



Essential Commodities Prices, Availability, and Market Actors’ Perceptions

November 2025

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Summary

Sudan’s markets in November 2025 showed continued, albeit uneven, stabilization. Prices of most essential commodities remained broadly stable, supported by seasonal harvest effects and improved availability. Wheat prices increased modestly due to slightly lower availability, while sorghum prices remained low and stable. Prices of lentils and rice were largely unchanged, pigeon pea prices declined, and vegetable prices showed mixed trends with improvements in onion availability and quality. Oilseeds, sugar, cooking oil, and fava bean prices were generally stable or declining, despite persistent inter-state disparities. Meat prices continued to rise for lamb and beef, while chicken prices stabilized and milk prices declined.

Fuel prices stabilized following earlier volatility, with improved availability in regular markets, though parallel market prices remained high. Fertilizer prices were stable, but perceived availability declined. Exchange rate pressures persisted, marked by a widening gap between official and parallel rates. Market functioning improved, with fewer merchants reporting supply chain, financial, and liquidity constraints, and minimal challenges related to storage, power, labor, and market safety. Profitability

stabilized, tax and fee payments increased further, and most merchants expect to maintain current trading levels, signaling cautious but stable market outlooks

Cereals and Flour

Cereal prices remained relatively stable in November, with a modest increase in both wheat and millet prices compared to October 2025 (Figure 1). Wheat prices, which declined sharply in early October, increased modestly in November and stabilized at higher level throughout the month, reflecting declining availability. Sorghum prices remained relatively low and stable throughout November, supported by improved availability linked to the harvest season. Millet prices showed a slight increase in early November, followed by a gradual decline over the last two weeks of the month. Wheat flour prices remained high overall compared to other cereals and were broadly stable across October and November.

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

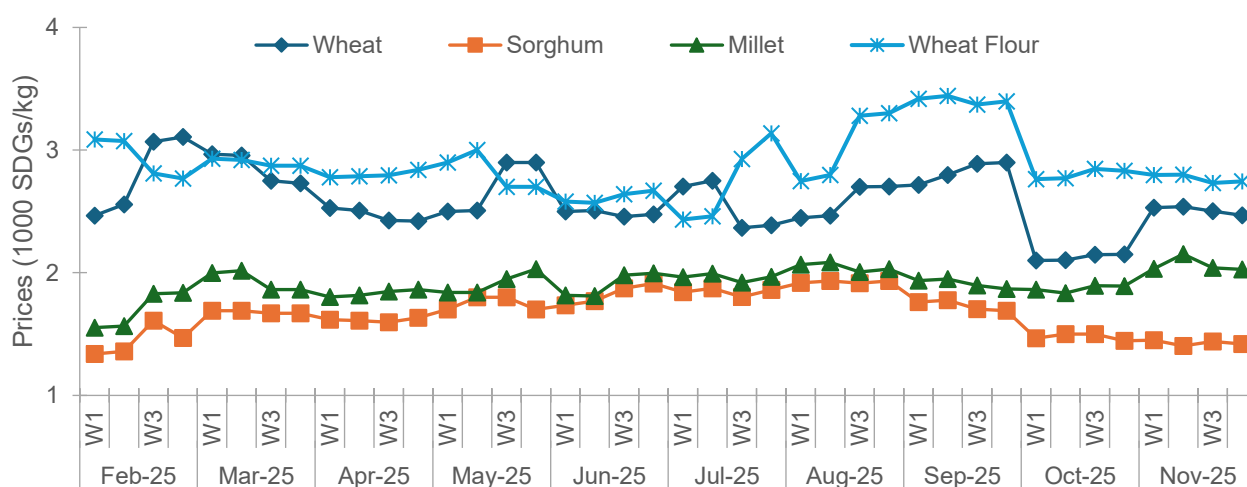


Figure 2 shows notable variation in cereal and wheat flour prices across Sudanese markets between October and November 2025. Wheat prices increased slightly in most states, with the highest prices recorded in Blue Nile and Gedaref states, while the lowest price recorded in Al Gezira. Sorghum and millet prices remained relatively low and more stable across states. Wheat flour prices remained highest in most Darfur states and Khartoum.

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

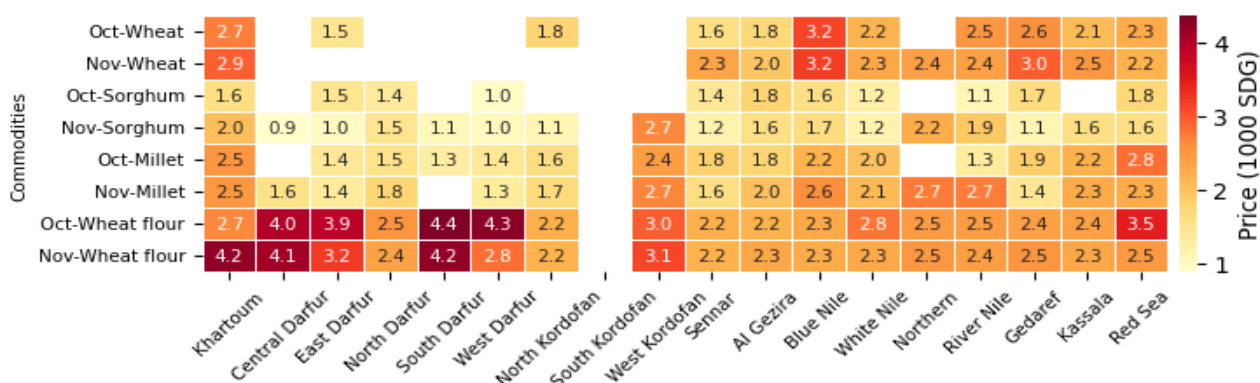
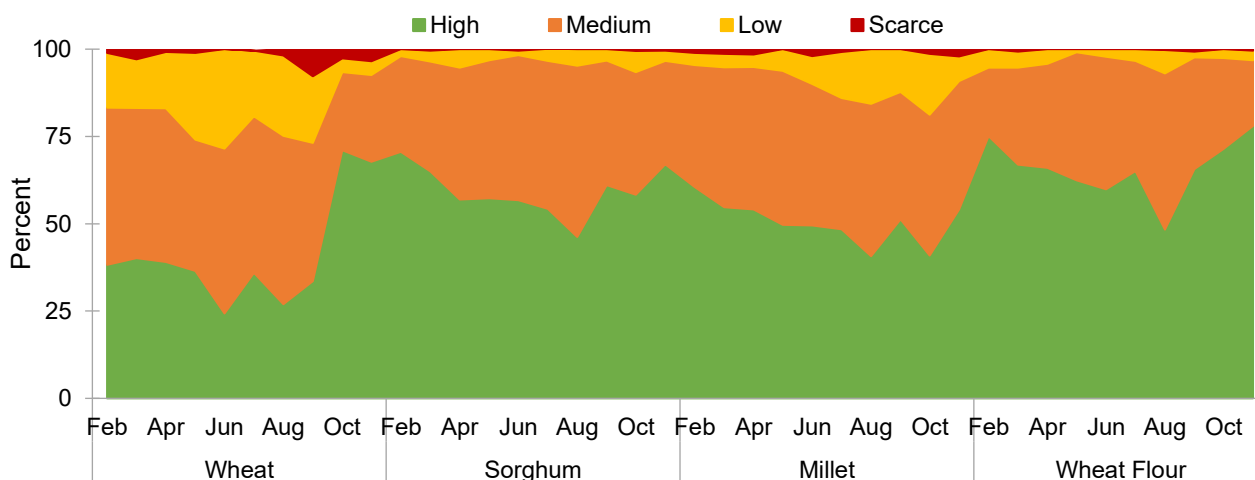


Figure 3 shows the perceived availability of cereals and wheat flour from February to November 2025. In November, the availability of sorghum, millet and wheat flour saw the most notable improvements, with fewer traders reporting on low or scarce availability and the share of traders reporting

high availability increased from 58 percent, 41 percent, and 71 percent in October to 67 percent, 54 percent, and 78 percent respectively in November. In contrast, wheat availability declined slightly, with the share of traders reporting high availability decreased from 71 percent in October to 68 percent in November.

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



Lentils, Rice and Pigeon Peas

Figure 4 presents the average weekly prices of lentils, rice, and pigeon peas during October and November 2025. Prices for lentils and rice remained stable throughout the period, while pigeon pea prices showed a slight decline at the beginning of November before stabilizing toward the end of the month.

Figure 5: Local prices of lentils, rice and pigeon peas, weekly average, 1000 SDG/Kg, October – November 2025

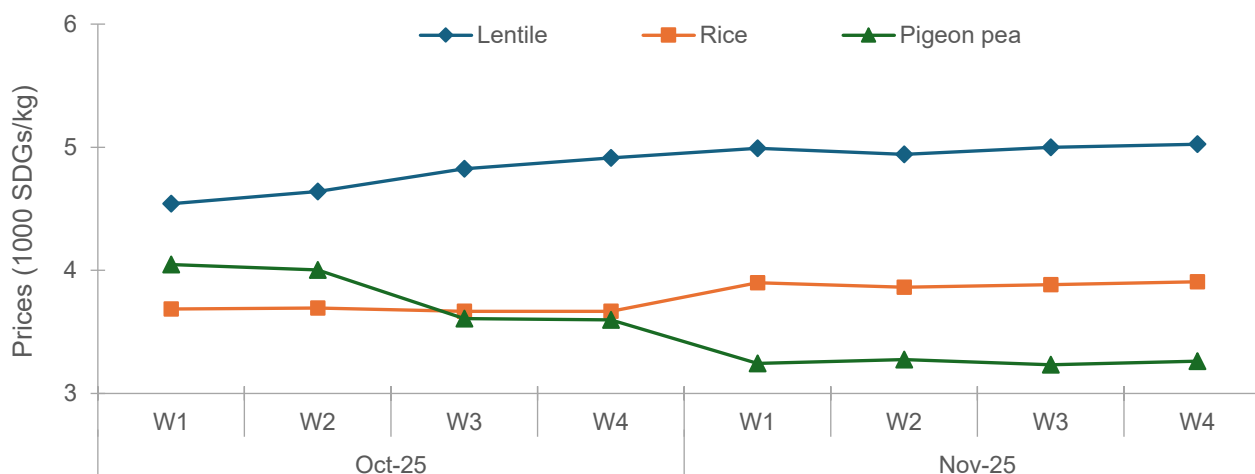


Figure 5 shows prices of lentils, rice, and pigeon peas across Sudan’s states during October and November 2025, highlighting regional disparities among markets. For lentils and rice, most states recorded price increases in November, with South Darfur reporting the highest prices and Khartoum the lowest. In contrast, pigeon pea prices declined in most states during November, with Al Gezira and Gedaref recording the lowest prices and West Kordofan the highest. For the three commodities, prices in West Kordofan and the Darfur region remain higher than in other states, largely due to the ongoing conflict.

Figure 5: Local monthly average prices of lentils, rice and pigeon peas across states, 1000 SDG/Kg, October – November 2025

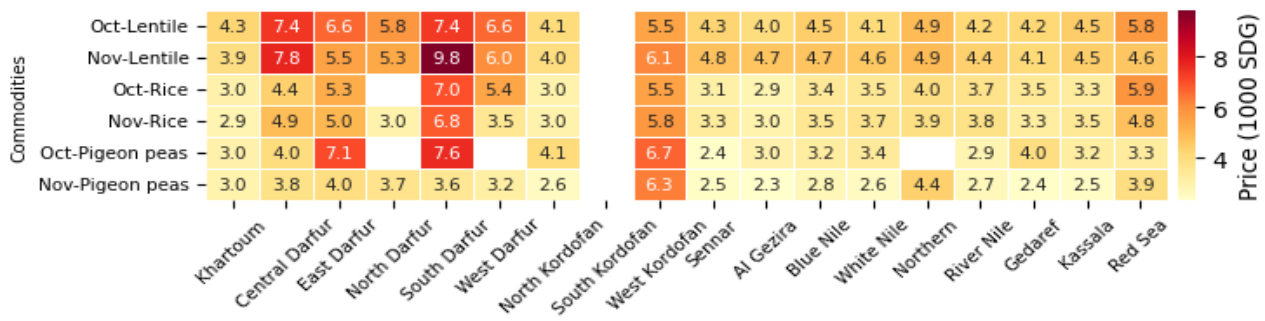
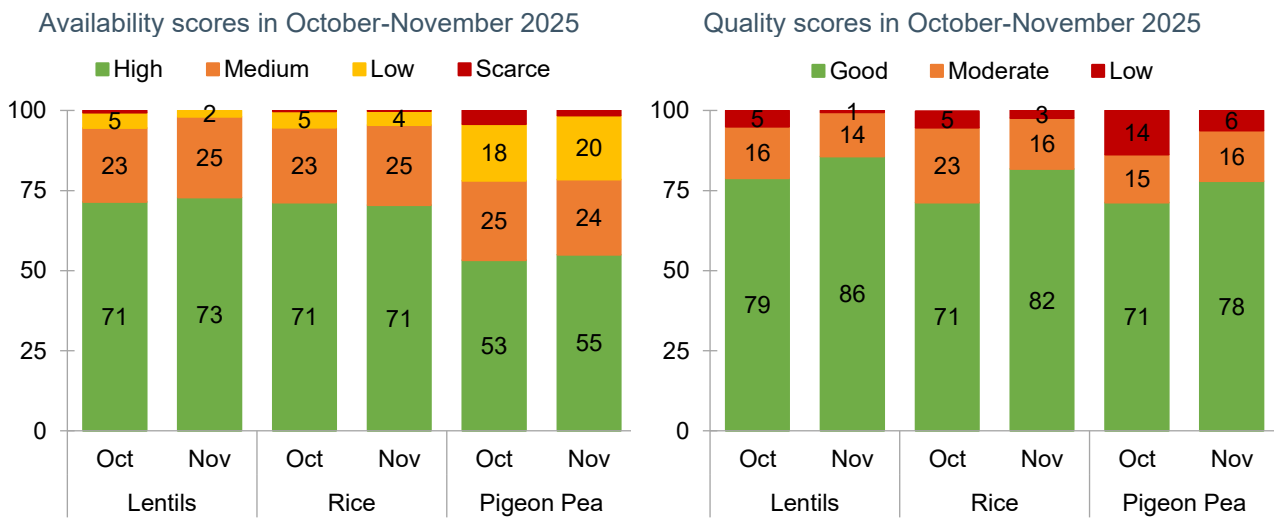


Figure 6 illustrates the perceived availability and quality of lentils, rice, and pigeon peas during October and November 2025. Rice and lentils maintained consistently high levels of reported availability, while pigeon peas were comparatively less available. Perceptions of quality improved in November for all three commodities, with higher reported “Good” scores.

Figure 6: Lentils, Rice, and Pigeon Peas availability and quality scores, October – November 2025



Vegetables

Figure 7 shows the vegetable prices from February to November 2025. In November, tomato and potato prices increased in early November, then declined gradually through the month. Onion prices declined slightly in November, reflecting improvement in availability.

Figure 7: Local prices of vegetables, weekly average, SDG/Kg, February - November 2025

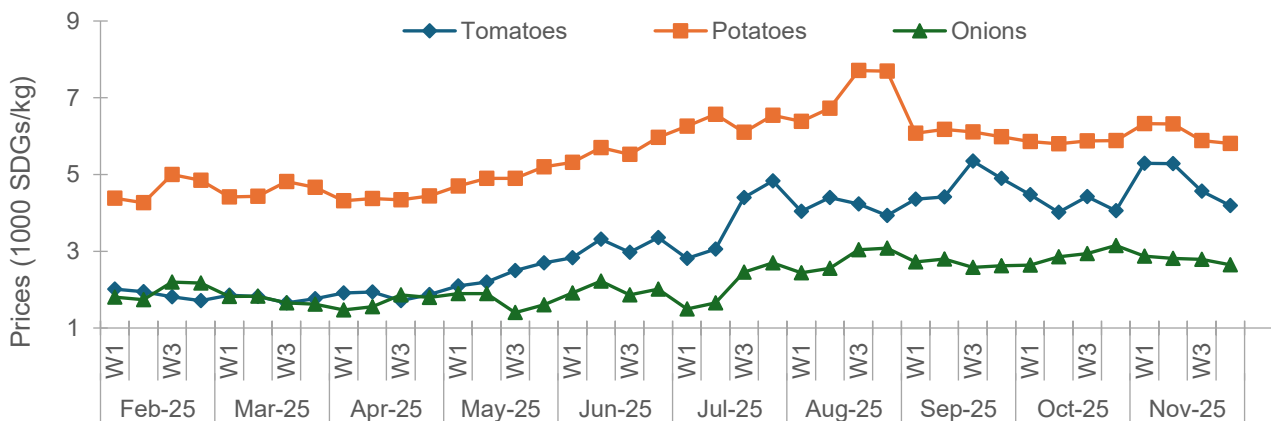


Figure 8 shows that regional disparities in vegetable prices persisted in November across Sudan markets. The highest prices of tomato are recorded in Red Sea, Northern, and South Darfur states, while the lowest price is recorded in Central Darfur. Potato prices, which are generally higher than those of tomatoes and onions, also varied notably, with the highest prices recorded in West Kordofan and Sennar states. While onion prices showed moderate variation across states, with the highest prices recorded in West Kordofan and Red Sea states, and the lowest prices recorded in Al Gezira.

Figure 8: Local monthly average prices of vegetables across states, 1000 SDG/Kg, October – November 2025

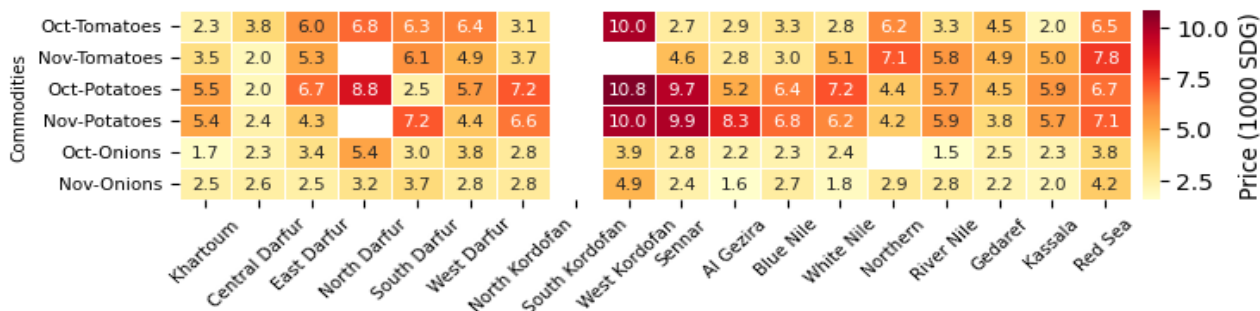


Figure 9 shows a decline in the availability of tomatoes and potatoes in November compared to October. The share of traders reporting high availability of tomatoes and potatoes decreased slightly from 59 percent, 65 percent in October to 57 percent for both commodities in November. In contrast, onion perceived availability increased from 40 percent in October to 46 percent in November.

Figure 9: Vegetable availability scores, February - November 2025

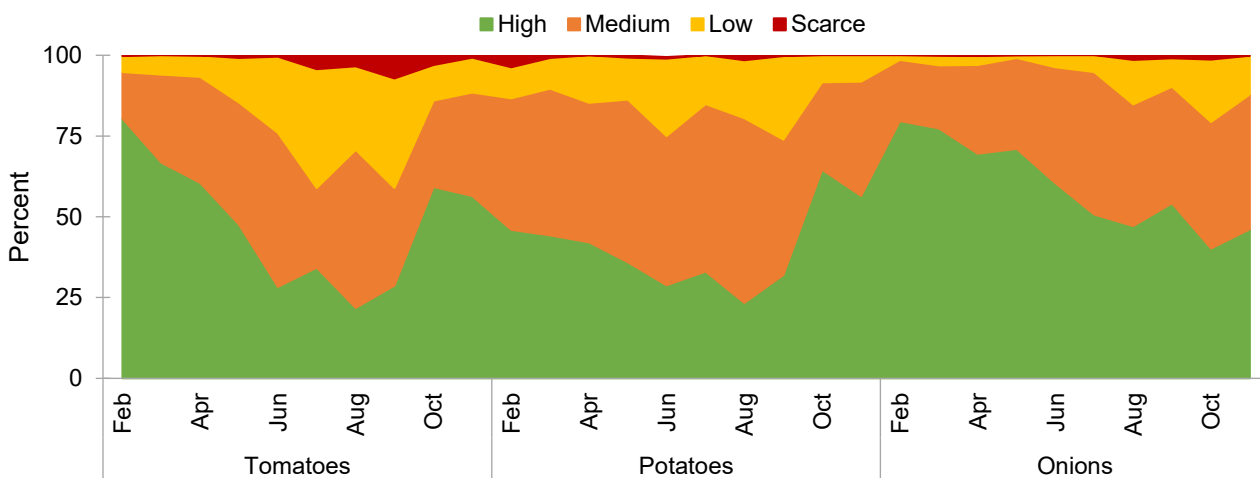
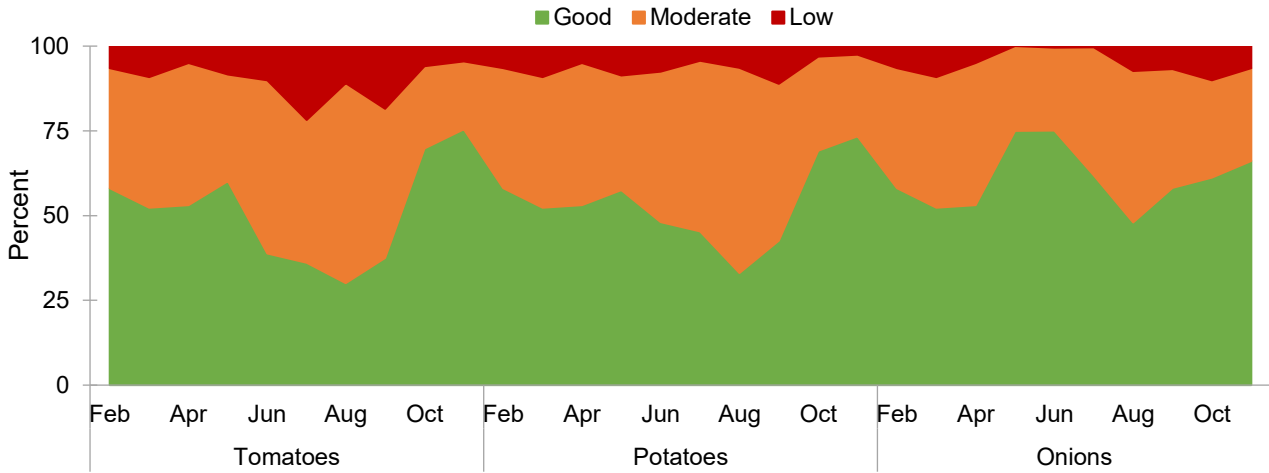


Figure 10 shows traders' perceptions of vegetable quality from February to November 2025, revealing a notable improvement across all commodities in November compared to October. Tomato, potatoes, and onions good quality reporting increased in November compared to October by 6 percent, 4 percent, and 5 percent, respectively, while moderate and low-quality ratings declined accordingly.

Figure 10: Vegetable quality scores, February - November 2025



Meat and Animal Products

Figure 11 shows price trends for meat and animal products between February and November 2025. During this period, prices for lamb and beef followed an overall upward trend. Chicken prices stabilized after a sharp increase at the beginning of October. Milk prices declined notably starting in September, while fish prices rose steadily from September onward. Egg prices remained stable throughout the period.

Figure 11: Local prices in SDGs of meat and animal products, weekly average, February-November 2025

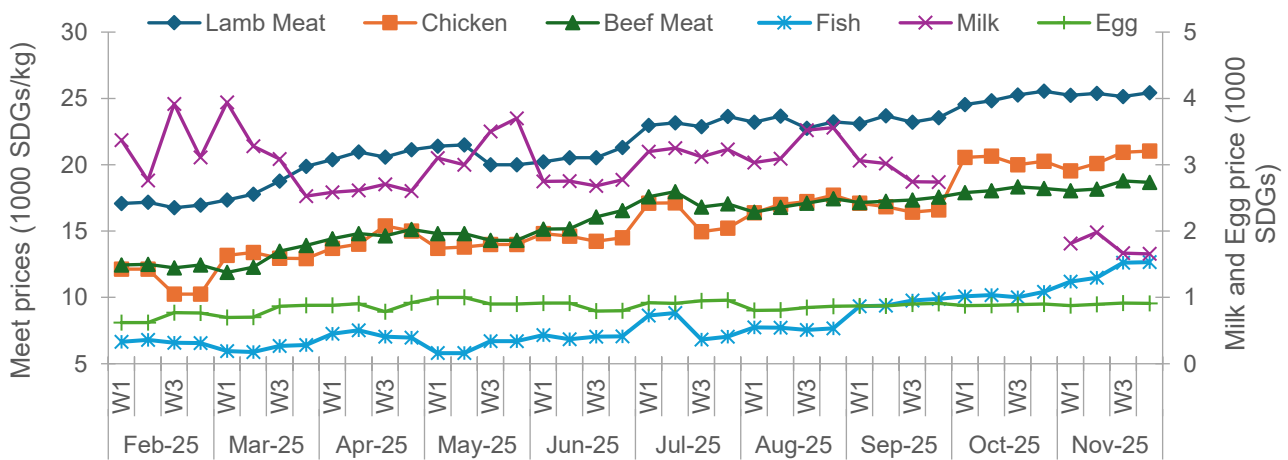


Figure 12 presents meat and animal product prices across Sudan's states for October and November 2025, highlighting regional disparities. Overall, most states experienced price increases between October and November, except for chicken, which showed a mixed trend. For lamb, Khartoum and Red Sea recorded the highest prices, while East Darfur and North Darfur reported the lowest. For chicken, Khartoum and White Nile had the highest November prices, whereas Gedaref and Al Gezira reported the lowest. For beef, Red Sea maintained the highest price, while East Darfur and Central Darfur recorded the lowest. For fish, the highest price was observed in Al Gezira, while the lowest was in South Darfur.

Figure 12: Local prices of meat and animal products across states (1000 SDGs), October - November 2025.

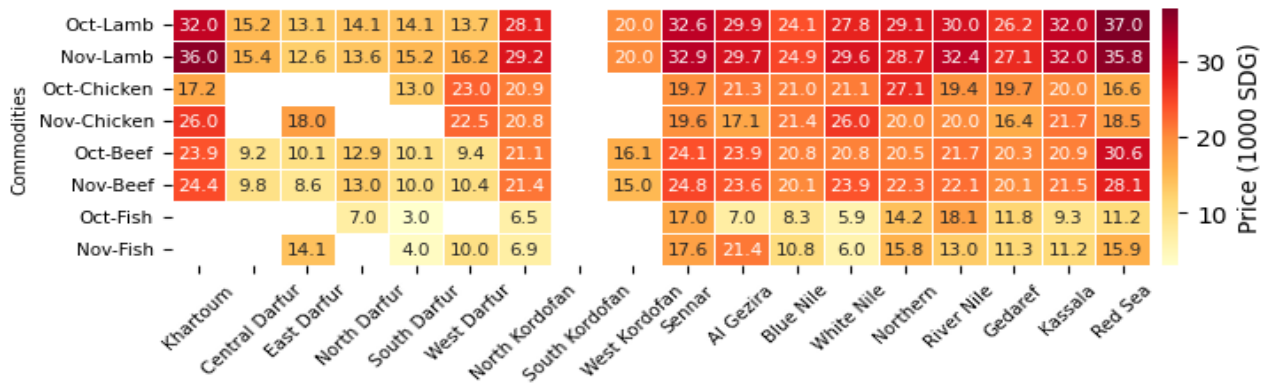
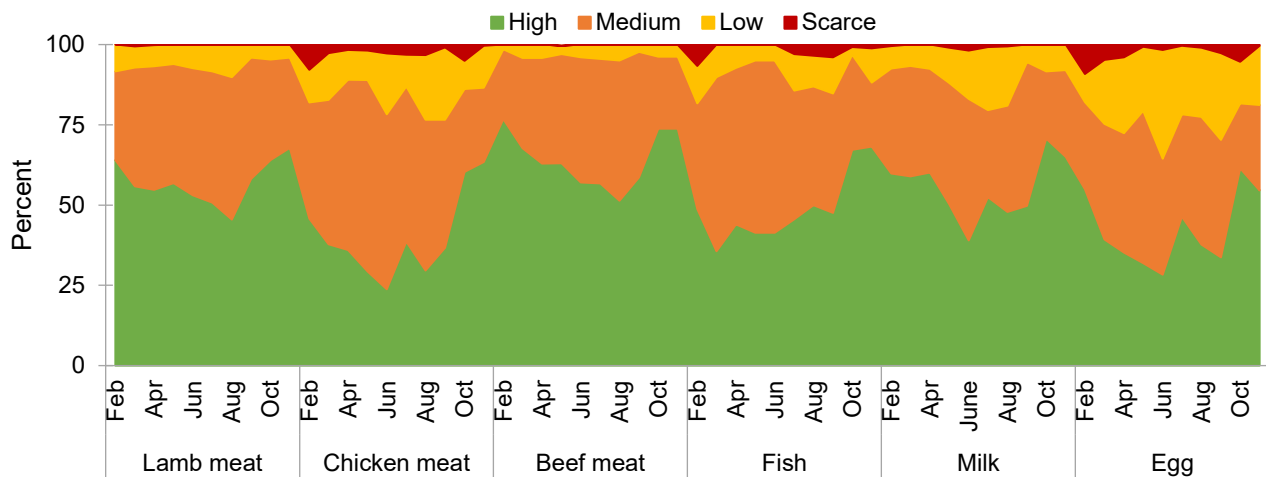


Figure 13 presents trends in the perceived availability of meat and animal products as reported by traders between February and November 2025. In November, the share of traders reporting high availability increased only for chicken and fish.

Figure 13: Meat and animal products availability scores, February - November 2025



Oilseeds, Cooking Oil, Sugar, and Fava Beans

Figure 14 illustrates price trends for sesame, groundnuts, cooking oil, sugar, and fava beans between February and November 2025. Prices for fava beans, sesame, and groundnuts declined in October and November, with only minor fluctuations for sesame and groundnuts. In contrast, sugar and cooking oil prices remained largely stable throughout these two months.

Figure 14: Local prices (1000 SDGs) of oilseed (Kg), cooking oil (Liter), sugar (Kg), and fava beans (Kg), February – November 2025

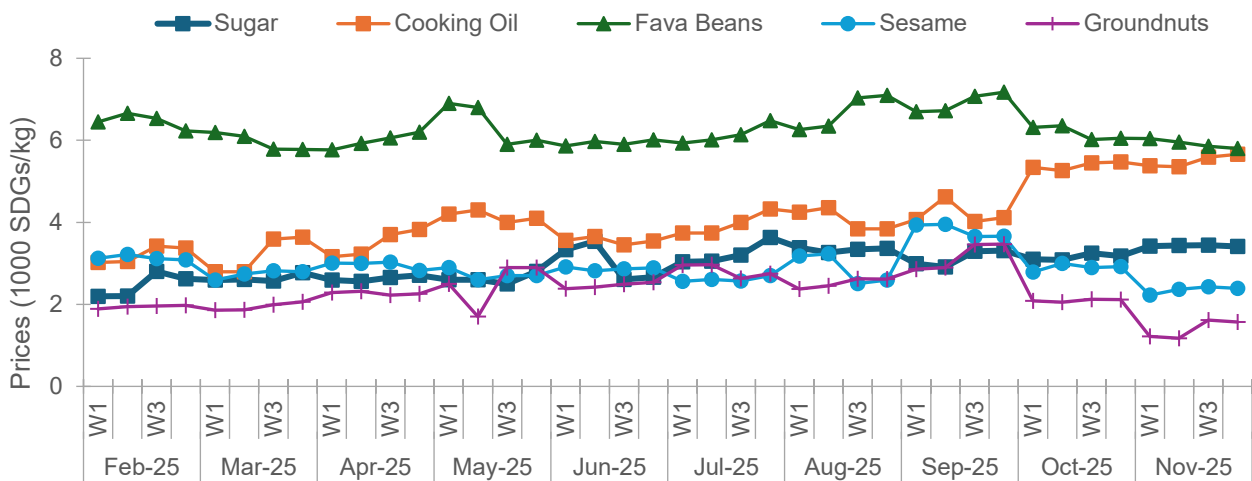


Figure 15 presents prices of sesame, groundnuts, cooking oil, sugar, and fava beans across Sudan’s state markets in October and November 2025. Prices of sugar, sesame, and groundnuts showed relatively low variation across states, while fava beans and cooking oil exhibited higher price levels and greater spatial disparities. Fava bean prices were highest in West Kordofan, South Darfur, and North Darfur, and lowest in Red Sea and Gedaref. Cooking oil prices peaked at 14,200 SDGs in North Darfur in November, more than five times the price recorded in Gedaref.

Figure 15: Oilseeds, cooking oil, sugar, and fava beans prices (1000 SDGs) across states, October - November 2025

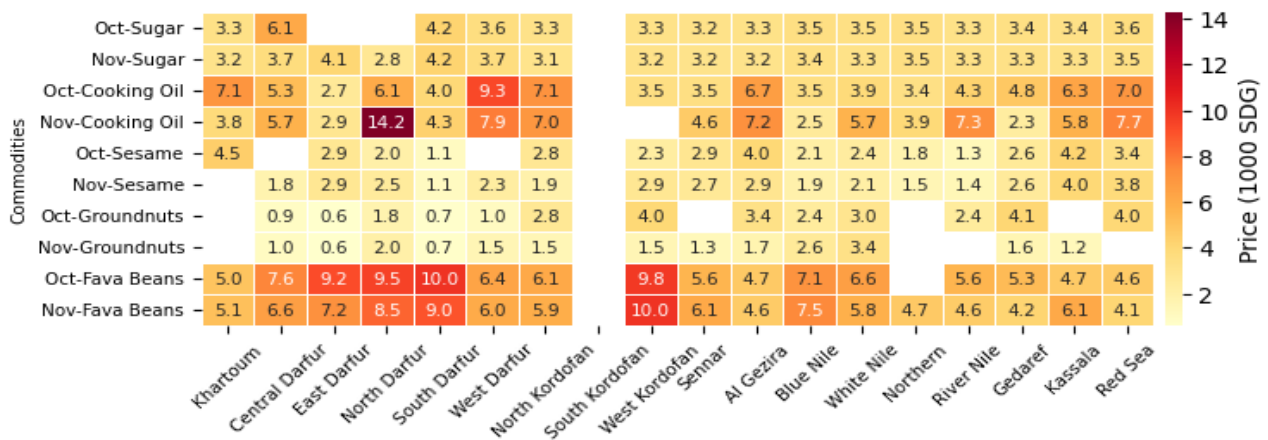
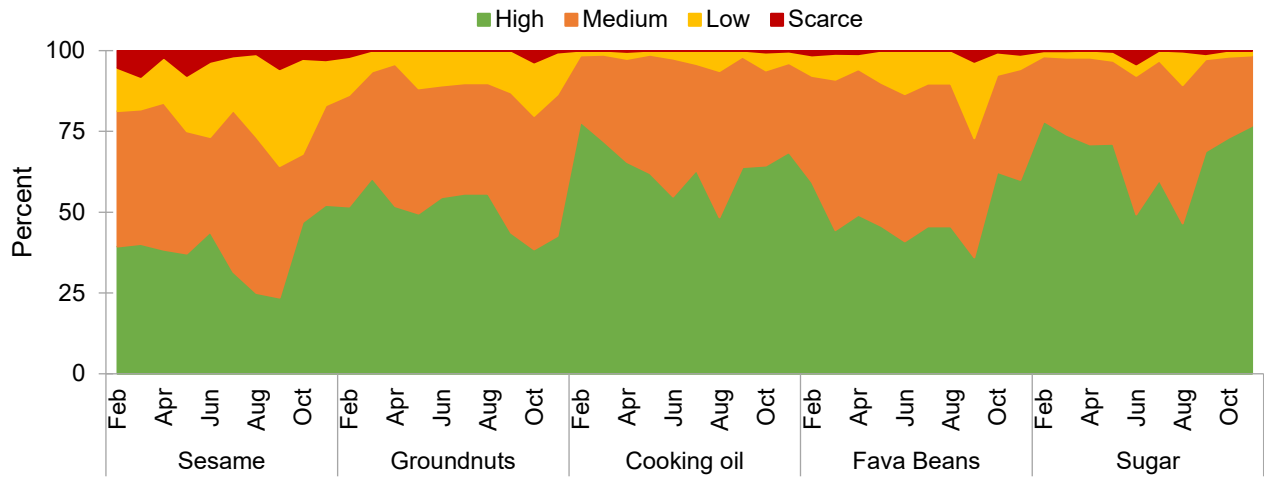


Figure 16 illustrates trader-reported availability trends for sesame, groundnuts, cooking oil, sugar, and fava beans between February and November 2025. In November, the share of traders reporting high availability increased for all commodities except fava beans.

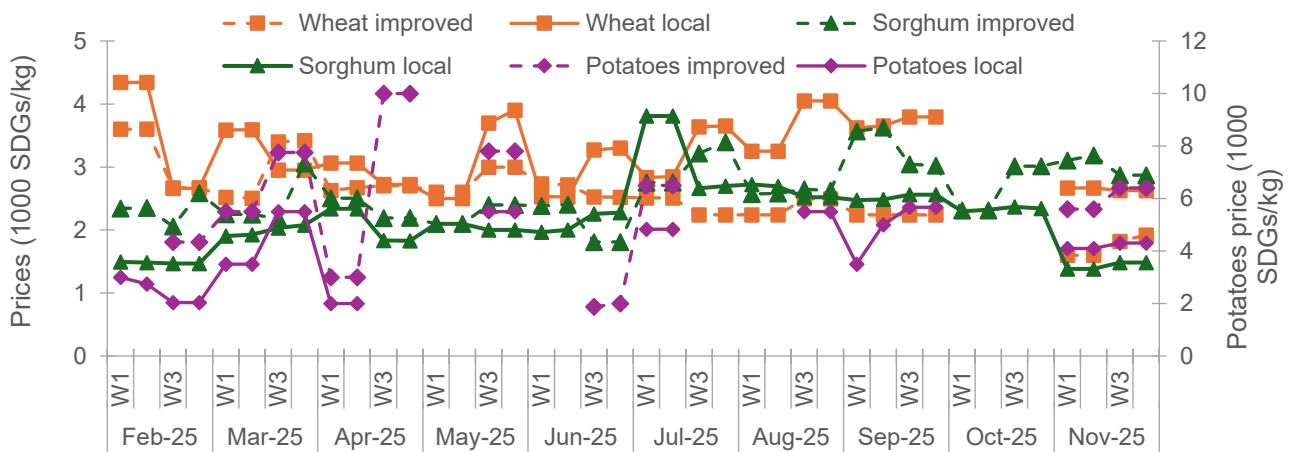
Figure 16: Oilseeds, cooking oil, sugar, and fava beans availability scores, February - November 2025



Seeds (Improved and Local)

Improved and local seed prices remained relatively stable in November, with improved sorghum prices exhibiting some fluctuation, declining toward the end of the month (Figure 17).

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



Fertilizers

Figure 18 shows fertilizer prices from February/May to November 2025. In November, Urea and DAP prices remained consistent and relatively stable throughout the month.

Figure 18: Fertilizer prices (1000 SDG/Kg), monthly average, February/May – November 2025

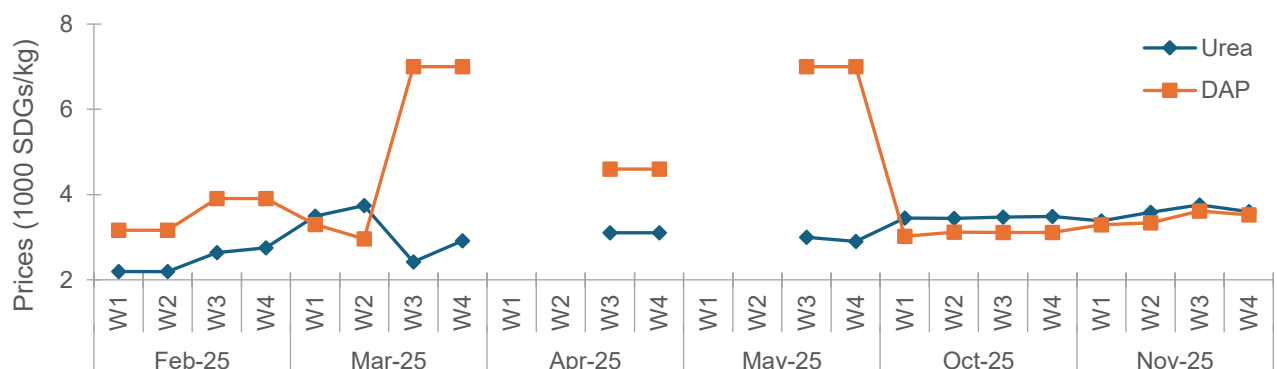
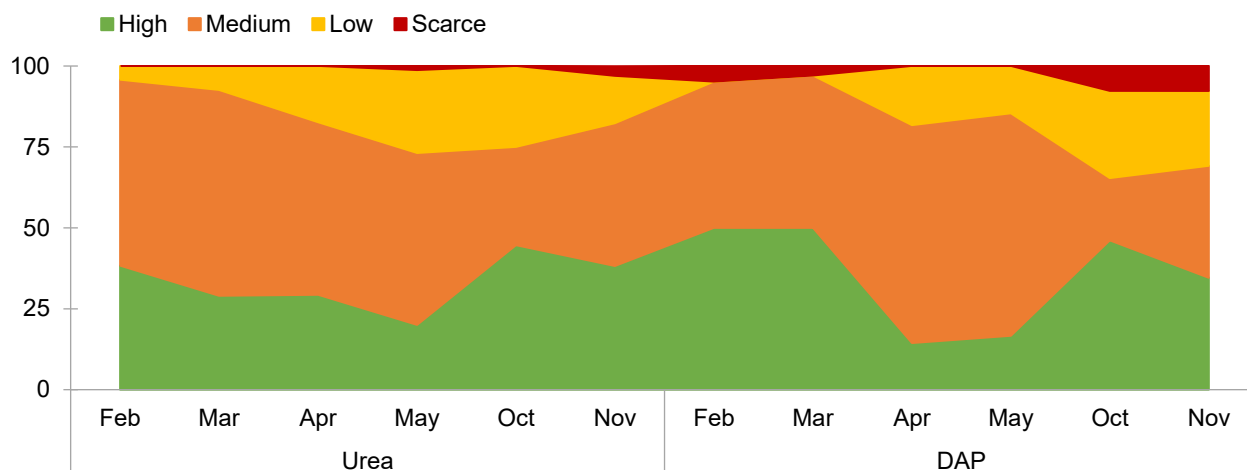


Figure 19 shows perceived availability of fertilizers from February/May to November 2025. In November, high availability scoring declined for both Urea and DAP compared to October levels. The share of traders reporting high availability of Urea and DAP decreased from 45 percent and 46 percent in October to 38 percent and 35 percent respectively in November.

Figure 19: Fertilizers availability scores, February/May - November 2025



Diesel and Petrol

Fuel prices showed mixed but generally diminishing trends across both regular and parallel markets in November. Diesel and petrol prices in the regular market declined slightly and then stabilized toward the end of the month. In the parallel market, prices remained high but did not continue the sharp increases observed in earlier months, although petrol prices showed some fluctuation. Throughout November, parallel market prices for both fuels consistently exceeded regular market prices, with the price gap between the two markets widening. Overall, November marked a period of relative price stabilization following the volatility and peaks observed in September and October (Figure 20).

Figure 20: Local fuel prices, SDGs/Liter, monthly average, February – November 2025

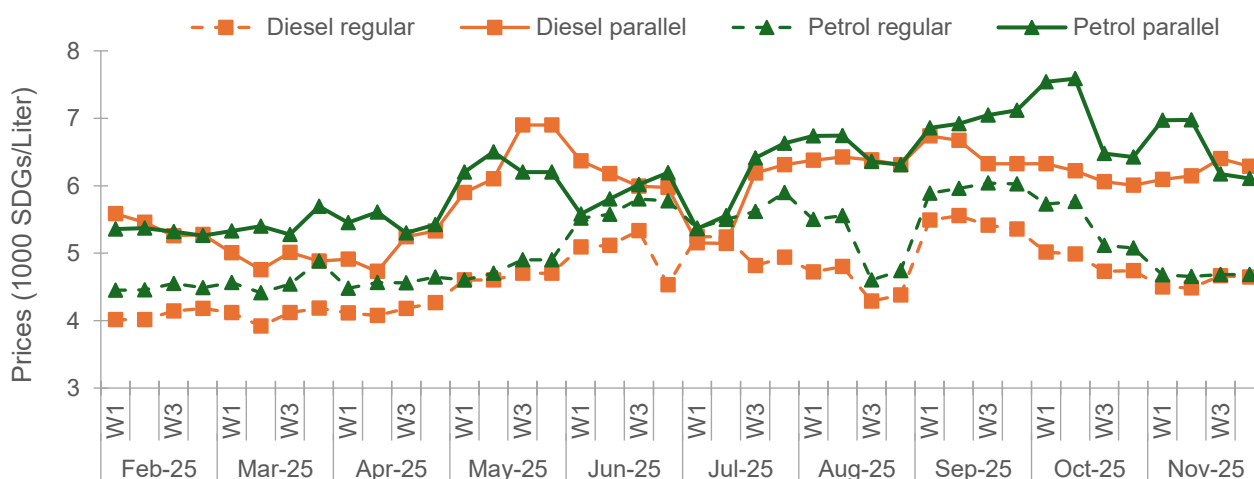
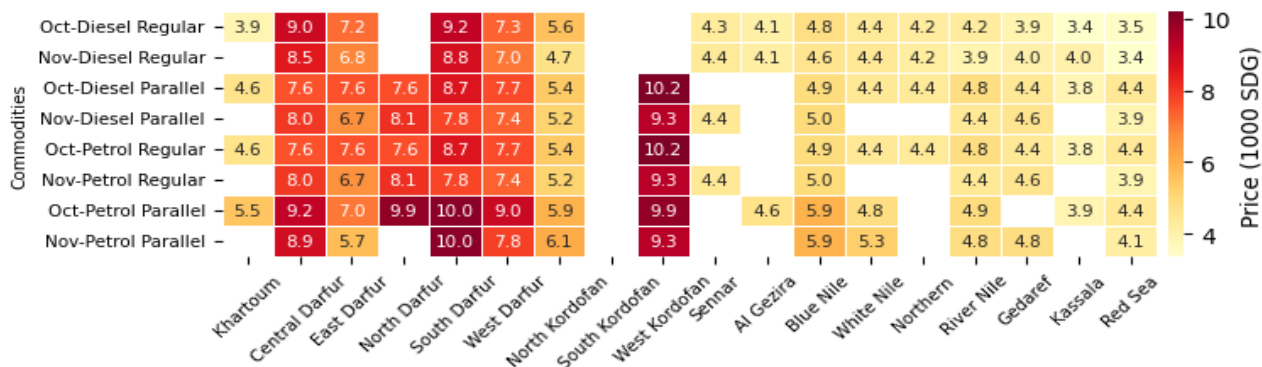


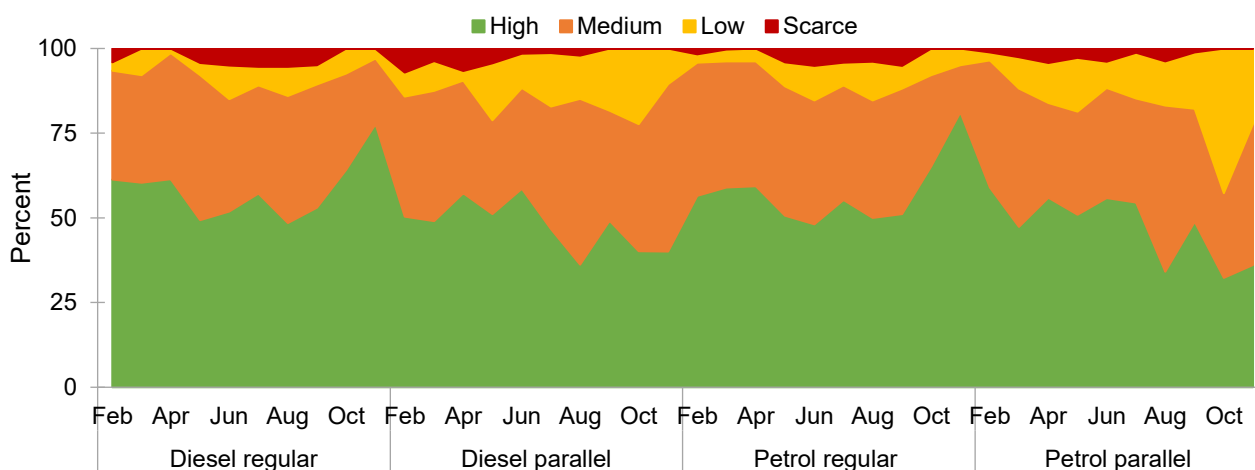
Figure 21 shows the spatial and temporal dynamics of fuel prices across states in October and November. Fuel prices remained substantially higher in the Darfur states and West Kordofan compared to other regions. While prices generally declined in November, notable within-region variations persist.

Figure 21: Fuel prices across states, 1000 SDGs/Liter, October November 2025



Between October and November, traders’ perceptions of fuel availability significantly improved in the regular market but remained relatively stable in the parallel market. For diesel in the regular market, the share reporting high availability increased from 64 percent in October to 78 percent in November. On the other hand, in the diesel parallel market, high availability remained stable at around 40 percent. A similar pattern is observed for petrol: regular petrol high availability increased from 65 percent to 81 percent, while parallel petrol high availability slightly increased from 32 percent to 36 percent (Figure 22).

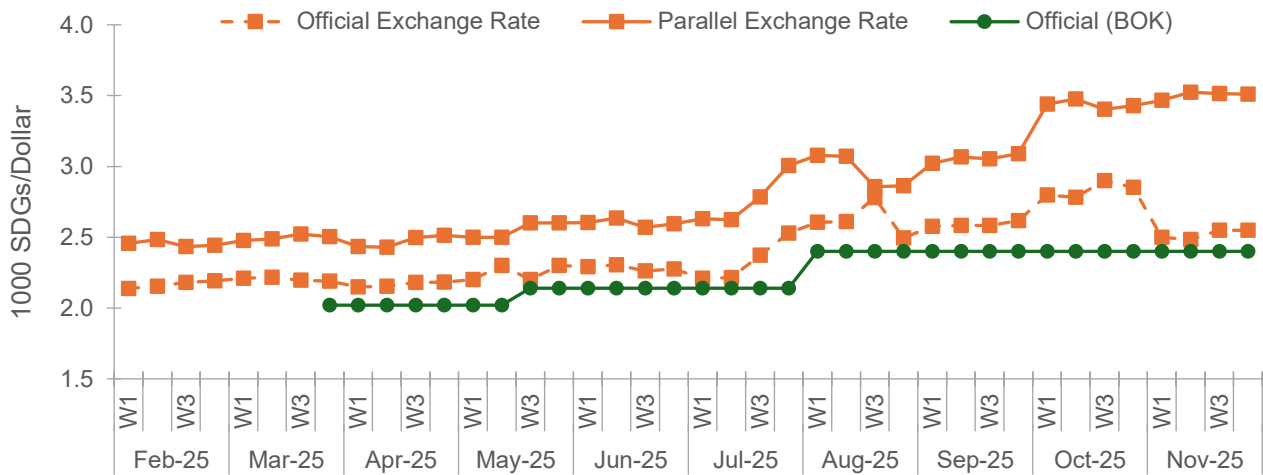
Figure 22: Fuel availability scores, February - November 2025



Exchange Rates

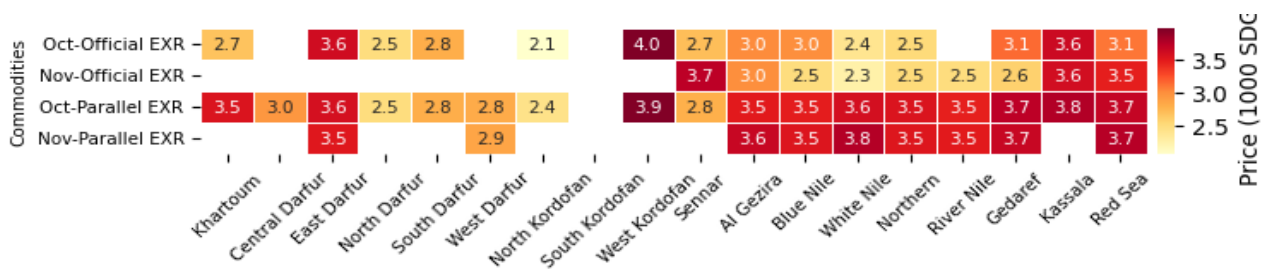
The parallel exchange rate remains relatively stable in November. In contrast, the official exchange rate sharply dropped between October and November from 2.9k to 2.5k, but remained relatively stable in November, fluctuating only slightly around 2.5–2.6k SDG/USD (Figure 23). As a result, the gap between the parallel and official exchange rates widened further in November, indicating continued divergence between formal and informal market conditions. However, the reported official and parallel rates are consistently higher than the rate reported by the Bank of Khartoum (BOK).

Figure 23: Exchange Rate, SDG/US Dollar, February –November 2025



The official exchange rate remained broadly stable in most states, fluctuating within the 2.3k–3.6k SDG/USD range, with a substantial increase observed in Sennar (from 2.7k to 3.7k) and a modest increase observed in the Red Sea state. In contrast, a decline in the official rate was observed in the Blue Nile (3k to 2.5k). In parallel markets, the exchange rates remained stable in many states, with a modest increase recorded in Al Gezira and White Nile. Spatially, eastern and northeastern states continued to exhibit the highest parallel exchange rates (Figure 24).

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



Labor wages

Figure 25 shows the biweekly average daily wages for shop sellers, porters, and agricultural workers across Sudan from July to November 2025. For most of the period, porter wages remained the highest and showed a gradual upward trend between October and November. Agricultural workers' wages stayed relatively stable with slight fluctuations, while shop seller wages declined in early October before stabilizing toward the end of the period.

Figure 25: Labor daily wages, biweekly average, in SDG/day, July – November 2025

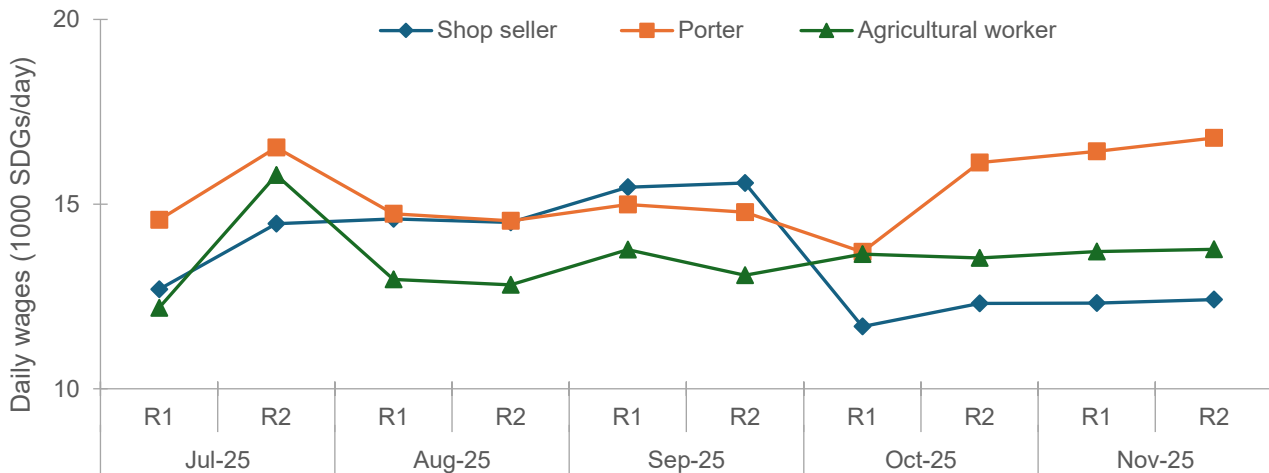


Figure 26 shows notable variation in shop seller daily wages across Sudanese states between July and November 2025. In July the highest wages were recorded in Sennar, Gadaref, Kassala and West Darfur states, while the lowest wages were observed in West Kordofan and East Darfur states. In August and September, the highest wages Al Gezira and Sennar while in October and November the highest were recorded in Central Darfur state.

Figure 26: Shop seller daily wage across states 1000 SDG/day, July – November 2025

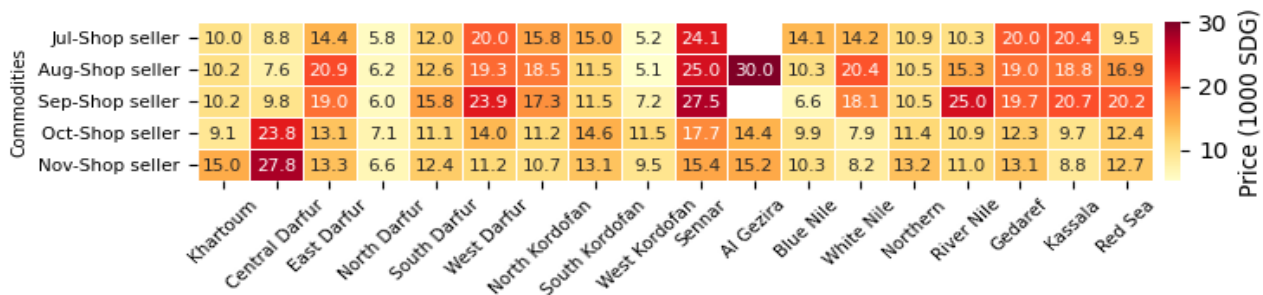


Figure 27 shows porter daily wages across Sudanese states between July and November 2025. Throughout the period, porter wages continued to show marked regional variations, with higher wages between July and September recorded in West Darfur and Sennar states, while the lowest wages recorded in West Kordofan and North Darfur during the same period. In October and November West Kordofan and Central Darfur recorded the highest daily wages followed by Al Gezira, Sennar, and Red Sea states.

Figure 27: Porter daily wage across states 1000 SDG/day, July – November 2025

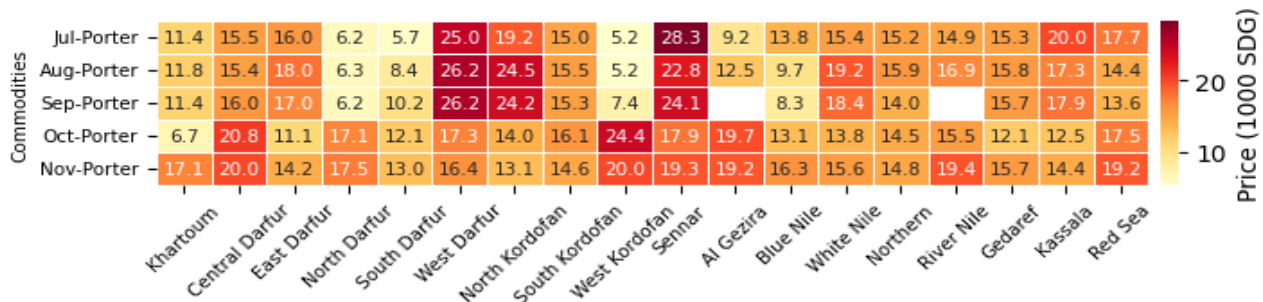
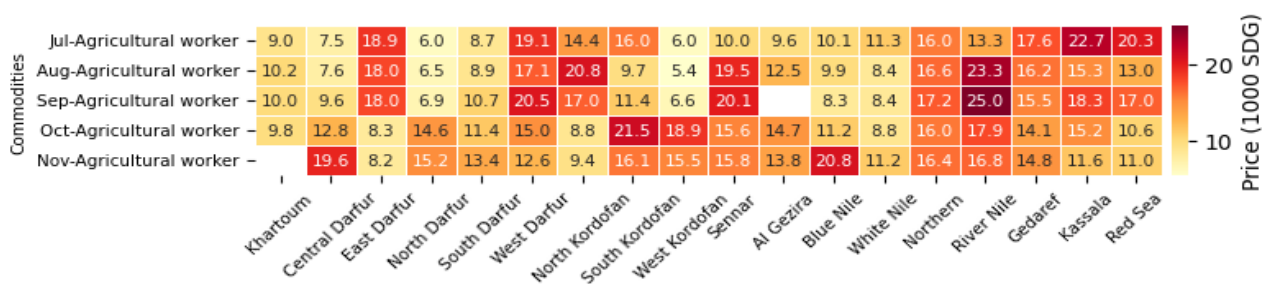


Figure 28 shows distinct regional differences in agricultural worker daily wages across Sudanese states between July and November 2025. In July and August, the higher wages were recorded in

Kassala and River Nile, while the lowest wages were recorded in North Darfur, West Kordofan. During September, October and November the highest wages were observed in River Nile, South Kordofan and Blue Nile.

Figure 28: Agricultural worker daily wage across states 1000 SDG/day, July – November 2025



Market Actors' Perceptions

In November 2025, 116 merchants across 15 states were surveyed about market functionality and perceptions on trading activities. Out of the surveyed merchants, 51.7 percent were medium-scale traders, 14.7 percent large-scale traders, and 33.6 percent small-scale traders.¹

Challenges Facing Merchants

Supply Chain and Logistics

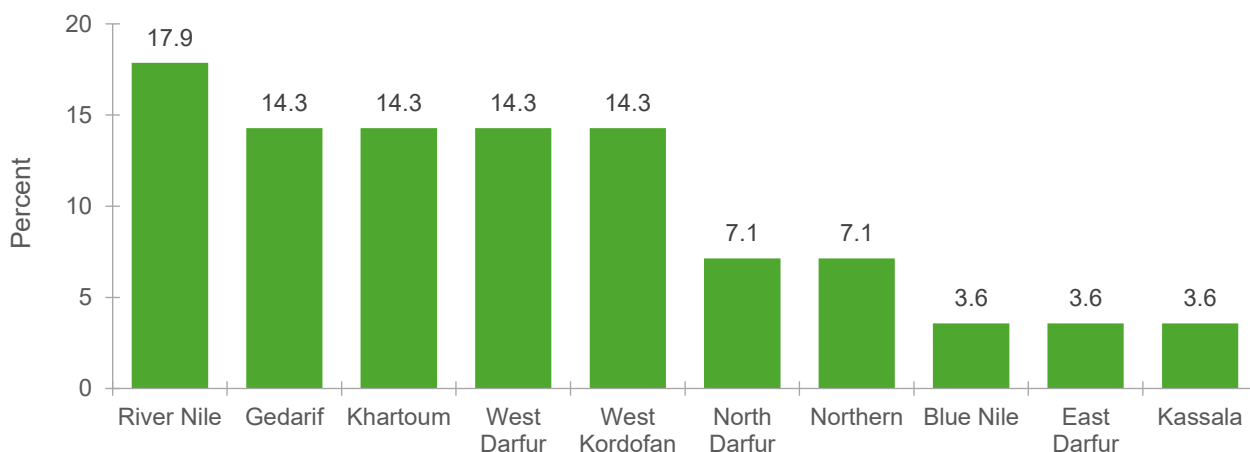
The proportion of merchants reporting supply chain and logistical challenges declined considerably in November compared to the previous month, whereby 24.1 percent of merchants reported supply chain challenges compared to 39.5 percent in October. Figure 29 shows that the supply chain challenges in November were most pronounced in the River Nile state, followed by Gedaref, Khartoum, West Darfur, and West Kordofan states.

In Khartoum and River Nile states merchants report high transportation costs and transit fees, while in West Darfur merchants report closure of Adre crossing point as a key impediment to trade movements in November. Similarly, merchants in West Kordofan report the blockage of the trade route from Ad Dabbah as a key impediment to trade of essential commodities in November. In direct relation to conflict, merchants in North Darfur report that airstrikes and drones highly impacted influx of commodities into markets.

Overall, the surveyed merchants report continued supply chain challenges; namely high transportation costs, cash constraints and high transit and checkpoint fees, collectively pushing consumer prices upwards. In November, majority of merchants reported reductions in quantities of commodities imported and supplied to consumers, pushing higher scarcity in essential commodities with increased prices.

¹ Traders were asked to self-identify the size of their business using five categories: largest in the market, large, medium, small, and smallest in the market. For reporting purposes, these were consolidated into three groups: large-scale, medium-scale, and small-scale traders.

Figure 29: Proportion (percentage) of merchants facing supply chain challenges, by state (N=28)



Demand Conditions

Demand for commodities remained broadly stable in November relative to October. Only 29.3 percent of merchants reported changes in demand, compared to 51 percent in October. Demand fluctuations were more pronounced in Blue Nile, River Nile, Gedaref, and West Darfur states, while markets in Northern, White Nile, and North Kordofan states remained largely stable.

Merchants reported demand declines in several states, mainly due to high prices of commodities, harvest season, and limited cash availability in some markets. In Blue Nile, the harvest season increased domestic supply and reduced demand. In Northern and Red Sea states, weakened purchasing power constrained demand for essential commodities, while in River Nile, rising food prices dampened demand. In contrast, merchants in Gedaref reported stronger demand following the end of the rainy season, which improved market access, increased supply, and supported more active market transactions.

Financial and Liquidity Constraints

A smaller share of merchants reported financial and liquidity constraints in November compared to October. Only 23.3 percent reported liquidity challenges, down from 35 percent in October, indicating improved cash flows, trade activity, and related transactions.

Despite this improvement, regional disparities persist. Among merchants surveyed across 15 states, the highest incidence of liquidity constraints was reported in Blue Nile (22.2 percent), followed by Khartoum and Kassala (18.5 percent each). In contrast, merchants in Northern, North Kordofan, West Kordofan, and White Nile states reported minimal financial and liquidity challenges relative to other states.

Overall, merchants in 11 of the 18 states continued to face cash and liquidity constraints. These challenges have limited imports and bulk purchases, contributing to reduced trade flows in several markets. Merchants in Blue Nile and Kassala also reported rising indebtedness as a key barrier to expanding trade volumes and profitability.

Reflecting the relative improvement and adaptation of the financial system and merchants' financial situation, labor-related constraints were negligible in November, with only 1 percent of merchants reporting difficulties in hiring or paying wages.

Storage and Power Access

Conditions related to storage and power access continued to improve in November. Overall, 97.4 percent of merchants across the 15 surveyed states reported no challenges, up from 92.7 percent in October. The highest shares of merchants reporting no storage or power constraints were observed in Blue Nile, Kassala and River Nile states (33 percent each). Merchants in Kassala report having access to storage facilities, however, spoilage and damage of goods due to poor storage facilities quality impedes safe storage.

Safety and Security

Market safety and security improved in November relative to previous months. Only 3.5 percent of merchants reported safety and security concerns within markets, down from 5.1 percent in October and 4.5 percent in September. While overall concerns remain limited, they are unevenly distributed geographically, with merchants in North Darfur and River Nile reporting residual security risks. In North Darfur merchants report direct risk of active conflict, violence and looting in markets. While in River Nile, merchants report theft and looting incidents, thus, costing merchants additional security costs.

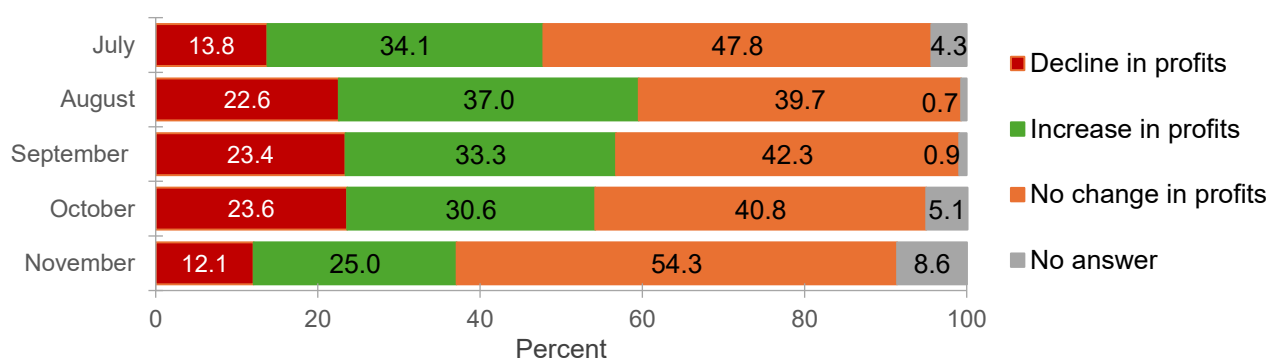
Profits and Profitability Trends

Merchants across 16 states reported mixed but stabilizing profit outcomes in November 2025. The share of merchants reporting profit increases declined to 25 percent, down from 30.6 percent in October. Out of these merchants reporting increases in profits, most increases in profit reported as modest (less than 50 percent). At the same time, the proportion reporting stable profits rose markedly to 54.3 percent, compared to 40.8 percent in October. Importantly, only 12 percent of merchants reported profit declines in November, indicating reduced downside pressure on profitability.

Profit increases were most prevalent in White Nile (34.5 percent) and West Kordofan (27.6 percent), while smaller shares of merchants in Gezira and West Darfur (10.3 percent each) reported gains. Stable profit margins were widespread across 11 states, with the highest concentrations in Northern (27 percent), Blue Nile (20.6 percent), and North Kordofan (15.9 percent).

Although fewer merchants reported declining profits overall, profit losses were concentrated in West Darfur and Gedaref (21.4 percent each), followed by Blue Nile (14.3 percent).

Figure 30: Percentage of merchants reporting changes in profits (July-November 2025)



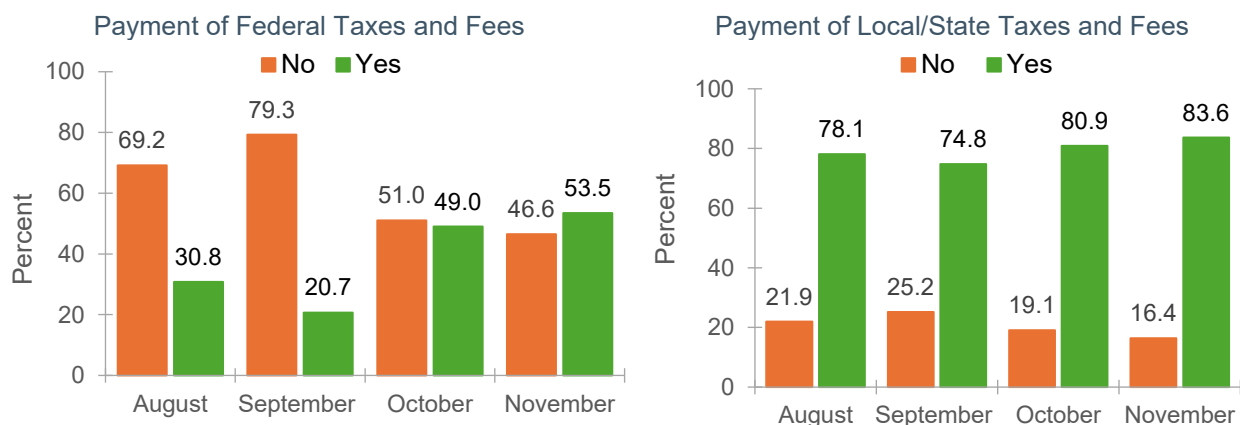
Taxes and Fees

Merchants in 15 of Sudan's 18 states continued to report payments of taxes and government fees at both federal and state or locality levels. In November, 53.5 percent of merchants reported paying

federal taxes and fees, up from 49 percent in October. The most common federal payments included value-added tax on tradable goods, trade licenses, annual profit taxes, and customs duties.

Payments at state and locality levels remained substantially higher than federal taxes. In November, 83.6 percent of merchants reported paying state and locality fees, compared to 80.9 percent in October. These fees are mainly related to market management and cleaning, local licensing, sanitation and health services, and Zakat. In parts of Darfur and Kordofan, merchants also reported irregular fees, often linked to market security and safety.

Figure 31: Percentage of merchants reporting payments of taxes and government fees (July-October 2025)



Significant state-level variation persists. Merchants in Northern, Blue Nile, and North Kordofan states accounted for the largest shares of federal taxpayers, while merchants in West Darfur and West Kordofan were most likely to report no federal tax payments. Among merchants paying federal taxes, 93.6 percent considered these payments beneficial for domestic trade, reflecting a notable improvement in perceptions. While concerns remain that high taxation reduces profit margins and raises prices, many merchants noted that federal taxes facilitate cross-state trade, ease the movement of bulk goods and cash, and support government revenue.

A similar pattern was observed for state and locality fees. Non-paying merchants in November were more concentrated in West Kordofan, Blue Nile, and North Darfur, while fee-paying merchants were most prevalent in Northern, White Nile, and West Darfur states. Among merchants who paid locality fees, 85.6 percent viewed these payments as beneficial for domestic trade.

Traders' Future Outlook

Most merchants reported stable expectations for the near term. In November, 62.9 percent of surveyed merchants planned to continue trading at current levels without changes in volume or location, up from 55.4 percent in October. The share of merchants intending to increase trading volumes declined slightly, from 28.7 percent in October to 26.7 percent in November, with most of these merchants concentrated in Blue Nile, Northern, and White Nile states.

Only small proportions of merchants planned adjustments to their activities. About 1.7 percent intended to change the type of goods traded, mainly in River Nile and West Darfur, while a similar share expected to reduce trading volumes, particularly in Gedaref and Red Sea states. Market relocation plans remained negligible at 1 percent. Uncertainty about future plans declined further, with 3.5 percent of merchants reporting uncertainty, down from 6.4 percent in October.

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