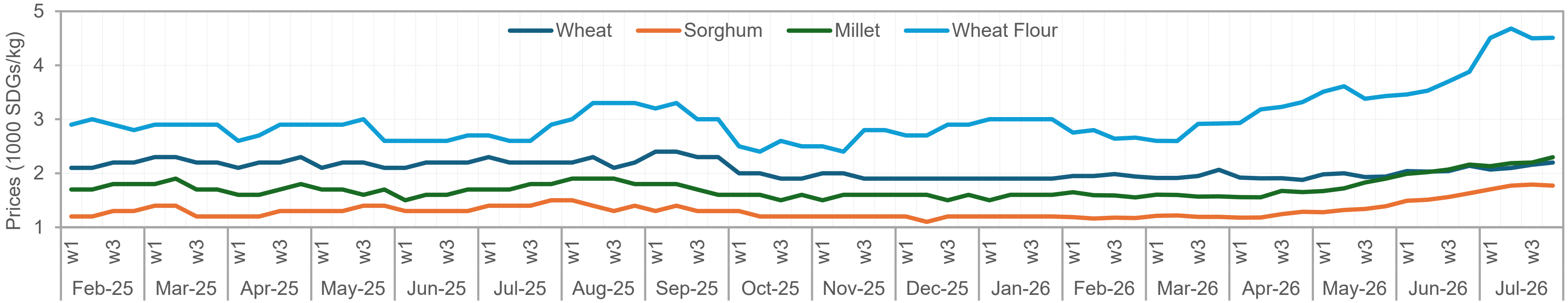
MARKET PRICES AND AVAILABILITY REPORT 18 July 2026

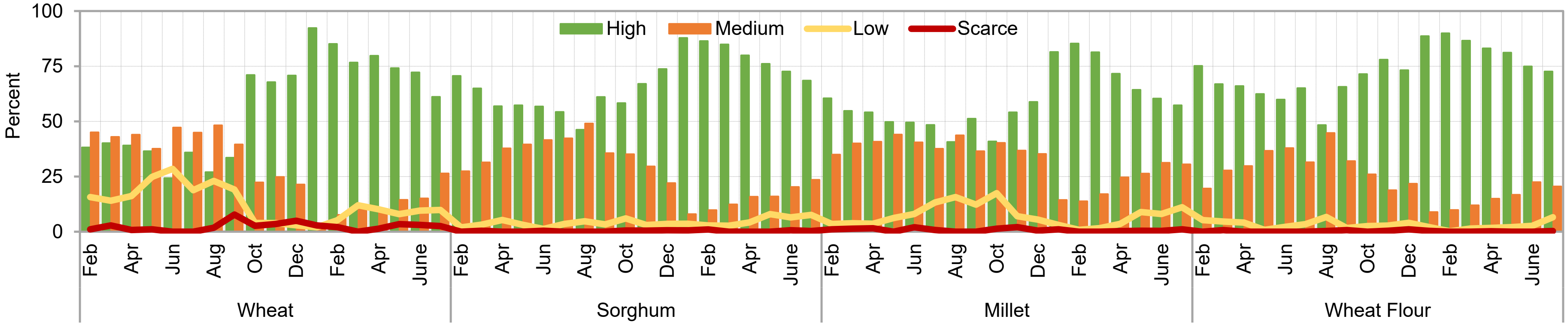
Essential Commodities Prices, Availability, and Market Actors' Perceptions

Cereals and Flour

The figure below shows the weekly average local prices of cereals and wheat flour (SDG/kg) from February 2025 to July 2026. Prices continued their upward trend in July 2026, with steady increases observed across all commodities, while wheat flour prices rose more sharply over the same period.



The figure below presents availability scores for cereals and wheat flour from February 2025 to July 2026. Perceived high availability of cereals and wheat flour continued to decline throughout June and July 2026 compared with May levels.

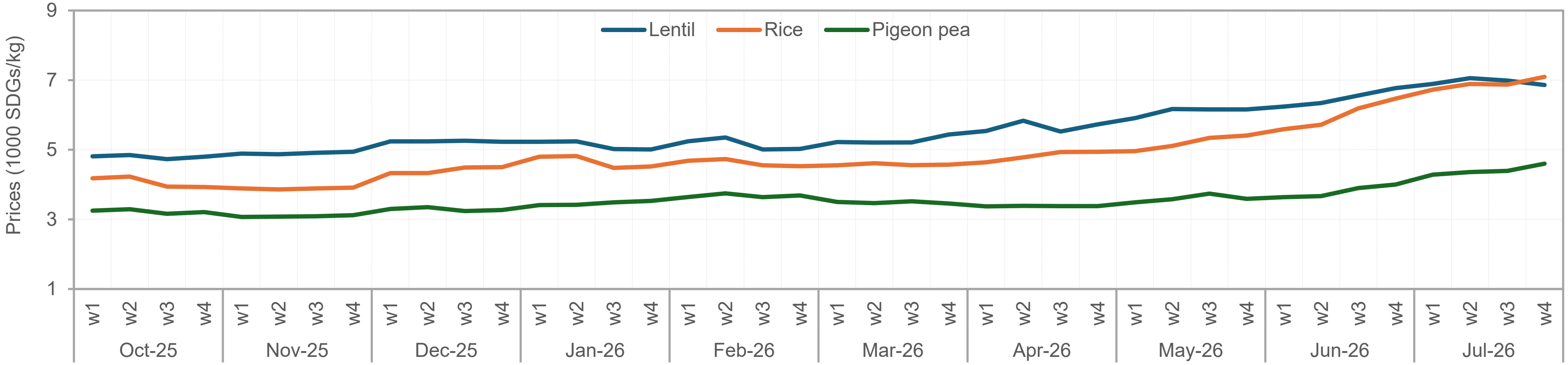


The June and July 2026 heatmap shows prices varying across states, with highest prices in most of Darfur states. Sorghum and millet prices were highest in West Kordofan, Khartoum and Northern states. Wheat flour prices relatively stable across states, but high in Darfur and West Kordofan states.

		Khartoum	Central Darfur	East Darfur	North Darfur	South Darfur	West Darfur	North Kordofan	South Kordofan	West Kordofan	Sennar	Al Gezira	Blue Nile	White Nile	Northern	River Nile	Gedaref	Kassala	Red Sea
Wheat	June	2.4		4.5	3.2	4.4	3.8	2.2			1.9	1.9	2.5	1.8	1.8	1.9	2.2	2.0	1.7
	July	2.7		5.4	3.0	4.0	3.9	2.6			2.5	1.9	2.8	1.9	1.7	2.0	2.6	2.1	2.0
Sorghum	June	2.0	0.9	1.6	1.6	1.2	1.2	1.6	1.8	2.1	1.3	1.7	1.1	1.3	2.1	1.7	1.3	1.8	1.7
	July	2.1	1.3	1.7	1.8	1.2	1.4	1.9	1.6	2.6	1.5	1.8	1.2	1.4	2.3	1.8	1.5	1.9	1.6
Millet	June	2.9	1.5	2.2	1.9	1.5	1.6	2.3	1.5	2.8	1.7	2.3	1.9	2.2	2.4	2.2	1.7	2.1	2.2
	July	3.1	1.6	2.3	2.1	1.5	1.8	2.4	1.4	3.5	1.9	2.4	2.1	2.5	2.9	2.8	2.1	2.2	2.8
Wheat flour	June	3.0	4.1	5.2	5.0	4.6	4.1	3.1	4.2	5.7	3.1	3.1	3.1	3.0	3.2	3.3	3.3	2.9	2.9
	July	3.2	5.3	7.5	5.8	6.5	5.1	3.2	4.3	6.5	4.0	3.3	3.7	3.5	3.9	3.5	3.7	3.3	3.5

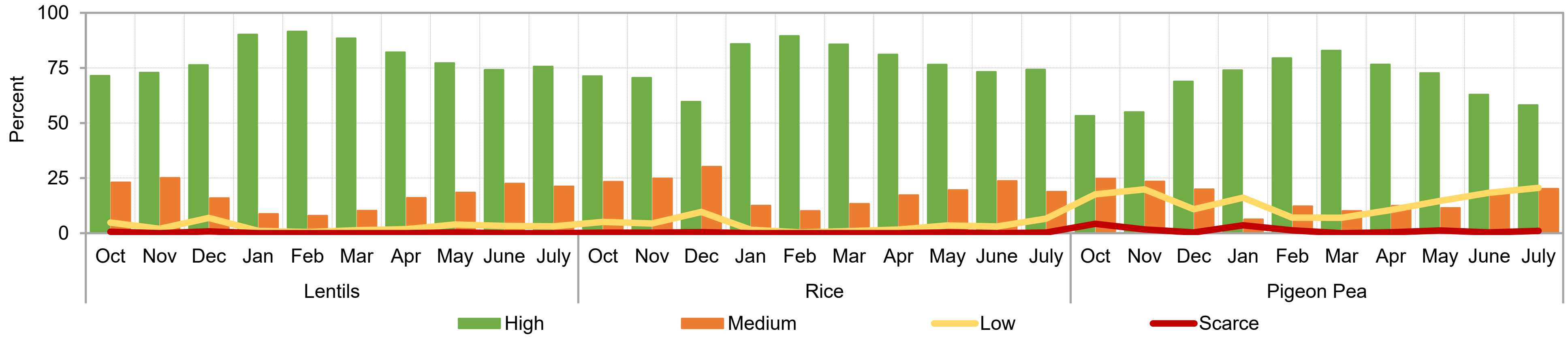
Lentils, Rice, and Pigeon Peas

The figure below shows weekly average local prices of lentil, rice, and pigeon peas (1,000 SDG/kg) from October 2025 to July 2026. Prices of all three commodities are higher in July than in June 2026.



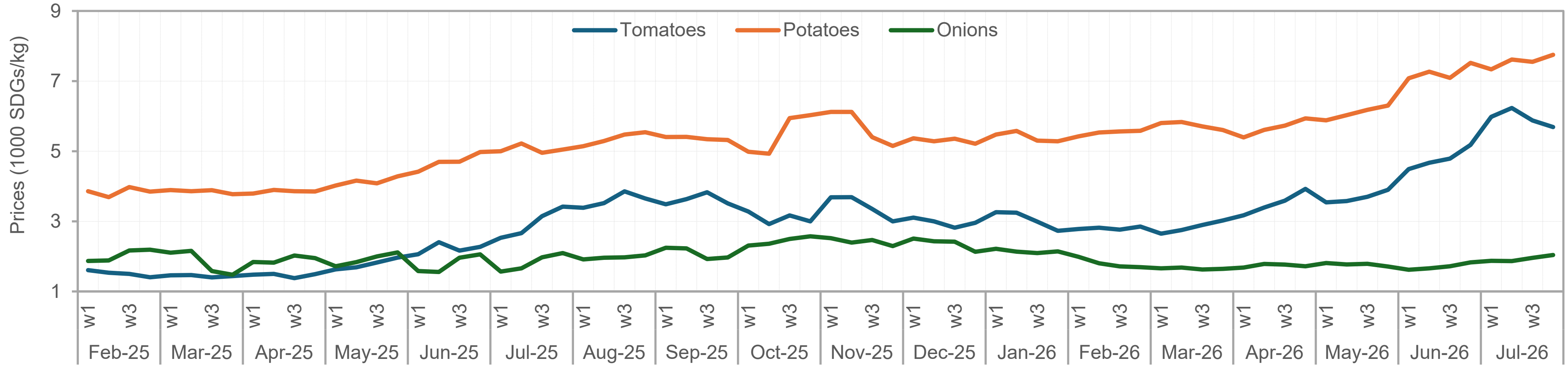
The heatmap below presents monthly average prices of lentils, rice, and pigeon peas across states (1,000 SDG/kg) during June and July 2026. Prices are higher in July in most of Darfur states and in West and South Kordofan than in other states. Rice prices were relatively high in Khartoum state too.

The figure below presents perceived availability scores for lentil, rice, and pigeon peas from October 2025 to July 2026. Since April 2026, the share of traders reporting "high" availability has declined across all three commodities, and this downward trend continued during May, June, and July 2026.

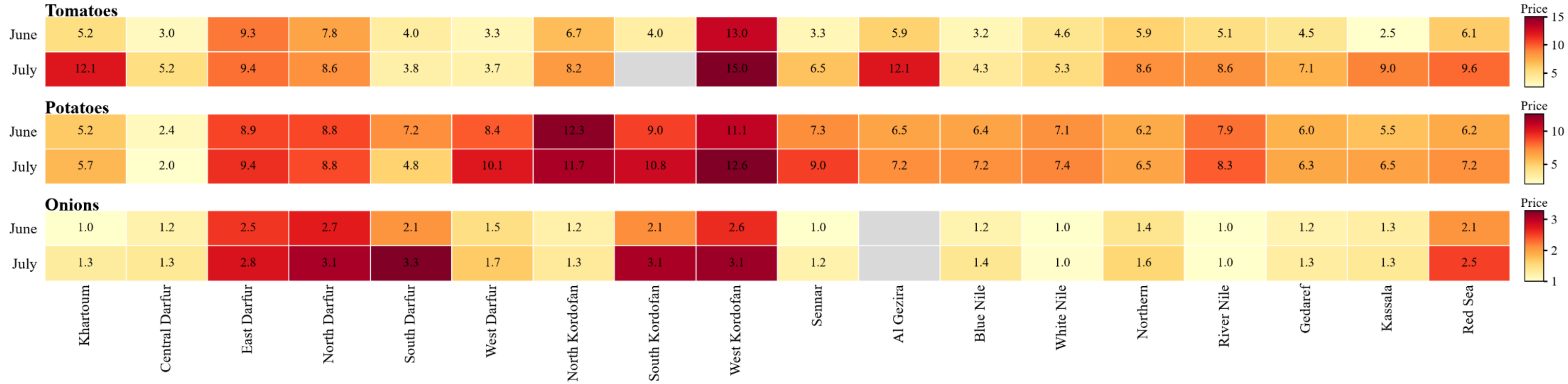


Vegetables

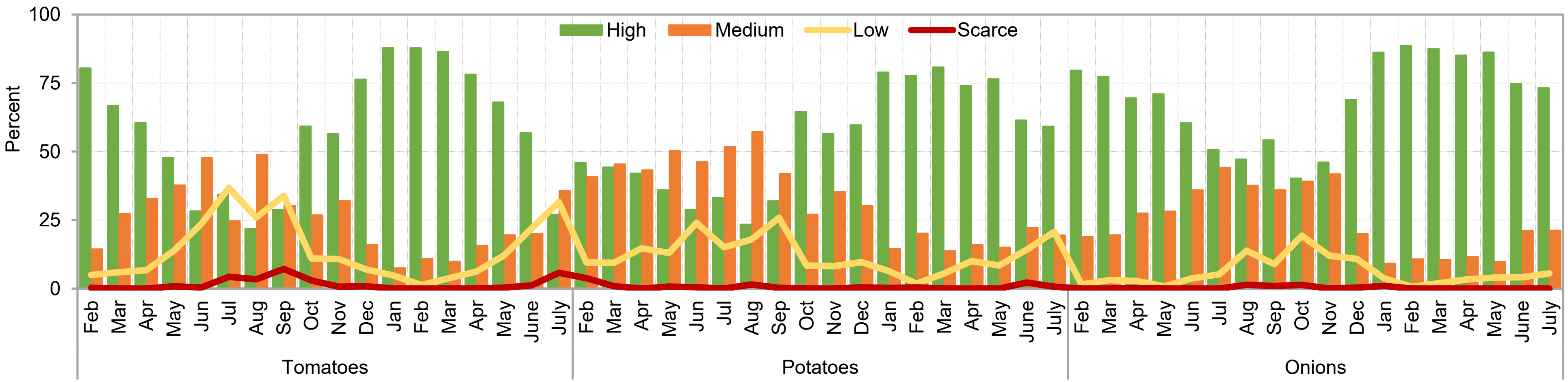
The figure below depicts weekly average vegetable prices (SDG/kg) from February 2025 to July 2026. Potato and onions prices increased gradually throughout June and July 2026. Tomato prices rose sharply in early July before declining in the last two weeks of the month.



The heatmap of monthly average vegetable prices across states (1,000 SDG/kg) in June and July 2026 shows that in July, tomato prices increased in most states and were highest in West Kordofan, Al Gezira, and Khartoum. Potato prices were highest across Darfur and Kordofan states, except Central Darfur, which recorded the lowest prices in both June and July. Onion prices were highest in South, North, and East Darfur and in South and West Kordofan states.

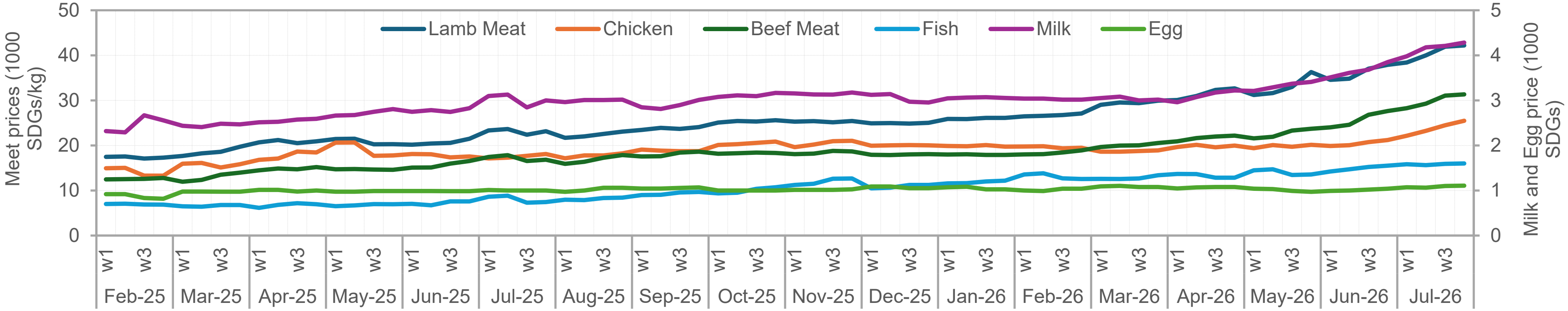


The figure below shows vegetable availability scores from February 2025 to July 2026, where the share of traders reporting high availability declined across all commodities in July 2026 compared with June, especially for tomatoes.

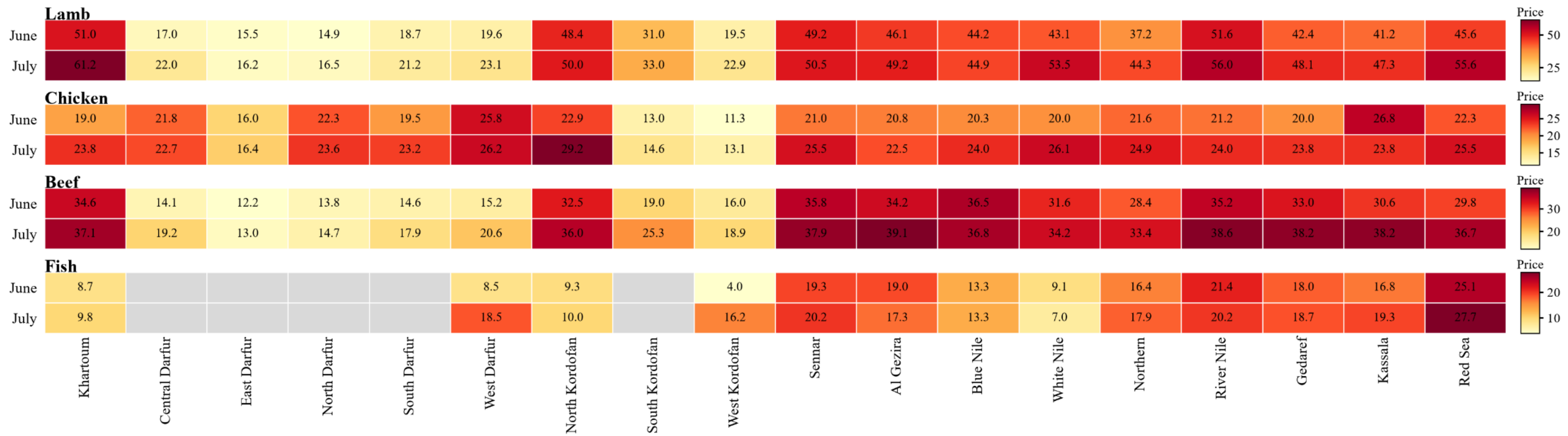


Meat and Animal Products

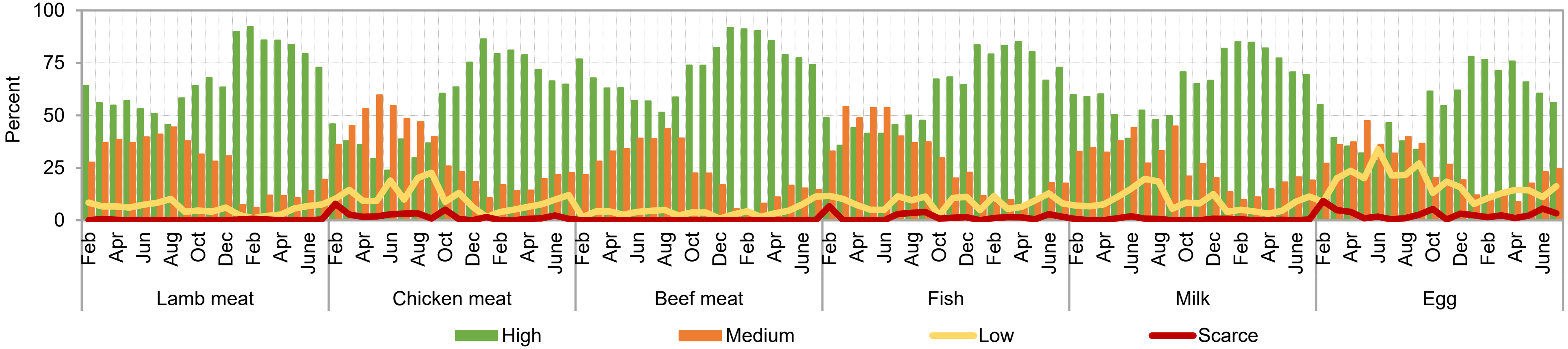
The figure below shows weekly average retail prices of meat and animal products (1,000, SDG/kg) from February 2025 to July 2026. Similar to June, 2026, prices increased across all products in July 2026.



The retail prices heatmap of meat and animal products across states (1,000, SDG/kg) in June and July 2026, shows that in July, the Darfur states continued to record lower lamb and beef prices than other states, while chicken and dish prices were higher in North Kordofan and Red Sea states, respectively.

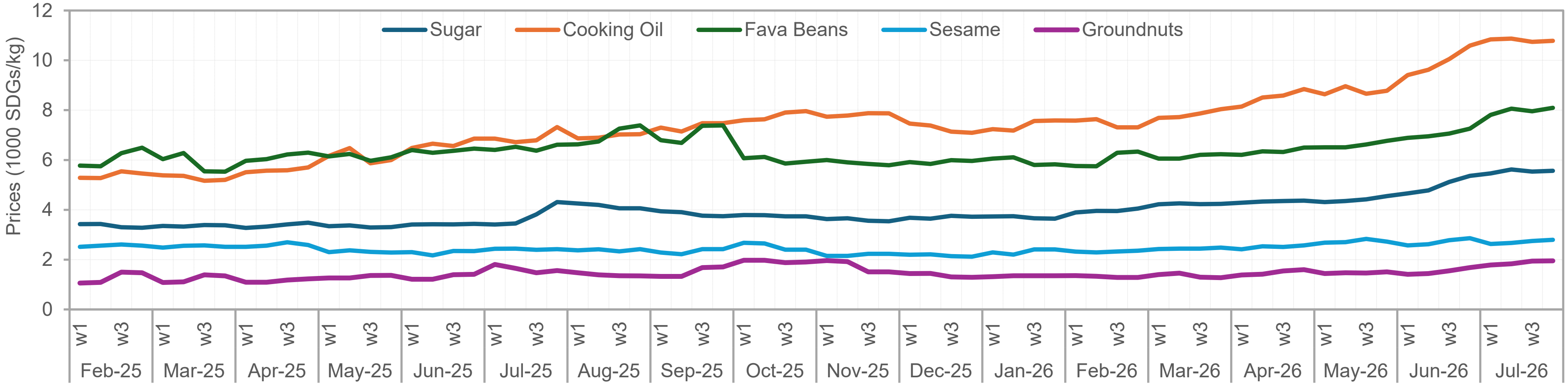


The share of traders reporting “high” availability of meat and animal products continued to decline across all commodities in July 2026 compared to previous months.

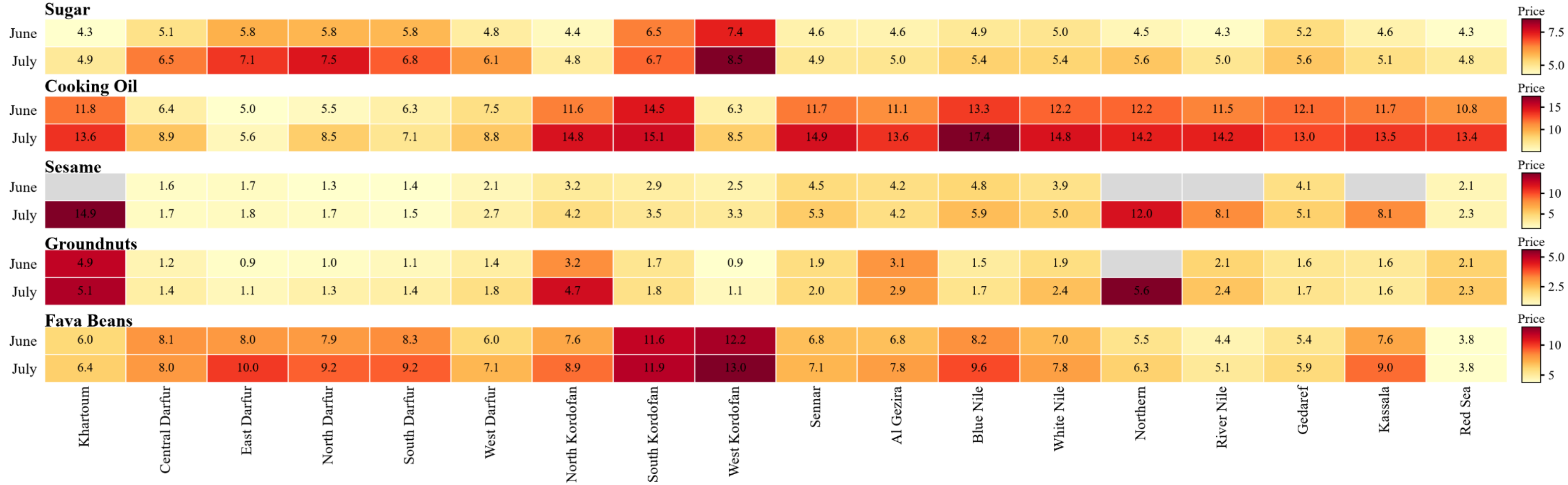


Oilseeds, Cooking Oil, Sugar, and Fava Beans

Retail prices of sugar, groundnuts, and fava beans (kg) and cooking oil (liter), 1,000, SDG, increased in July 2026 compared with June, while sesame prices declined slightly over the same period.

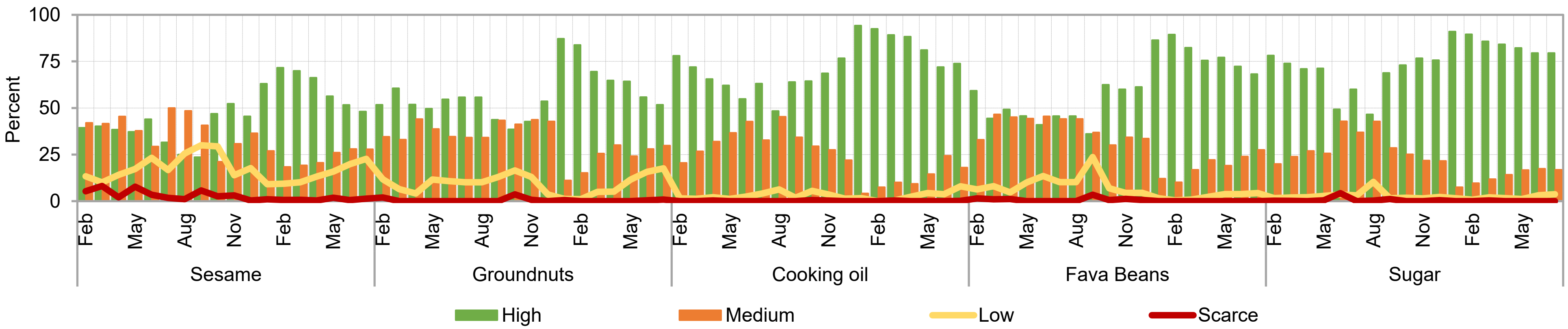


The heatmap presents prices of oilseeds, cooking oil, sugar, and fava beans across states (1000 SDG) in June and July 2026. During June and July, Darfur states recorded lower prices for cooking oil, sesame, and groundnuts but relatively higher prices for sugar and fava beans. Fava bean prices were highest in West and South Kordofan and lowest in Red Sea and River Nile.



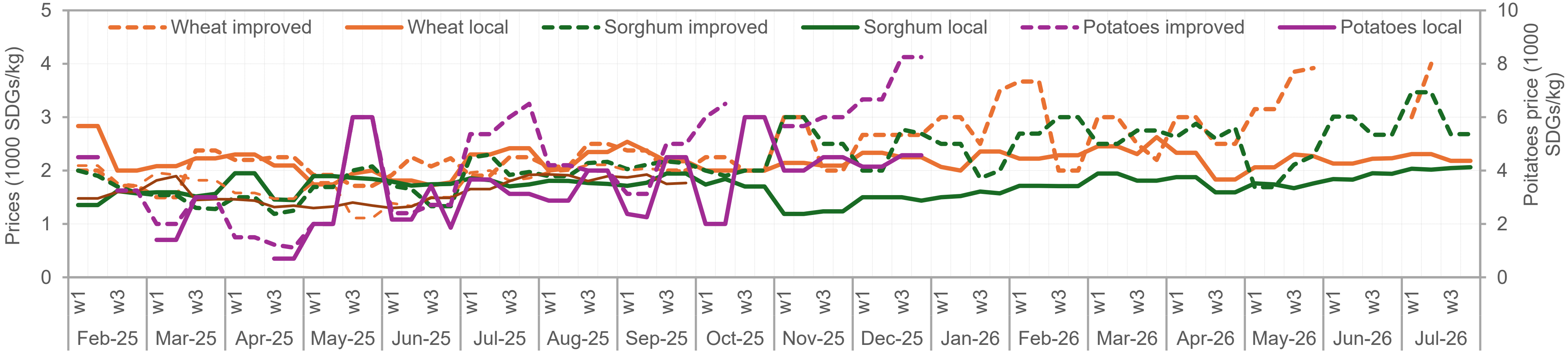
		Khartoum	Central Darfur	East Darfur	North Darfur	South Darfur	West Darfur	North Kordofan	South Kordofan	West Kordofan	Sennar	Al Gezira	Blue Nile	White Nile	Northern	River Nile	Gedaref	Kassala	Red Sea
Sugar	June	4.3	5.1	5.8	5.8	5.8	4.8	4.4	6.5	7.4	4.6	4.6	4.9	5.0	4.5	4.3	5.2	4.6	4.3
	July	4.9	6.5	7.1	7.5	6.8	6.1	4.8	6.7	8.5	4.9	5.0	5.4	5.4	5.6	5.0	5.6	5.1	4.8
Cooking Oil	June	11.8	6.4	5.0	5.5	6.3	7.5	11.6	14.5	6.3	11.7	11.1	13.3	12.2	12.2	11.5	12.1	11.7	10.8
	July	13.6	8.9	5.6	8.5	7.1	8.8	14.8	15.1	8.5	14.9	13.6	17.4	14.8	14.2	14.2	13.0	13.5	13.4
Sesame	June		1.6	1.7	1.3	1.4	2.1	3.2	2.9	2.5	4.5	4.2	4.8	3.9			4.1		2.1
	July	14.9	1.7	1.8	1.7	1.5	2.7	4.2	3.5	3.3	5.3	4.2	5.9	5.0	12.0	8.1	5.1	8.1	2.3
Groundnuts	June	4.9	1.2	0.9	1.0	1.1	1.4	3.2	1.7	0.9	1.9	3.1	1.5	1.9		2.1	1.6	1.6	2.1
	July	5.1	1.4	1.1	1.3	1.4	1.8	4.7	1.8	1.1	2.0	2.9	1.7	2.4	5.6	2.4	1.7	1.6	2.3
Fava Beans	June	6.0	8.1	8.0	7.9	8.3	6.0	7.6	11.6	12.2	6.8	6.8	8.2	7.0	5.5	4.4	5.4	7.6	3.8
	July	6.4	8.0	10.0	9.2	9.2	7.1	8.9	11.9	13.0	7.1	7.8	9.6	7.8	6.3	5.1	5.9	9.0	3.8

The share of traders reporting “high” availability of oilseeds, cooking oil, sugar, and fava declined in July 2026, continuing the downward trend observed since March, except for cooking oil for which the share increased slightly and for sugar where the share remained stable.



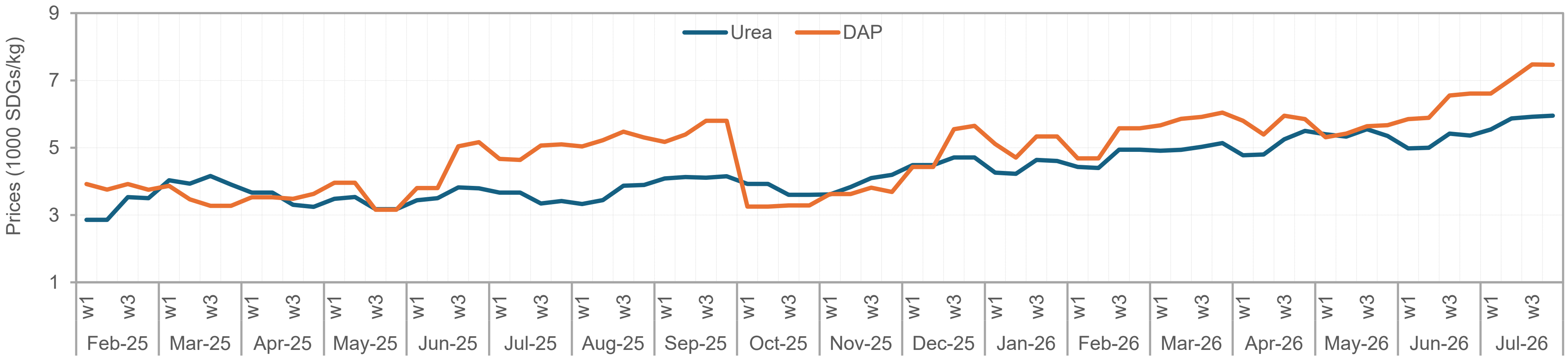
Seeds (Improved and Local)

Monthly average retail seed prices (1,000, SDG/kg) exhibited mixed trends between February 2025 and July 2026. In July, local wheat and sorghum seed prices remained broadly stable, while improved sorghum seed prices rose sharply early in the month before declining later.

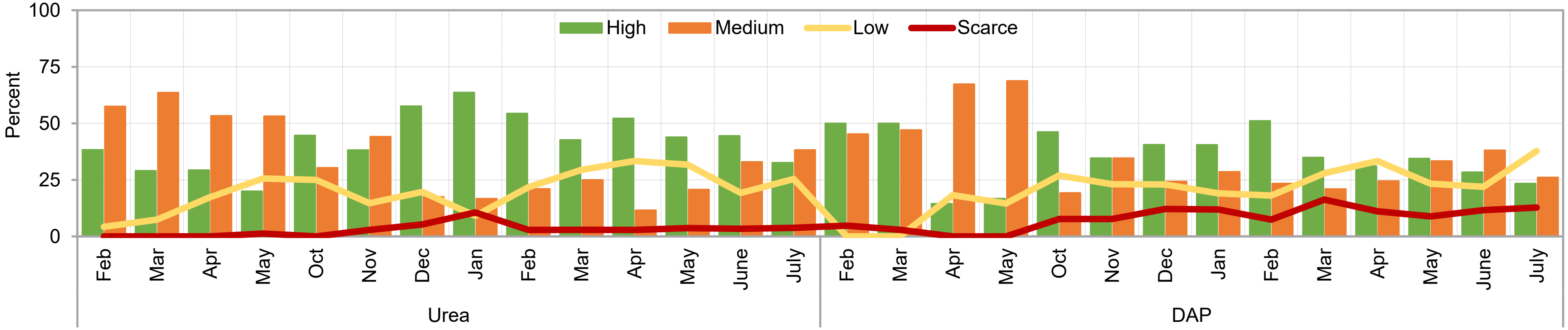


Fertilizers

Retail fertilizer prices (1,000 SDG/kg, monthly averages, February 2025–July 2026) continuously increased in June and July 2026.

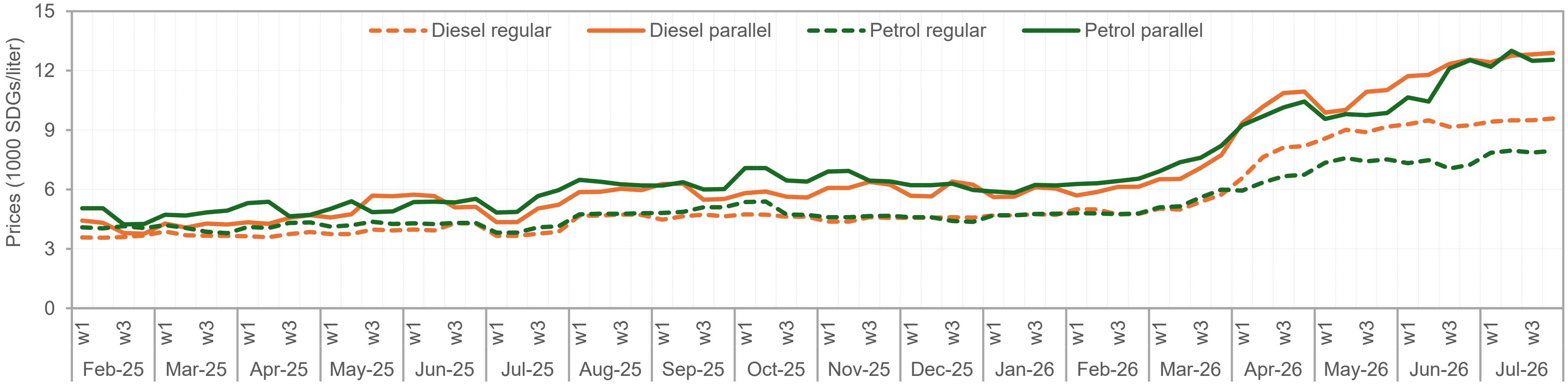


Perceived high availability scores (February 2025– July 2026) indicate that in July 2026, high availability of both urea and DAP declined substantially compared with June.

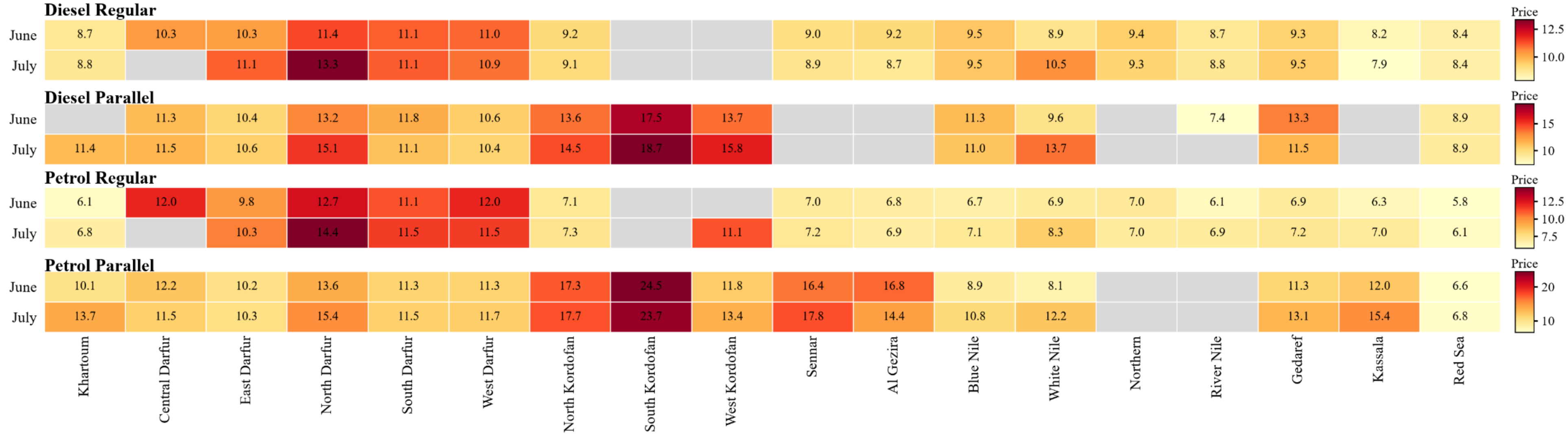


Diesel and Petrol

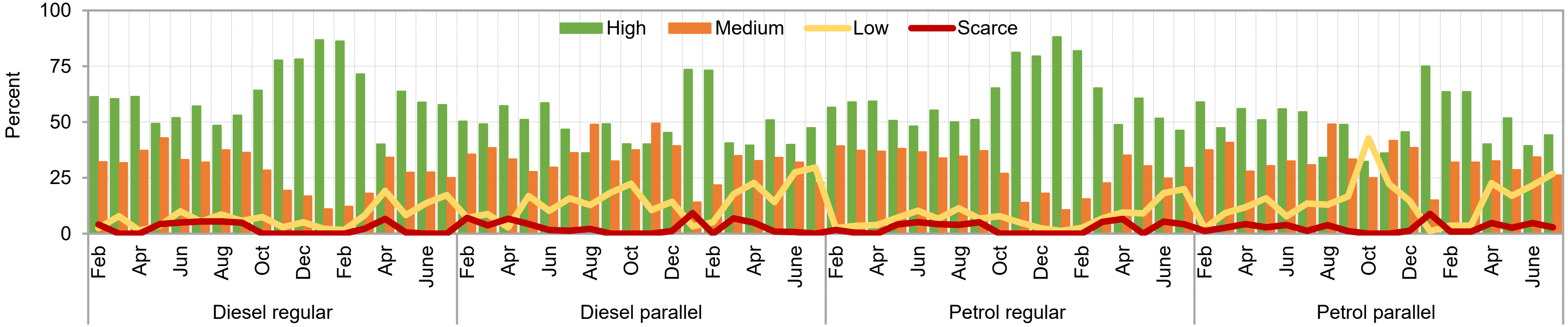
Retail fuel prices (SDG/liter, monthly averages, February 2025–July 2026) in parallel markets continued their upward trend throughout May, June and July 2026, although Petrol prices fluctuate frequently. Fuel prices in regular markets remained relatively stable in July 2026.



The heatmap of retail fuel prices across states (1,000 SDG/liter) from February 2025 to July 2026 shows that prices remained substantially higher in the Darfur and Kordofan states, especially in North Darfur, South Kordofan and North Kordofan than in other states.

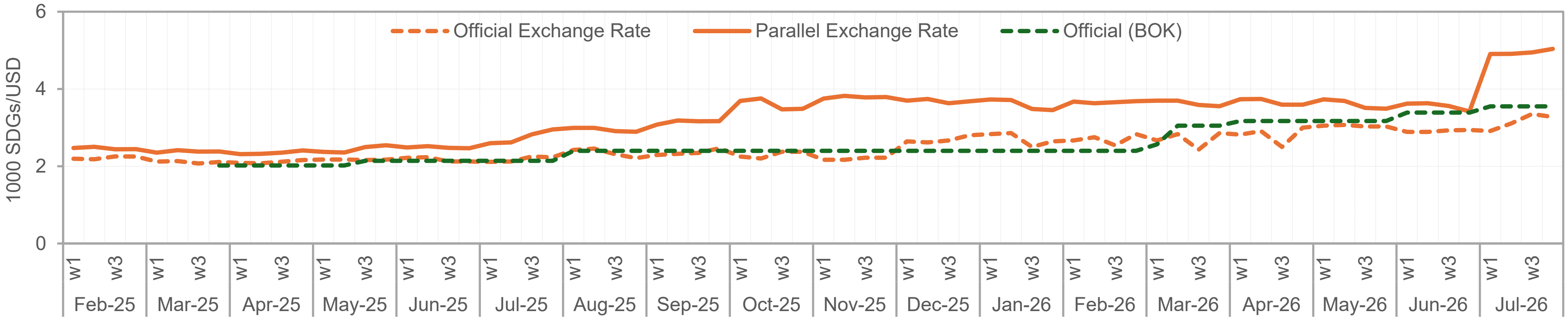


Perceived high-availability scores (February 2025–July 2026) for fuel increased in parallel markets and decreased in regular markets in July compared to June 2026.



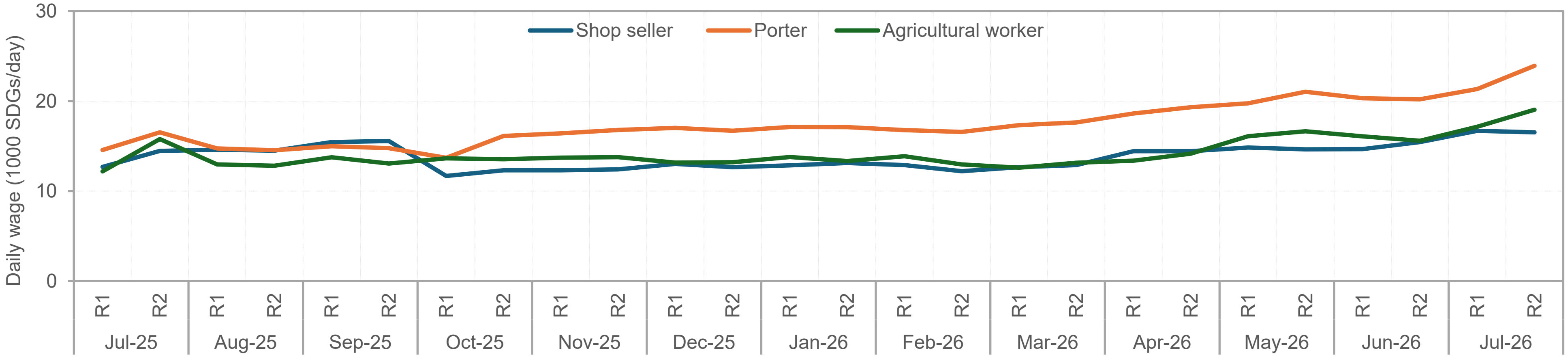
Exchange Rates

The parallel-market exchange rate (SDG per US dollar) increased sharply during July 2026 compared to June, the official exchange rate perceived by traders increased slightly, and the BOK rate remained stable in July 2026.



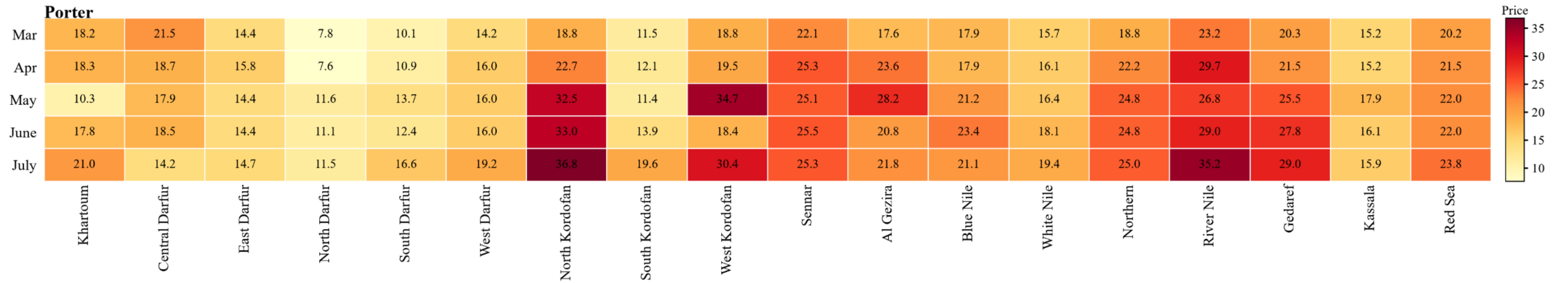
Labor wages

Labor daily wages (biweekly averages, SDG/day, July 2025–July 2026) remained highest for porters and increased in July 2026 compared to June. Agricultural workers' wages also increased, while shop sellers' wages remained stable over the same period.

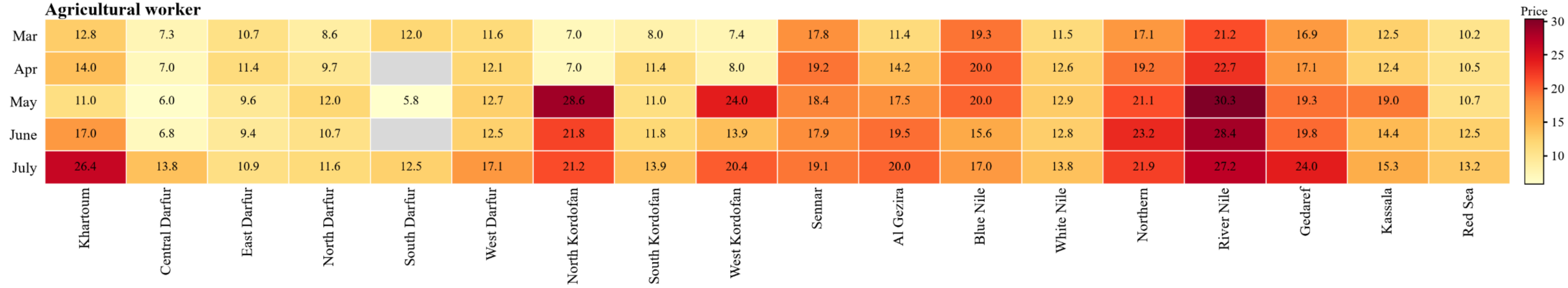


The heatmap of shop sellers' daily wages across states (1,000 SDG/day) from March to July 2026 shows that wages remained relatively stable over the period. However, daily wages were consistently highest in Central Darfur, followed by Northern, Gedaref, Sennar and Khartoum.

The heatmap of porters' daily wages across states (1,000 SDG/day) from March to July 2026 shows that wages remained largely stable over the period. In July 2026, wages were higher in North Kordofan, River Nile, Gedaref, and West Kordofan than in other states, while most Darfur states recorded lower wages.



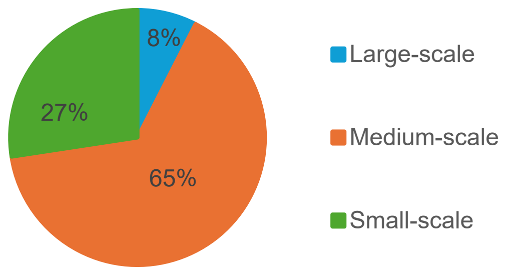
The heatmap of agricultural workers' daily wages across states (1,000 SDG/day) from March to July 2026 shows substantial variation across states in July. The highest wages were recorded in River Nile, Khartoum, and Gedaref. River Nile recorded the highest wages throughout the period, while the Darfur states recorded the lowest wages in July 2026.



Market Actors' Perceptions

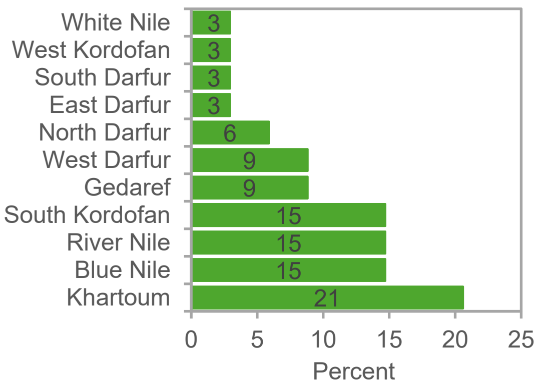
Size of merchants in the market

The distribution of merchants by trading scale (N=146) indicates that medium-scale traders account for 65 percent of all merchants and are primarily concentrated in Khartoum, Northern, and South Kordofan states. Large-scale traders are predominantly located in Khartoum and South Kordofan states, while small-scale traders are more common in Blue Nile, Northern, and North Darfur states.



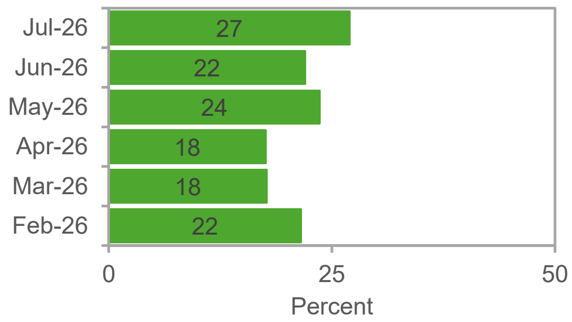
Supply Chain and Logistical Challenges Facing Merchants

In July 2026, 23 percent of merchants reported facing supply chain and logistical challenges (14 percent in June 2026). The highest proportion of reported challenges (N=34) was observed in Khartoum (21 percent), followed by Blue Nile, River Nile, and South Kordofan states, each accounting for 15 percent.



Changes in Demand Conditions

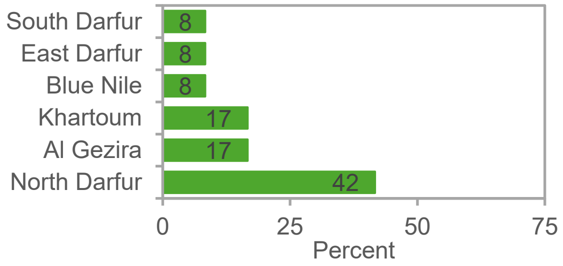
In July 2026, 27 percent of merchants reported changes in demand conditions (22 percent in June 2026). This indicates that demand-related challenges persisted during the reporting period.



Financial and Liquidity Constraints

In July 2026, 8 percent of merchants reported facing financial and liquidity challenges compared to 12 percent in June (N=12). Merchants in North

Darfur state comprise the highest proportion of merchants reporting financial and liquidity constraints (42 percent), followed by Al Gezira and Khartoum, each accounting for 17 percent.

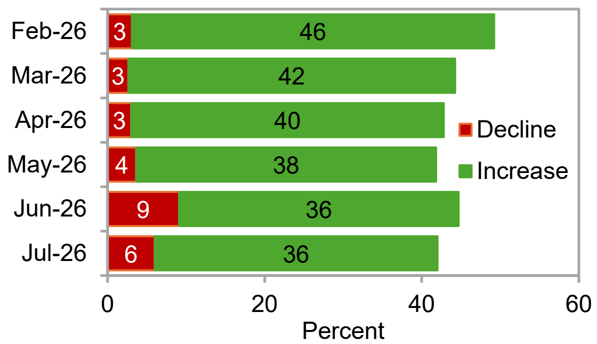


Storage and Power Access

The proportion of merchants reporting no storage constraints increased to 98 percent in July 2026, compared to 96 percent in June 2026.

Profits and Profitability Trends

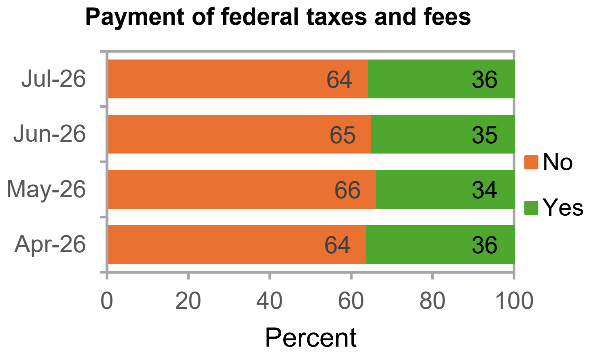
The share of merchants (February 2026–July 2026) reporting increased profit margins remained unchanged at 36 percent in July 2026, the same level recorded in June 2026.



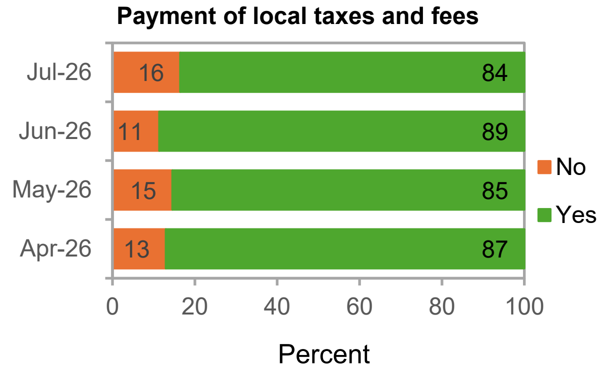
The highest shares of merchants reporting profit increases are in South Kordofan, White Nile, and Blue Nile states, while merchants in Northern, North Kordofan and Khartoum states report the highest shares of merchants reporting stable profit margins. Declines in profit margins were limited, however concentrated in North Darfur and to a smaller extent, Khartoum state.

Taxes and Fees

The share of merchants reporting payments of federal taxes and government fees (April 2026 – July 2026) increased marginally from 35 percent in June 2026 to 36 percent in July 2026. Most merchants reporting federal tax payments were in Northern, River Nile, and North Kordofan states.

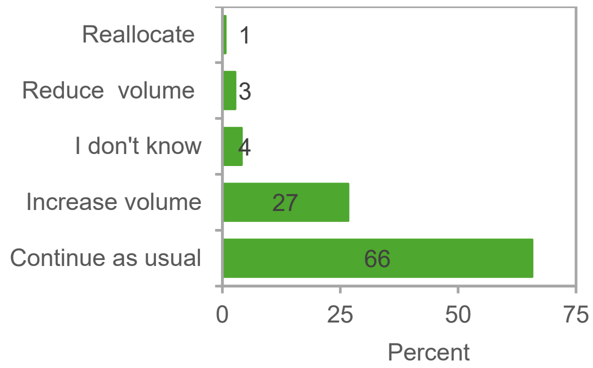


Similarly, the share of merchants paying state and locality-level fees decreased from 89 percent in June 2026 to 84 percent in July 2026, with most payments reported in Blue Nile and Northern states.



Traders' Future Outlook

Traders' outlook for the next 1–3 months (from July 2026) indicate that 66 percent of surveyed merchants plan to continue trading as usual, compared to 67 percent in June 2026, while 27 percent plan to increase the volume of goods traded, compared with 26 percent in June 2026. Merchants in South Kordofan, Blue Nile, West Kordofan, and Al Gezira states accounted for the highest share of merchants intending to increase trade volumes.



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