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Sudan: Cereal Markets and Trade

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Background

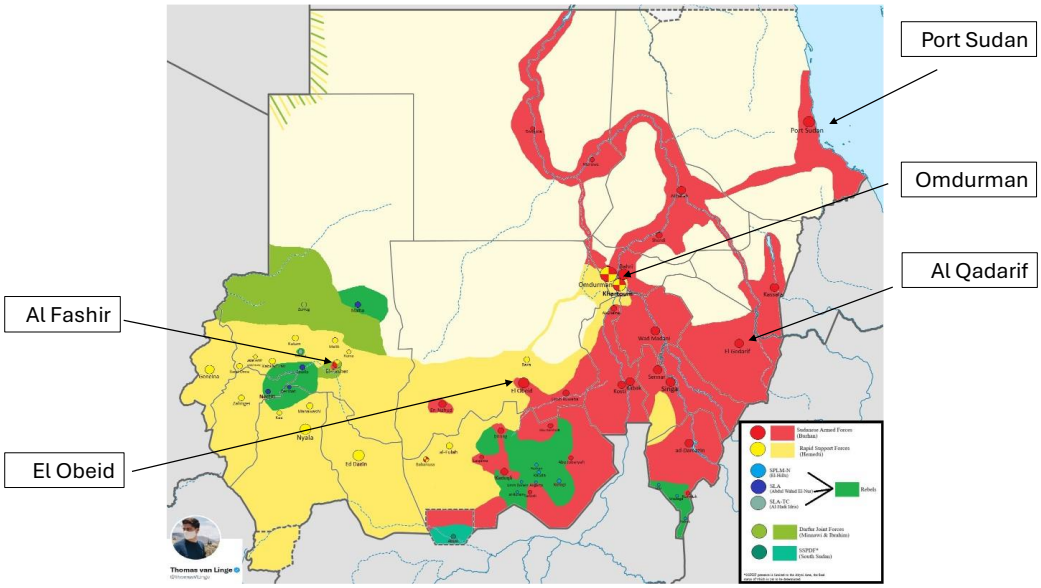
Cereal production and markets, key components of Sudan's food economy, have changed dramatically in the last decade due to conflict-related disruptions, as well as earlier changes in government policy. In western Sudan, particularly Darfur and surrounding regions, ongoing conflict has severely hindered agricultural activities, leading to a sharp decline in domestic cereal production. In contrast, other regions of Sudan have maintained relatively stable planting and harvesting activities, although marketing costs have risen substantially.

Cereal Production Patterns

Regional differences in production and consumption patterns have long existed in Sudan, driven largely by water availability. The current conflict has introduced an additional and dynamic regional factor, as control over cities and agricultural zones shifts between armed groups (Map 1). Wheat production in Gezira, a state largely under the control of the Rapid Support Force (RSF) in 2023/24, was only 144 thousand tons, marking a 59 percent decline from the -year average (2018/19–2022/23) of 353 thousand tons. Meanwhile, wheat production in the Sudan Armed Forces (SAF)-controlled Northern state stood at 104 thousand tons, which is 29 percent below its 5-year average.

Very little wheat is grown in western Sudan, where sorghum and millet, relatively more drought tolerant crops, are the major cereals. Nonetheless, poor rainfall and conflict contributed to a very sharp decline in sorghum production in many parts of western Sudan. Sorghum production fell by 91 percent in East, Central and West Darfur, from a 5-year average of 719 thousand tons to just 58 thousand tons in 2023/24 (FAO, 2024).

Map 1: Sudan: Regions controlled by various groups, January 2025



Source: van Linge (2025).

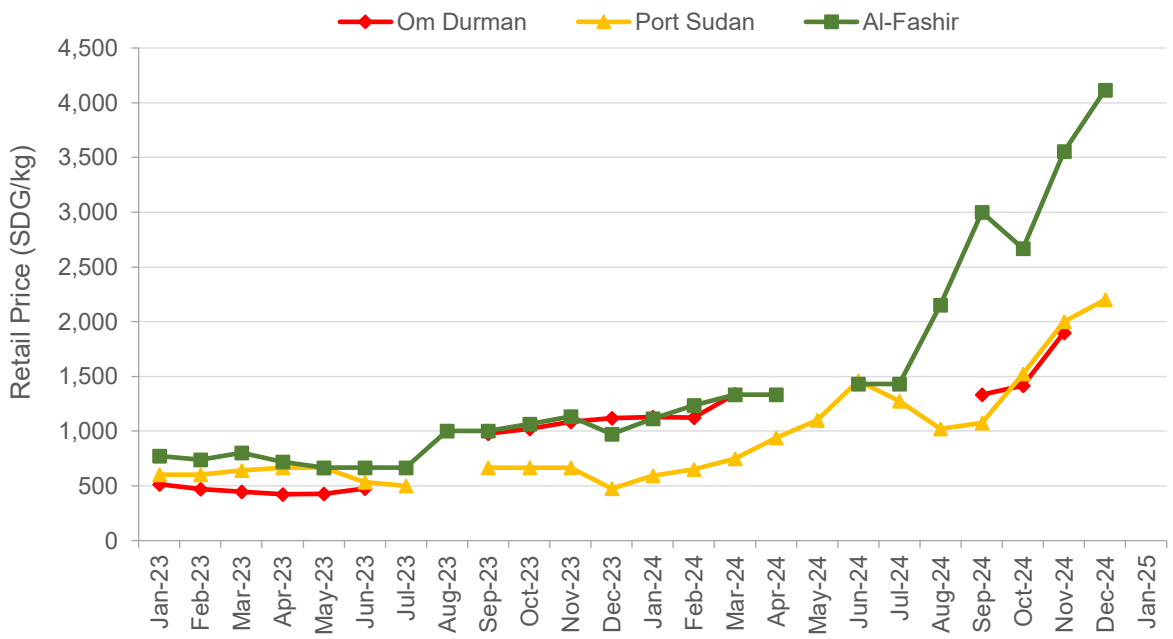
Cereal Market Price Movements

Econometric analyses of market price data from major Sudanese cities reveal that, prior to the onset of the conflict prices of wheat and sorghum moved together (i.e., prices in these markets were co-integrated). However, following the outbreak of conflict in April 2023, these price linkages between western and eastern Sudan weakened considerably.

Consistent with the decline in production (and limited wheat imports), retail market prices of both wheat and sorghum increased sharply from 2021 to 2024. Wheat prices rose particularly fast in Al-Fashir and El Obeid in western Sudan in 2024 reflecting increased marketing costs from Port Sudan and other parts of eastern Sudan to markets in western Sudan (Figure 1).

Thus, prices of wheat in Al-Fashir rose much faster than prices of wheat in Port Sudan. The retail price of wheat in Al-Fashir in western Sudan was 5.1 times higher in December 2024 than in March 2023 (SDG 4.12/kg and SDG 0.80/kg, respectively). By comparison, the retail price of wheat in Port Sudan in April 2025 was only 3.4 times higher than in March 2023 (SDG 2.20/kg and SDG 0.64/kg, respectively).

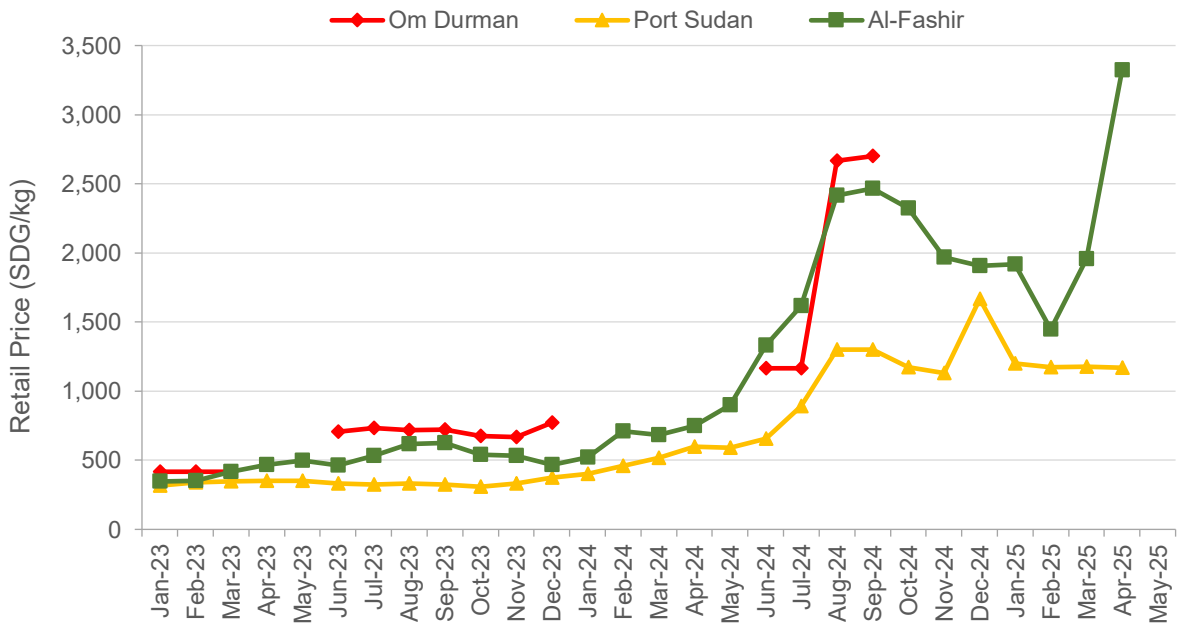
Figure 1: Retail wheat prices in various markets in Sudan (SDG/kg), 2023 - 2025



Source: Authors' calculations from WFP (2025) price data.

Overall, sorghum prices, while rising less steeply than wheat, also saw a significant surge across most markets (Figure 2). As with wheat, the increase in sorghum prices was sharper in Al-Fashir than in Port Sudan. In April 2025, the retail price of sorghum in Al-Fashir soared to SDG 3.32/kg, an eightfold increase from SDG 0.42/kg in March 2023. By comparison, sorghum prices in Port Sudan rose to SDG 1.17/kg in April 2025, a 3.4-fold increase from SDG 0.35/kg in March 2023.

Figure 2: Retails sorghum prices in various markets in Sudan (SDG/kg), 2023-2025



Source: Authors' calculations from WFP (2025) price data.

Impacts of Production Shocks and Market Disruptions: Model Simulations

To analyze the impacts of the conflict and other shocks on Sudan's wheat economy, we utilize a partial equilibrium model that includes separate equations for production, consumption, and prices of wheat in Eastern and Western Sudan. Given government controls on licenses and the risks of trade, the total level of imports is assumed to be fixed at the base year (2022) level, 2.1 million tons, equivalent to 85 percent of supply.

Simulation 1 shows the effect of increased marketing costs between East (which includes imports through Port Sudan) and West (a wheat deficit region). Wheat prices in western Sudan rise, but given a fixed level of imports, wheat prices in the East fall as less wheat is transported to the West. Wheat consumption in the West falls 15.6 percent; wheat consumption in the East rises 10.1 percent.

Building on Simulation 1, a second simulation incorporates the decline in household incomes in Western Sudan due to conflict-related disruptions in livelihoods and economic activity. This income shock leads to further reductions in wheat demand in the West, which in turn depresses prices further across both regions. Compared to Simulation 1, consumption in the East rises by an additional 5.2 percentage points, while consumption in the West falls by a further 8.0 percentage points.

Enhancing Food Security through Wheat Import Liberalization

Liberalization of the wheat import trade (e.g., by removing import licensing restrictions) may offer a promising avenue for enhancing national food security, especially during periods of domestic supply shocks. For example, in late 2024, domestic market prices of wheat rose above import parity price levels, due to domestic production shortfalls and restrictions on the volume of wheat imports. Removing restrictions on imports in this situation could have, in principle, added to the total supply of wheat in the country, reducing market prices to import parity levels, and leading to increased household wheat consumption.

This policy option is only feasible when market and security conditions in Sudan (including due allowance for the risks of the wheat trade) make private imports profitable. Moreover, it is essential to balance the interests of consumers with those of domestic producers, ensuring that price stabilization through imports does not undermine incentives for local wheat production. Nonetheless, price stabilization through liberalized external trade remains a relatively low-cost and effective tool for reducing price volatility, increasing wheat consumption and improving household food security.

Summary (Looking Ahead)

In the short term, if the conflict continues, continued humanitarian aid flows will be needed to help meet food security needs since households in conflict areas will likely lack the purchasing power to acquire sufficient food in the market. In the medium term, once the conflict ends, rebuilding markets infrastructure could help to lower marketing costs and thus raise incomes of wheat-deficit households. Moreover, such infrastructure investments also tend to raise the incomes of urban households and all farmers with marketable surpluses of other crops, thereby contributing to broader rural and urban economic recovery.

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