remained stable, supported by high availability and quality (see Figures 15 and 16). Prices for fava beans, sesame, and groundnuts declined slightly over time. Sunflower prices were more volatile, driven by limited availability and lower reported quality.

Figure 12: Local prices (1000 SDGs) of oilseed (Kg), cooking oils (Liter), sugar (Kg) and fava beans (Kg), February - April 2025

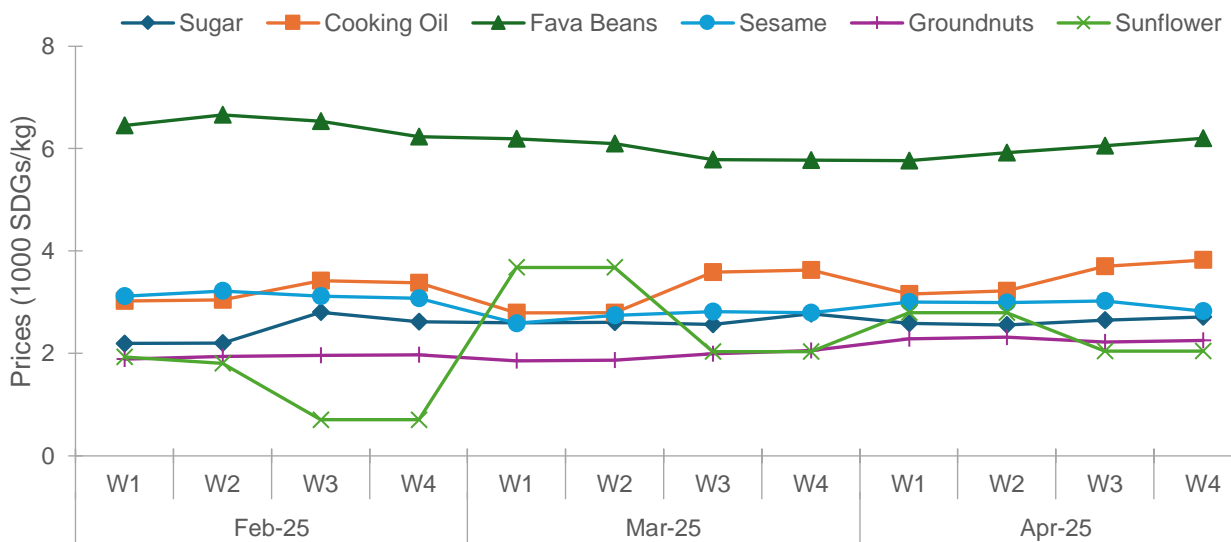


Figure 14 highlights wide price disparities across states. Cooking oil and sunflower prices are highly variable, with peaks in states like West Kordofan. Prices of sesame, fava beans, and groundnuts also show significant spatial variation. In contrast, sugar prices are more stable across both space and time.

Figure 13: Oilseeds, cooking oils, sugar and fava beans prices (1000 SDGs) across states, February - April 2025

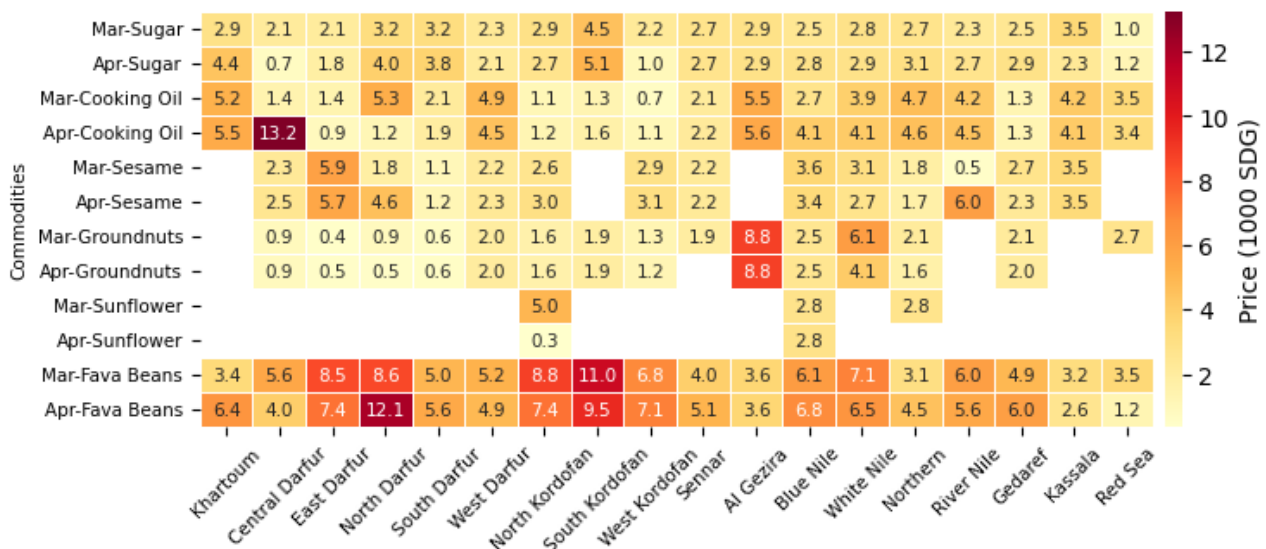


Figure 15 shows that sugar and cooking oil had consistently high to medium availability, indicating stable supply. Fava beans and sesame also maintained good availability, despite the brief supply dips. Groundnut availability improved over time. Sunflower oil faced the most supply challenges, with low high-availability scores and persistent reports of scarcity.

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

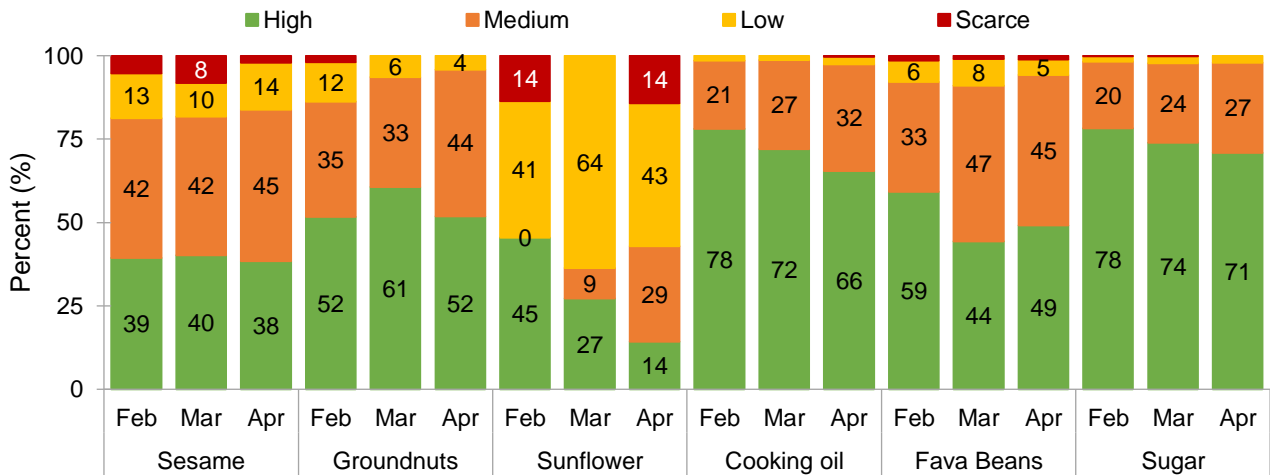
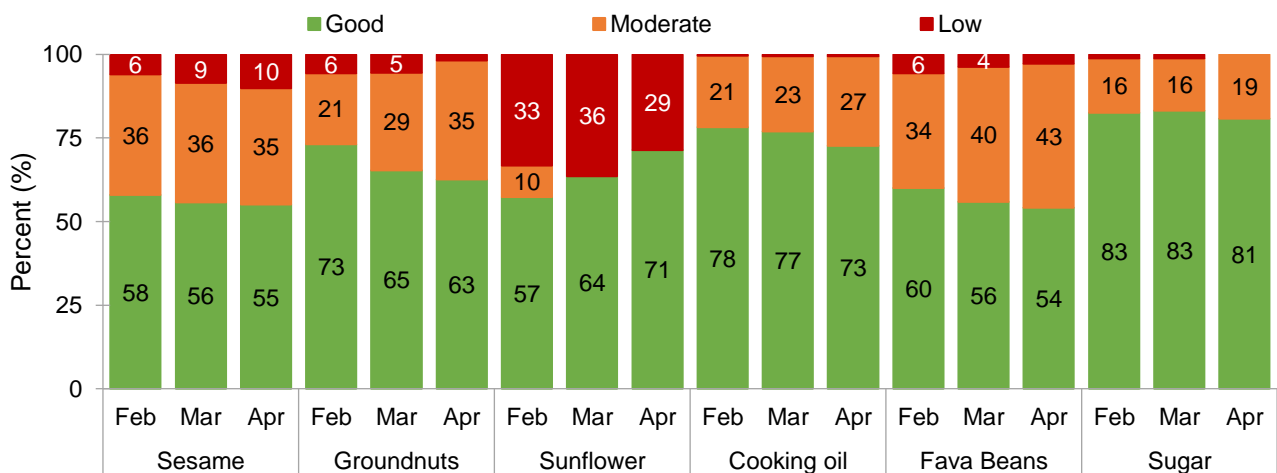


Figure 16 shows stable quality perceptions for fava beans, sesame, and groundnuts, with most traders reporting good to moderate quality. Sunflower quality declined, with low-quality reports peaking in March. Sugar and cooking oil maintained consistently high quality throughout the period.

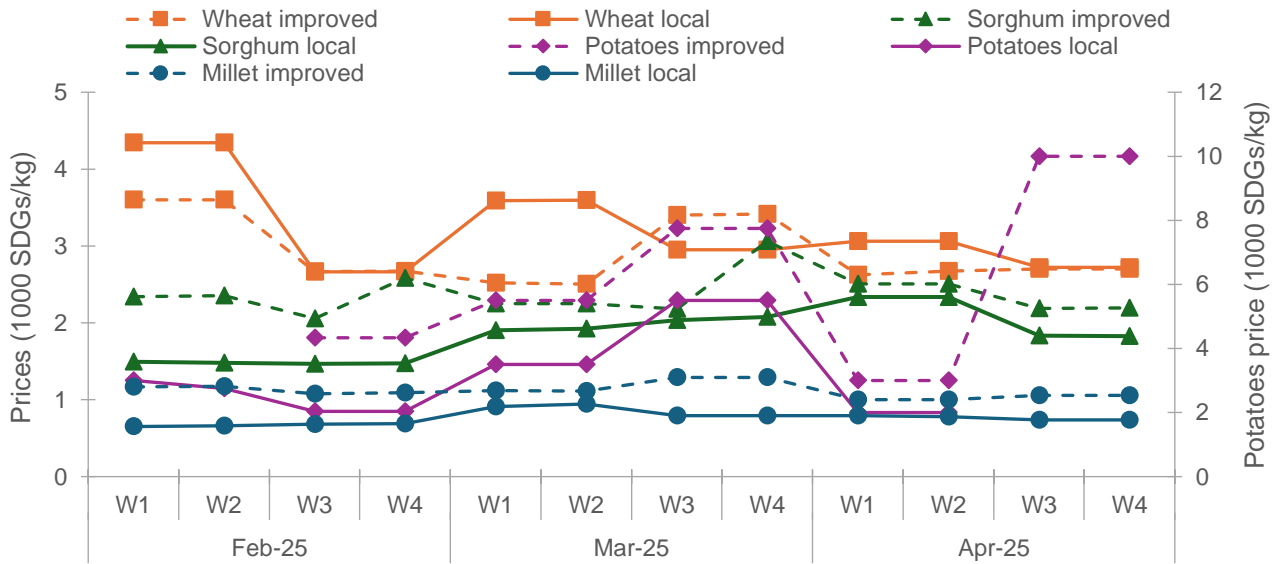
Figure 15: Oilseeds, cooking oils, sugar and fava beans quality scores, February - April 2025



Improved and Local Seeds

Figure 17 shows stable prices for both improved and local wheat seeds. Improved sorghum seed prices remained flat, while local sorghum seed prices rose steadily. Improved potato seed prices peaked in March, while local potato seed prices spiked in March and dropped sharply in April. Millet seed prices were mostly stable, with local millet showing a mild rise in March and a slight drop in April.

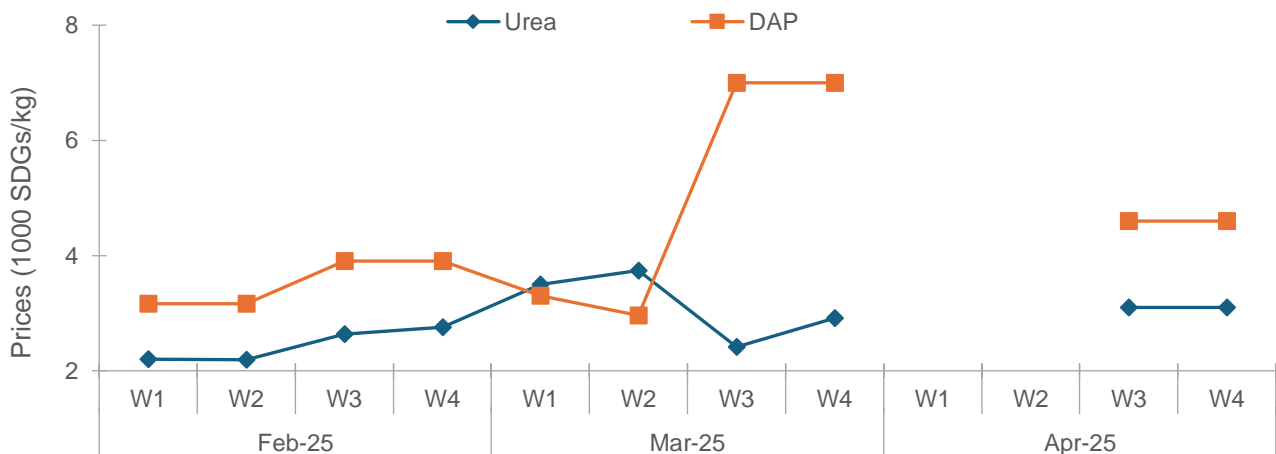
Figure 17: Local seeds prices (1000 SDG/Kg), monthly average, February - April 2025



Fertilizers

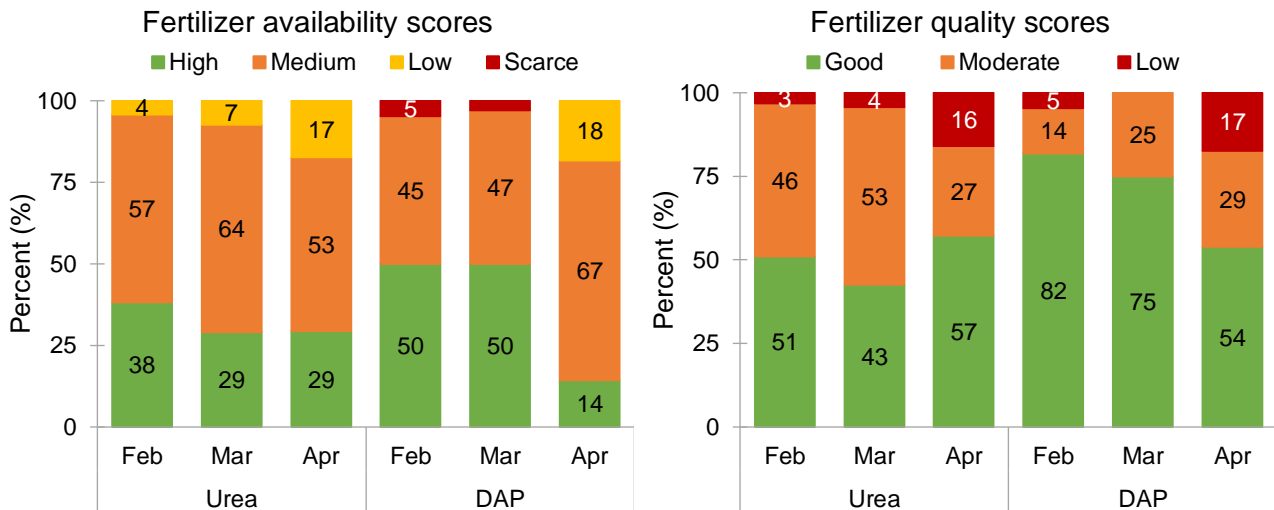
Figure 18 shows moderate price fluctuations for Urea and DAP. Urea prices rose from February to March, then declined in April. DAP prices dropped slightly before surging sharply in late March and early April. These trends align with reported changes in availability and quality (Figures 19 and 20)

Figure 18: Local fertilizer prices (SDG/Kg), weekly average, February - April 2025



Availability of both Urea and DAP declined sharply by April. High availability of urea dropped from 38% in February to just 29%, while DAP's high availability fell from 50% to 14%, with a corresponding rise in low and scarce availability. Quality perceptions also worsened. Reports of low-quality urea rose significantly, from 3% in February to 16% in April. Similarly, the share of traders rating DAP quality as low increased from 5% to 17%, alongside a decline in good-quality ratings

Figure 19: Fertilizer availability and quality scores, February - April 2025



Diesel and Petrol

Figure 20 shows that diesel prices in both regular and parallel markets remained stable over the period. Regular petrol prices dropped from March to April, then leveled off. Parallel market petrol prices fluctuated weekly but stayed relatively steady overall. Regular market prices remained consistently lower than those in the parallel market throughout.

Figure 20: Local fuel prices, SDGs/Liter, monthly average, February - April 2025

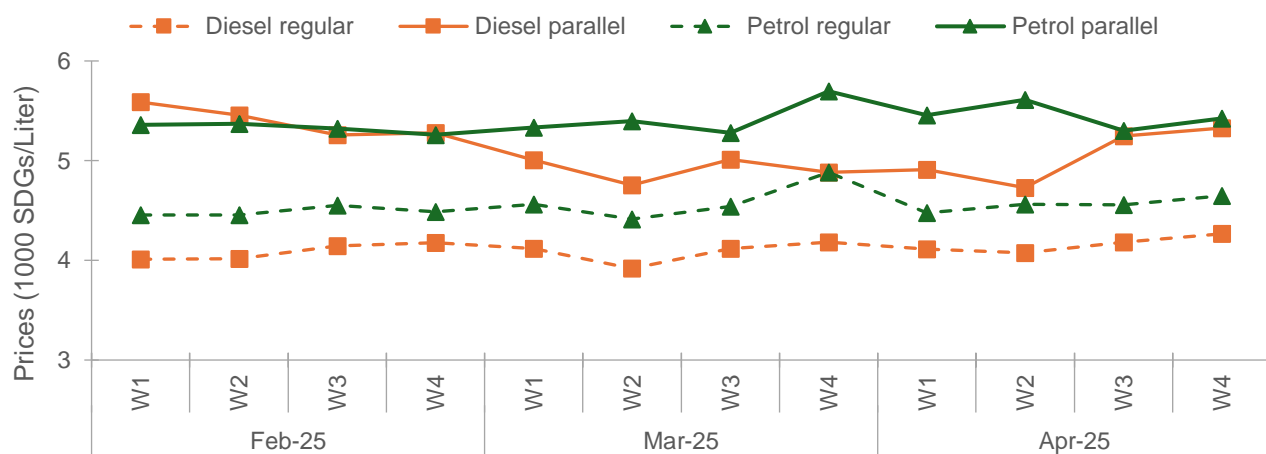


Figure 21 highlights significant regional variation in fuel prices. For regular diesel, the highest prices were recorded in West Kordofan, while the lowest were in Khartoum. Diesel prices in the parallel market showed even greater variation, with West Kordofan again among the highest and South Darfur among the lowest.

Regular petrol prices were highest in West Kordofan and lowest in Kassala and Red Sea. In the parallel market, petrol was most expensive in South Darfur and North Darfur, and lowest in East Darfur. These disparities reflect persistent regional differences in fuel access and market conditions.

Figure 21: Fuel prices across states, 1000 SDGs/Liter, February - March 2025

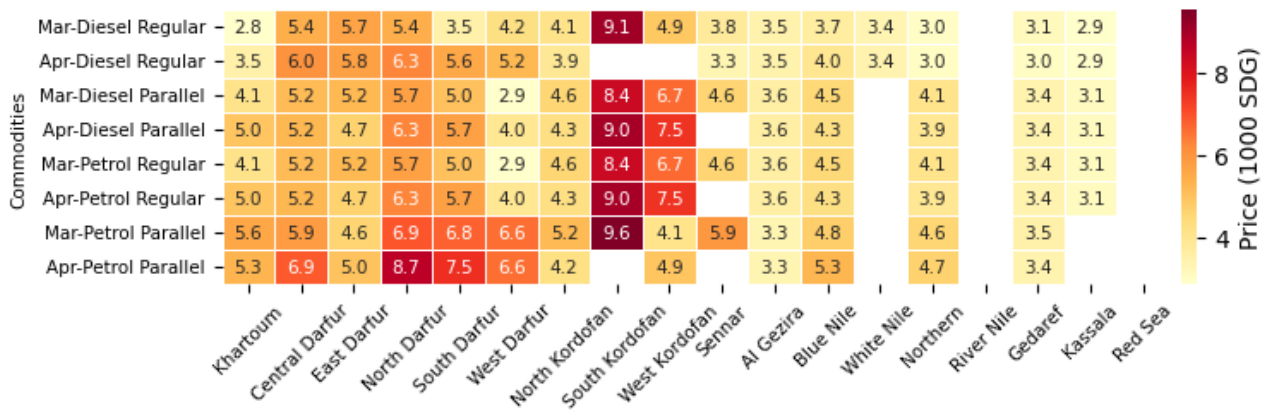
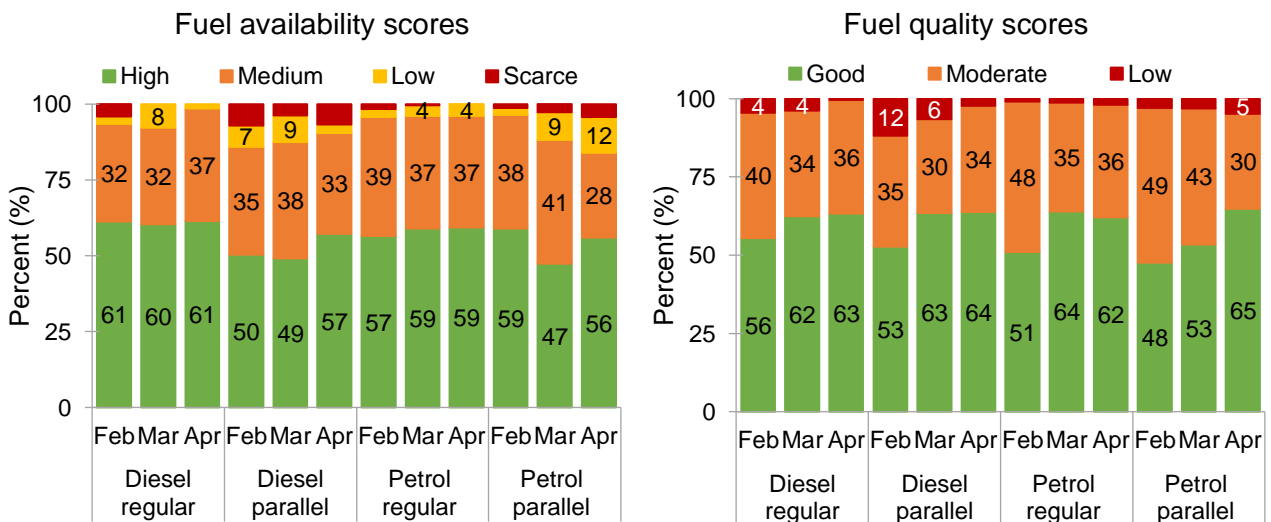


Figure 22 shows that regular market fuel availability remained mostly high to medium, with slight disruptions in March and April, especially for petrol. In the parallel market, availability was lower and declined further in April, with increased reports of low availability and scarcity, particularly for petrol.

Quality perceptions were more favorable in the regular market. However, in the parallel market, a notable share of traders reported low-quality diesel and petrol, especially in February and April. These trends highlight growing supply and quality concerns in informal fuel channels.

Figure 22: Fuel availability and quality scores, February - March 2025



Exchange Rates

Figure 23 shows that the parallel exchange rate remained consistently higher than the official rate throughout the period. The official rate rose gradually in February and early March, then leveled off with minor fluctuations in April. The parallel rate experienced slight week-to-week changes, peaking in early March before stabilizing around the 2,500 SDG/USD mark.

Figure 23: Exchange Rate, SDG/US Dollar, February - March 2025

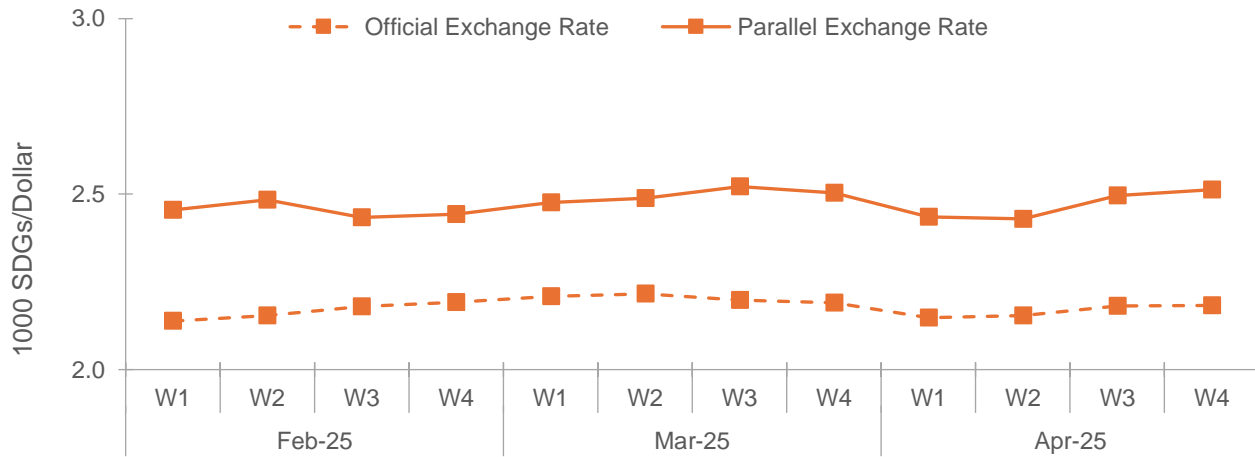
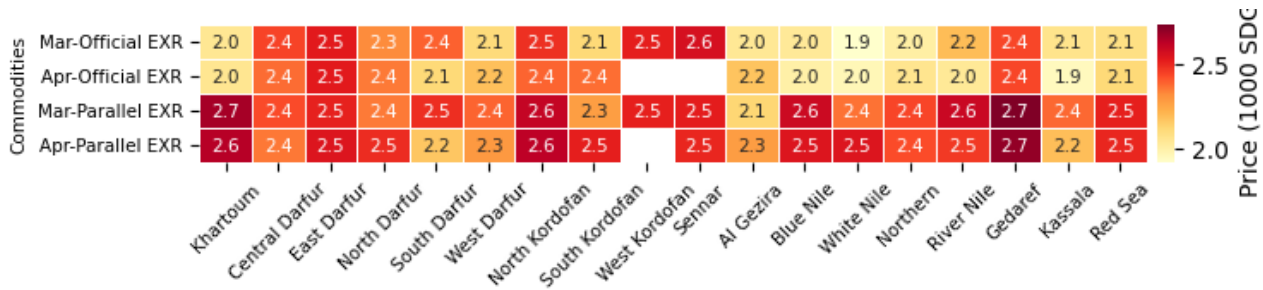


Figure 24 shows persistent spatial differences in exchange rates, with parallel market rates consistently higher than official rates in all states, highlighting continued reliance on informal channels due to limited foreign exchange supply. The highest parallel rates were reported in Khartoum, Gedaref, and North Kordofan, while lower rates appeared in South Darfur and Kassala. Several states saw rising parallel rates in April, indicating increasing pressure on the unofficial market.

Figure 24: Units of 1000 SDGs to one US dollar exchange rates across states, February - March 2025



Market Actors' Perception

Two years into the conflict that began in April 2023, market actors in 16 of Sudan's 18 states (excluding Khartoum and Al Jazirah) report continued disruption in trade, pricing, and supply chains. Rising prices, reduced purchasing power, and a shift toward staple commodities have been compounded by the collapse of regulation and oversight. Common challenges include:

- ▶ Declining demand for non-essential goods; increased reliance on staple foods.
- ▶ Absence of price regulation and consumer protection.
- ▶ Security risks such as looting and theft along trade routes and within markets.

In conflict-intense regions of Darfur and Kordofan merchants note:

- ▶ Supply is inconsistent, and transport costs are high.
- ▶ Traders face informal fees from non-state actors and rely on costly secure storage.
- ▶ Access to cash and mobile banking platforms like Bankak is limited.

In relatively safer regions like the Red Sea, Kassala, Gedaref, River Nile and Northern States, merchants note:

- ▶ Demand is lower due to the return of IDPs to urban areas.
- ▶ Price volatility persists without regulatory mechanisms.
- ▶ Heavy dependence on imports, amid liquidity constraints and high operating costs.

In addition to challenges faced, merchants have also identified opportunities in markets and inter- and intra-state trade, namely:

- ▶ Commodity diversification to meet essential needs.
- ▶ Market expansion into rural areas and cross-state collaboration.
- ▶ Emergence of new traders and access to cross-border trade, especially in West Darfur.
- ▶ Use of alternative storage outside main urban market.

Merchants' profitability continues to be contingent on three key factors: demand for commodities, trade routes and access to commodities, and conflict intensity. Merchants in high-security risk regions denote low profits with estimated ranges of 5-35 percent, while merchants in safer regions note above average or high profit margins with estimated ranges of 60-80 percent profits.

Regulatory fragmentation persists. In SAF-controlled areas, formal customs and taxes apply, mainly to larger traders, while in areas under non-state control, merchants pay irregular security fees without formal oversight. This uneven governance contributes to significant disparities in market functionality and trader outcomes across regions.

Conclusions

This report reveals persistent and widening disparities in the prices, availability, and quality of essential commodities across Sudan. While some stability is observed in staple goods such as cereals and sugar, the overall market environment remains heavily disrupted by conflict, logistical bottlenecks, and weak regulatory oversight. Parallel markets have increasingly supplanted formal systems, particularly in the fuel and foreign exchange sectors, contributing to price volatility and uneven access. Insecurity, fragmented governance, and constrained infrastructure have most severely affected supply chains and market confidence in conflict-intense regions.

Despite these challenges, market actors continue to adapt by diversifying goods, expanding rural trade, and utilizing alternative storage and transport networks. These adaptations highlight both the resilience of traders and the urgent need for targeted support, particularly in enhancing market regulation, improving financial access, and restoring secure trade routes to stabilize and sustain local markets in the medium term.

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