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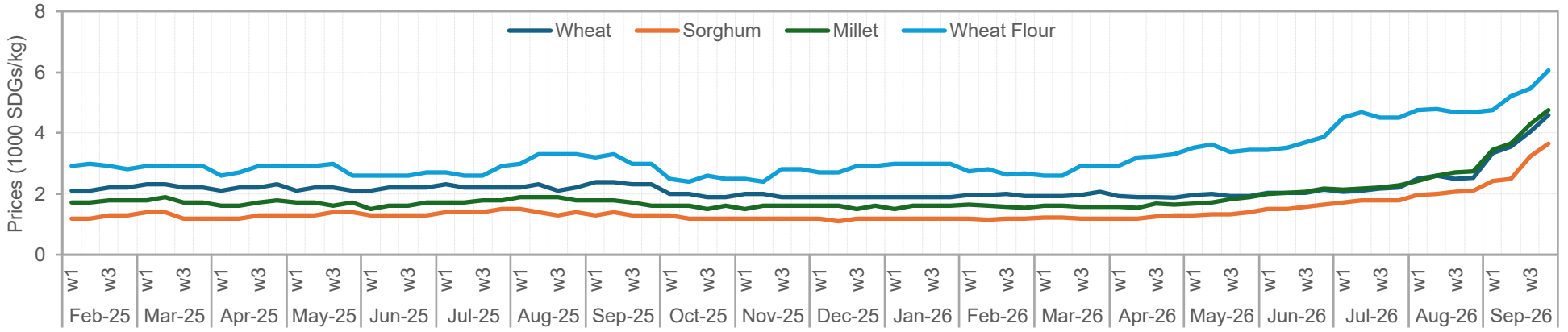
MARKET PRICES AND AVAILABILITY REPORT 20

September 2026

Essential Commodities Prices, Availability, and Market Actors' Perceptions

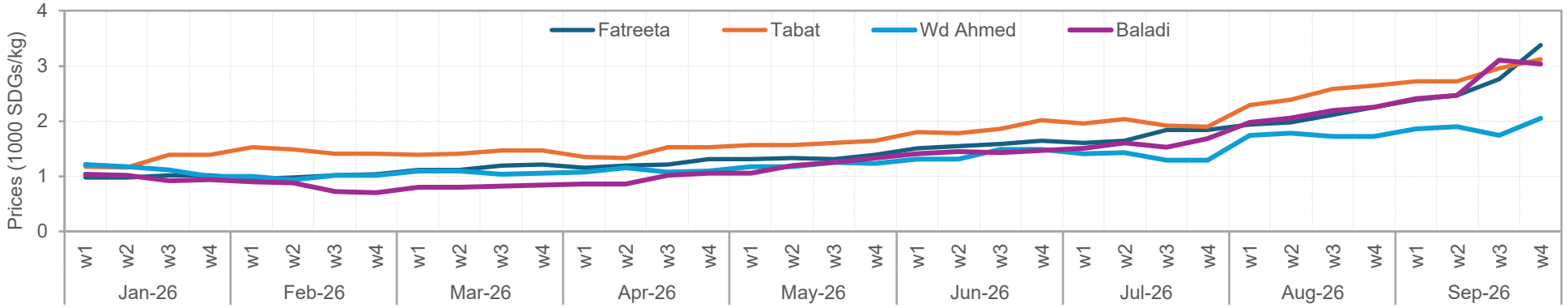
Cereals and Flour

The figure below shows weekly average local prices of cereals and wheat flour (SDG/kg) from February 2025 to September 2026. In September, wheat, sorghum and millet prices rose sharply, while wheat flour prices remained stable in the first week before rising steadily throughout the month.

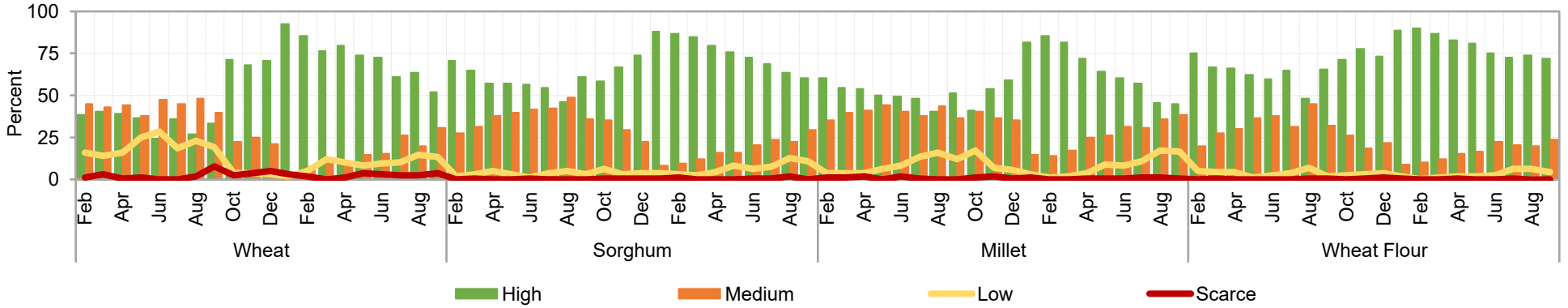


Sorghum Varieties

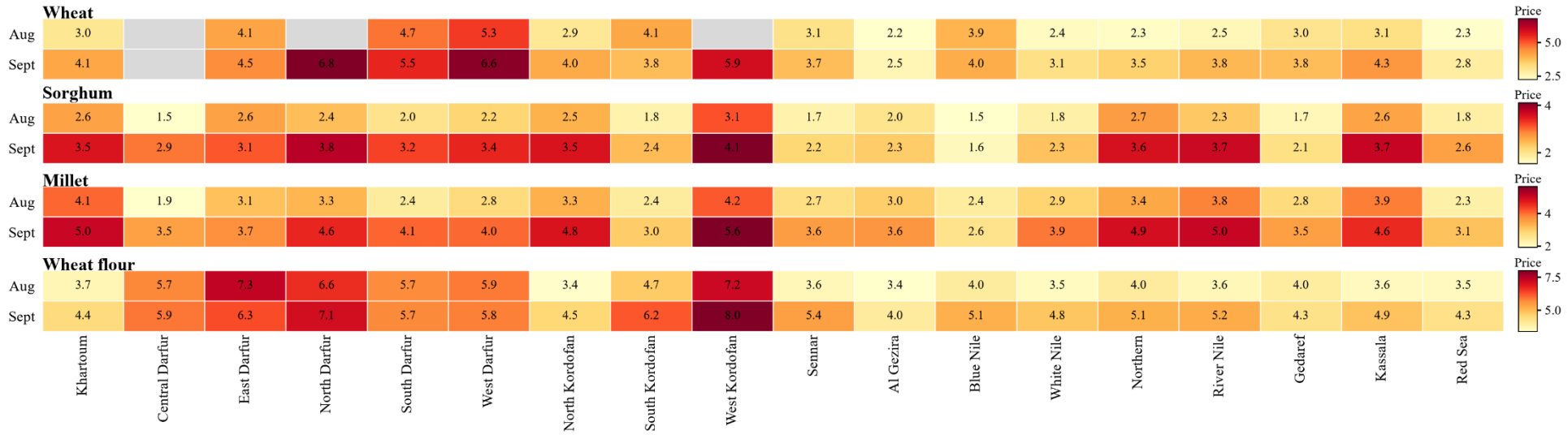
Prices of sorghum varieties (SDG/kg) increased in September. Wd Ahmed prices fluctuated slightly and remained the lowest among sorghum varieties.



The figure below shows traders' perceptions of cereal and wheat flour availability from February 2025 to September 2026. In September 2026, the share of traders reporting high availability declined for all four commodities compared with August, with the sharpest drop for wheat.

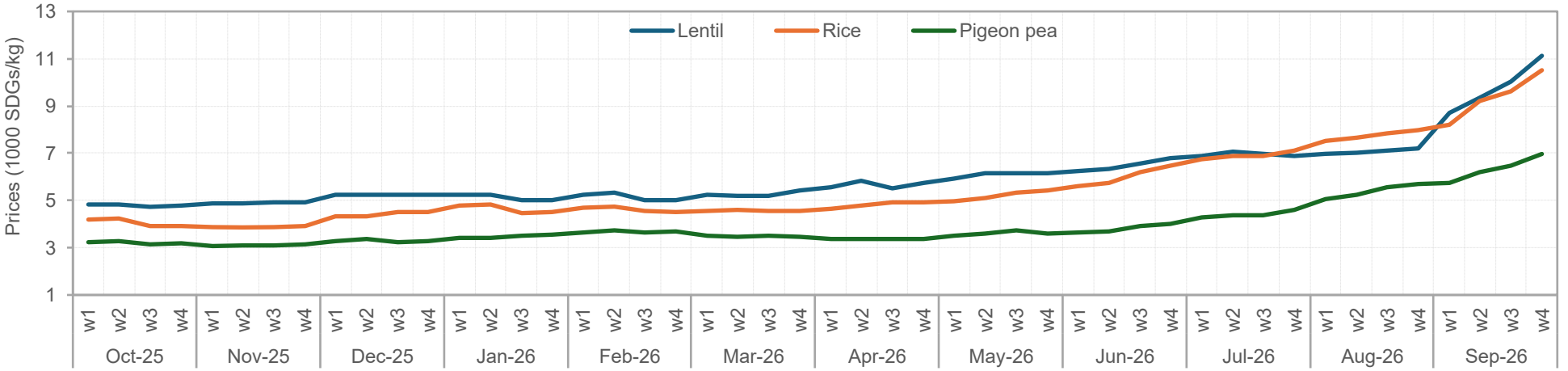


The heatmap shows substantial variation in cereal and wheat flour prices across states in August and September 2026, with prices rose in most states. Wheat prices were highest in North Darfur, West Darfur, and West Kordofan, while South Kordofan was the only state to record a decline. West Kordofan recorded the highest sorghum, millet, and wheat flour prices in both months.



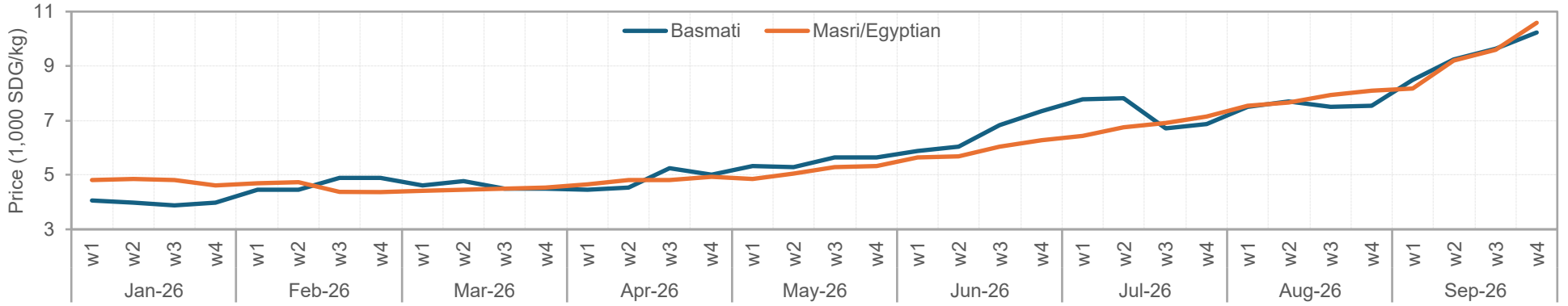
Lentils, Rice, and Pigeon Peas

The figure below shows weekly average local prices of lentils, rice, and pigeon peas (1,000 SDG/kg) from October 2025 to September 2026. Prices of all three commodities increased in September 2026 especially for lentils and rice.

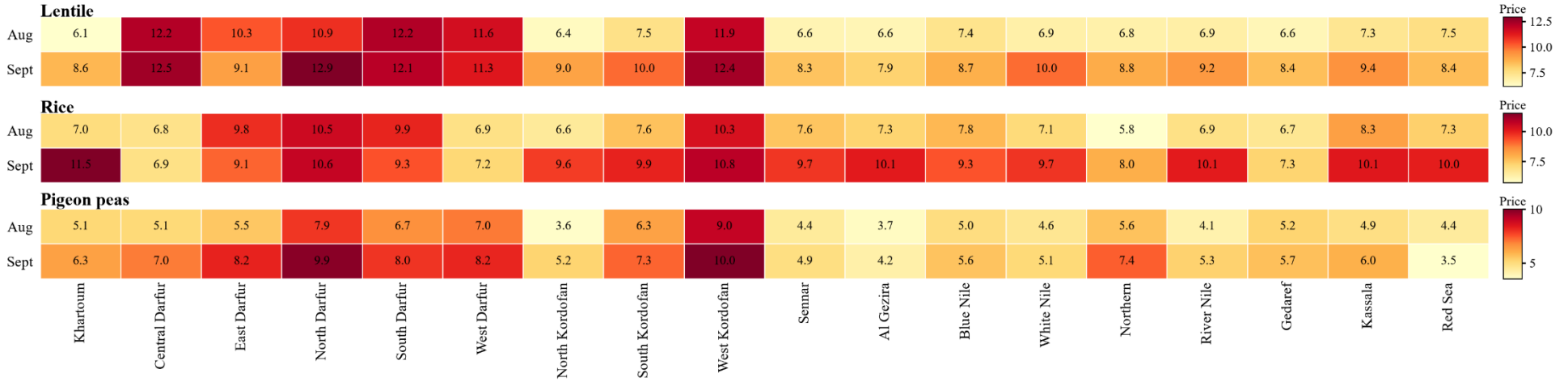


Rice Varieties

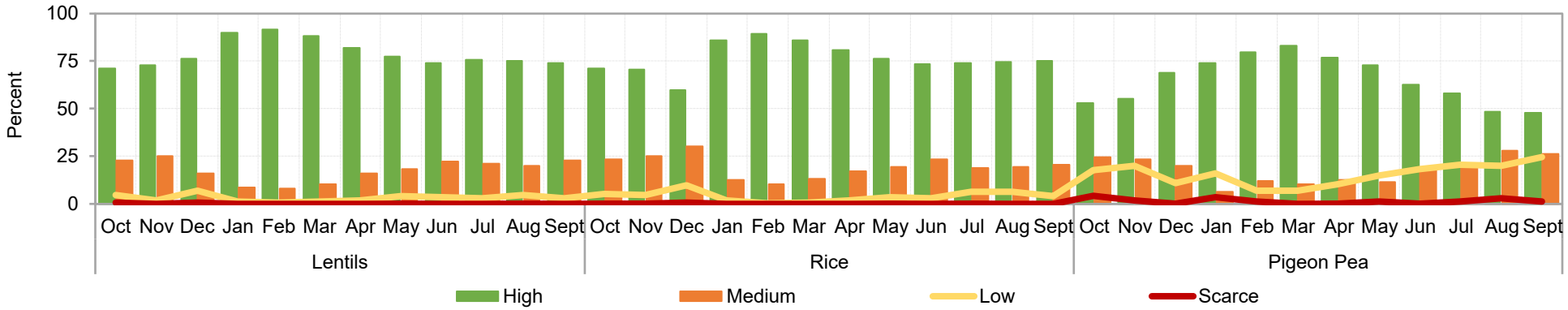
The figure below presents weekly average local prices of Basmati and Masri (Egyptian) rice (1,000 SDG/kg) from January to September 2026. Prices of both rice varieties increased steadily during August and September 2026, while the difference among them declined as compared June and July 2026.



The heatmap below shows monthly average prices of lentils, rice, and pigeon peas across states (1,000 SDG/kg) in August and September 2026. Prices were generally higher in several Darfur states, while West Kordofan recorded relatively high prices for all three commodities in both months.

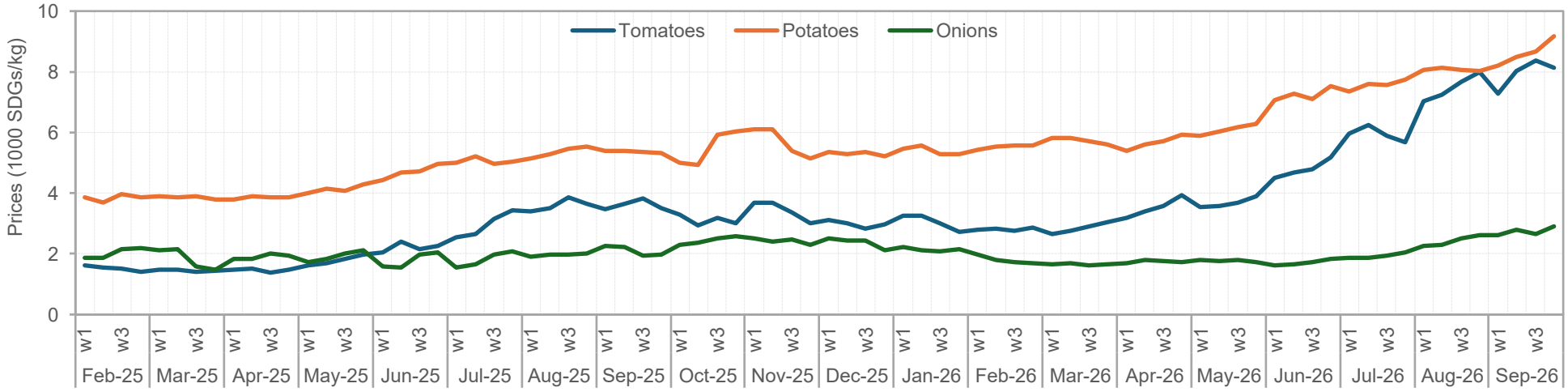


The figure below shows traders' perceptions of lentil, rice, and pigeon pea availability from October 2025 to September 2026. Since April, the share reporting high availability has generally declined, despite remaining largely unchanged between August and September 2026.

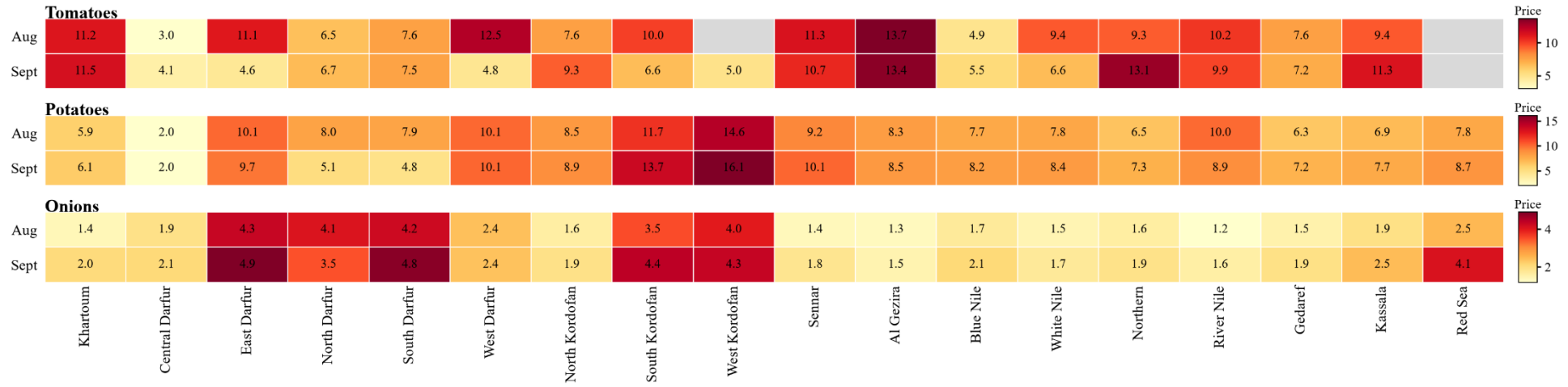


Vegetables

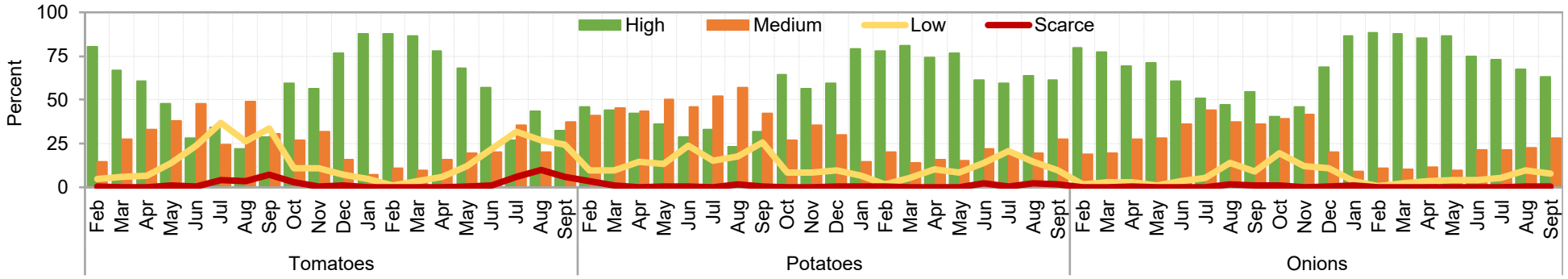
The figure below depicts weekly average vegetable prices (SDG/kg) from February 2025 to September 2026.In September, Potato prices continued to rise. Tomato prices fluctuated during September. Onion prices increased slightly and remained lower than tomato and potato prices throughout the period.



The heatmap compares vegetables prices across states in August and September 2026. The highest tomato prices were recorded in Al Gezira in both months, followed by Northern in September, while prices declined sharply in West Darfur, East Darfur, South Kordofan, and White Nile. The highest potato prices were recorded in West and South Kordofan, while price declines were observed in North, South, and East Darfur, and River Nile. Onion prices also rose in most states, with highest prices recorded in East and South Darfur, while Red Sea recorded a notable increase in September.

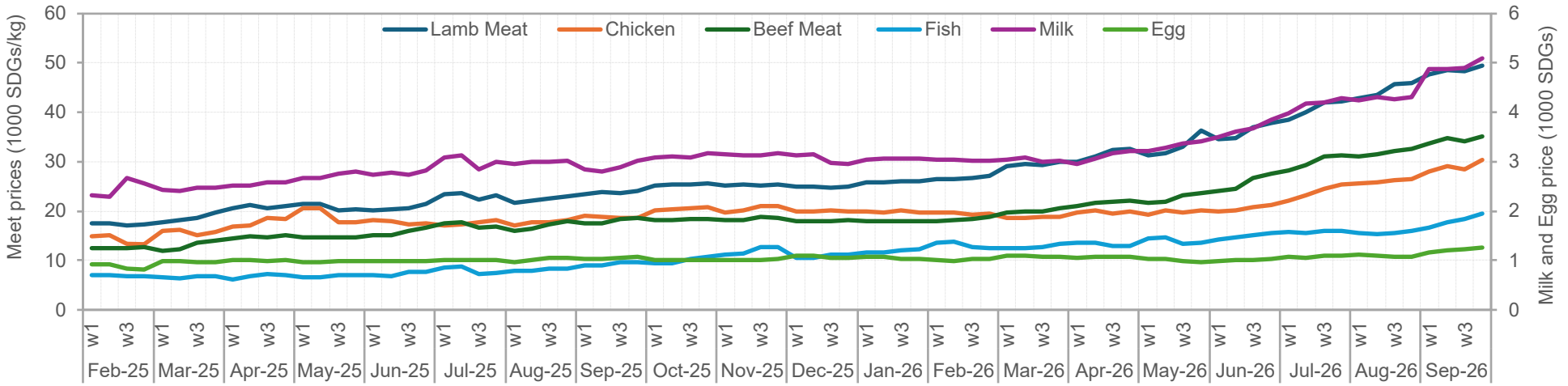


The figure below shows perceived vegetable availability from February 2025 to September 2026. In September 2026, the share of traders reporting high availability declined for all three vegetables compared with August, most notably for tomatoes, with smaller declines for potatoes and onions.

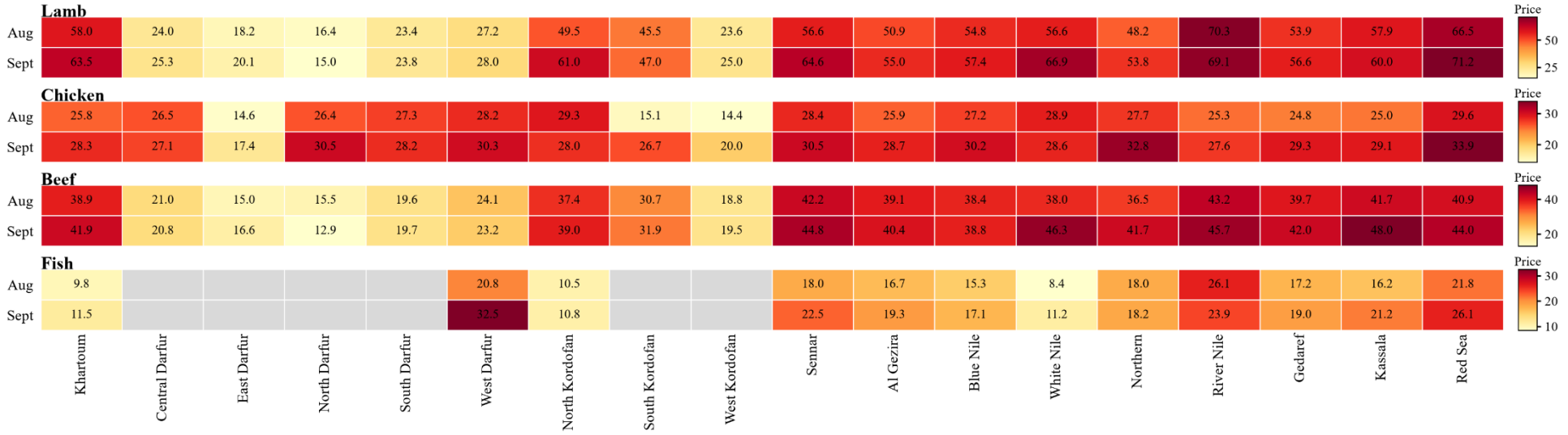


Meat and Animal Products

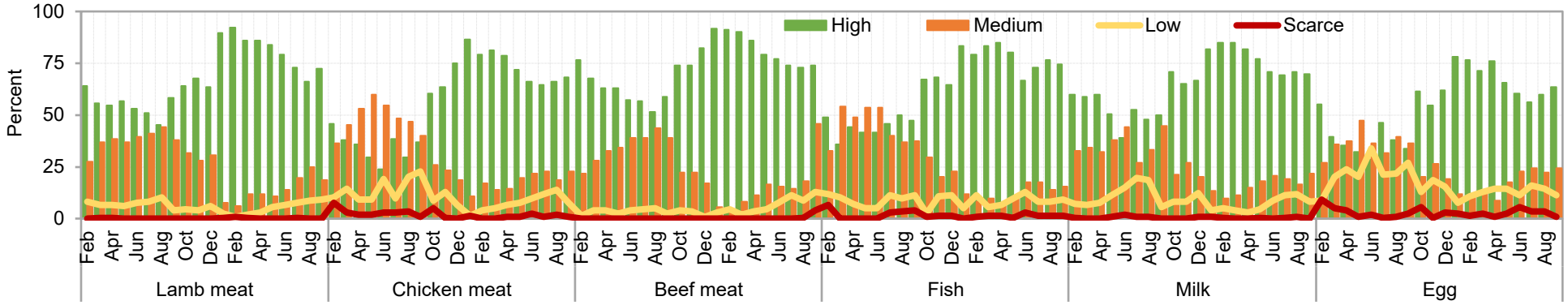
The figure below shows weekly average retail prices of meat and animal products (1,000 SDG/kg) from February 2025 to September 2026. Prices of the six animal products continued to rise through September, with egg prices remained relatively stable.



The heatmap compares lamb, chicken, beef, and fish prices across states in August and September 2026. Prices rose in most states with fish recording a sharp increase in West Darfur. In September, Red Sea recorded the highest lamb prices (River Nile was highest in August) and the highest chicken prices, Kassala the highest beef prices, and West Darfur the highest fish prices. Lamb and beef prices remained lower in Darfur and West Kordofan.

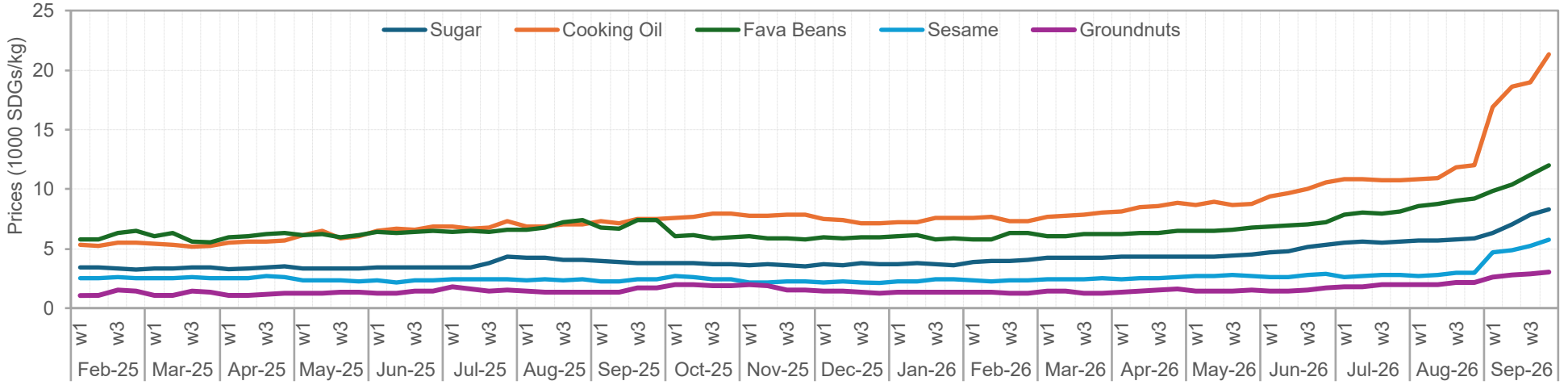


The share of traders reporting high availability of meat and animal products increased for lamb, chicken, beef, and eggs in September 2026 compared with August, while fish and milk declined slightly over the same period.



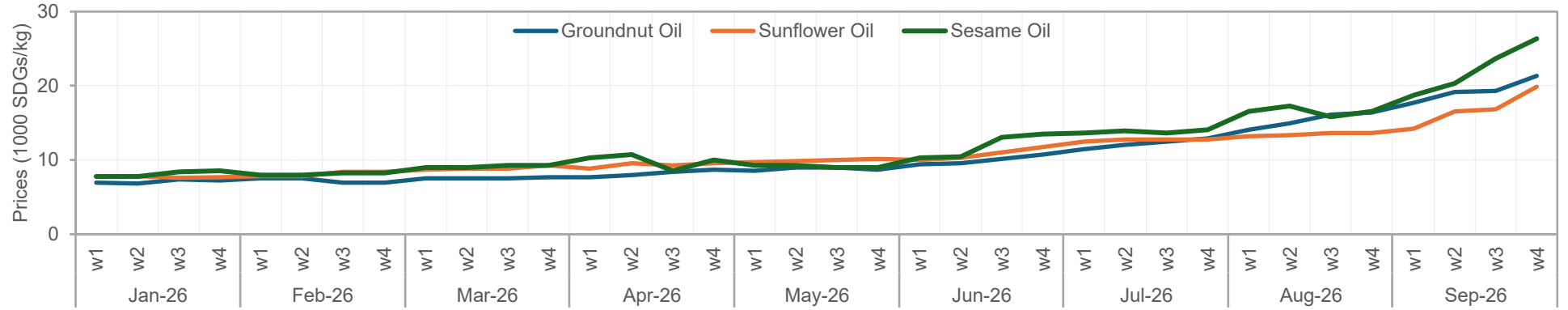
Oilseeds, Cooking Oil, Sugar, and Fava Beans

Retail prices of sugar, groundnuts, sesame, and fava beans (1,000 SDG/kg), as well as cooking oil (1,000 SDG/liter), continued to increase in September 2026. Cooking oil and sesame prices increased more sharply in September compared to the other commodities in the group.



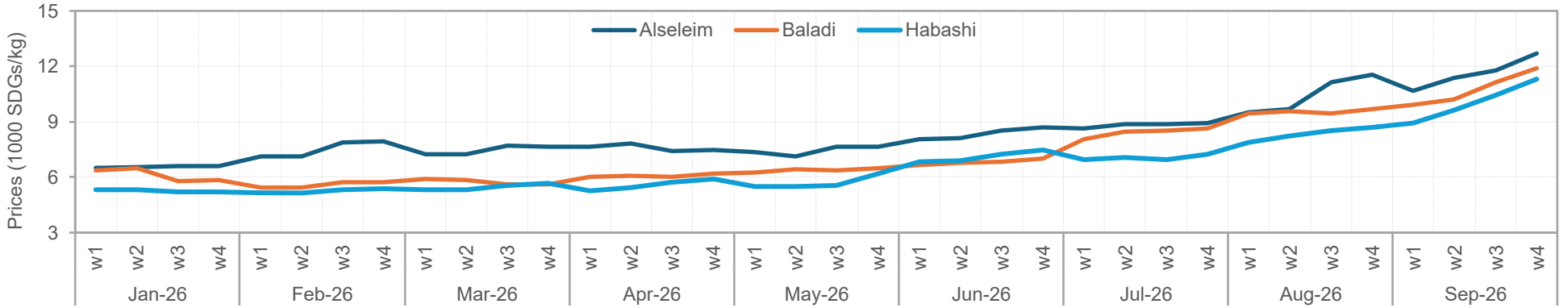
Cooking Oil Varieties

The figure below presents weekly average local prices of three varieties of cooking oil, namely, groundnut, sunflower, and sesame (1,000 SDG/liter) from January to September 2026. Prices for all three continued to rise, with sesame and sunflower oils recording sharper increases in September 2026.

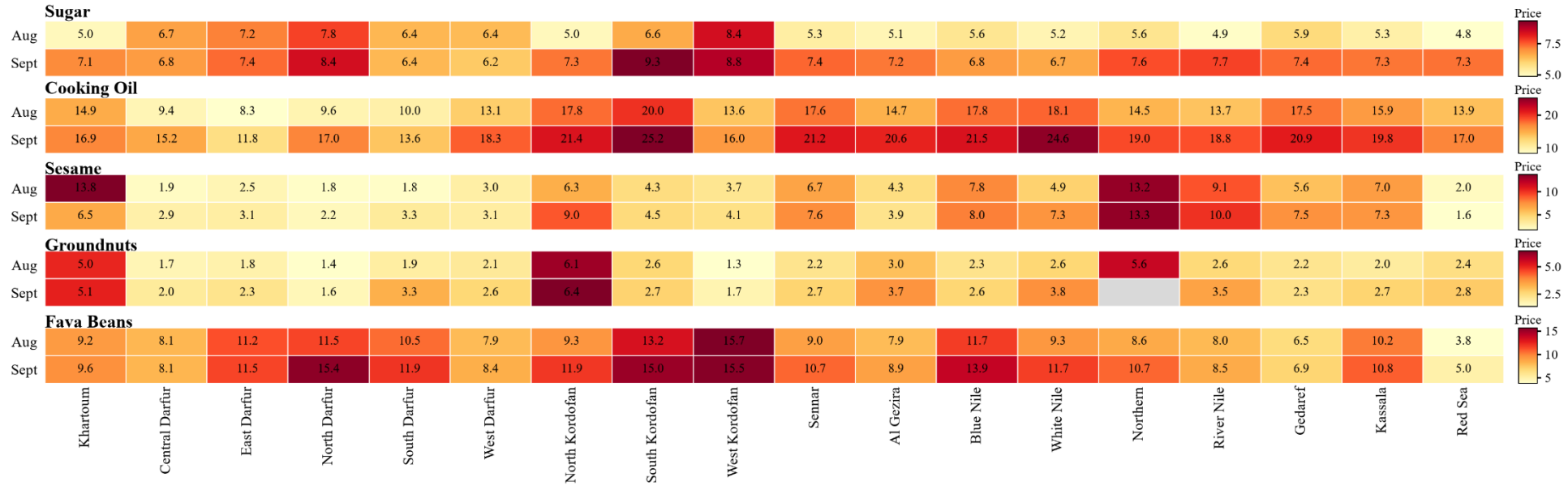


Fava bean Varieties

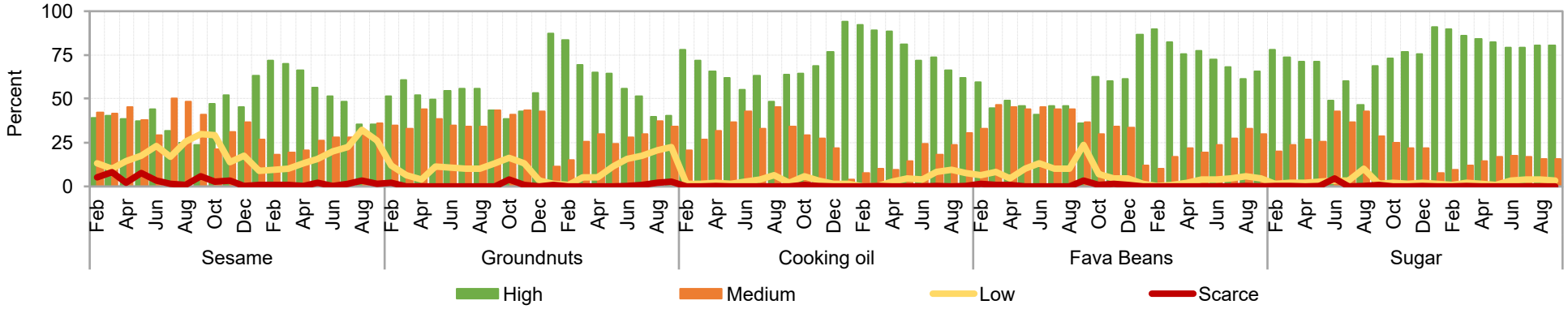
The figure below presents weekly average local prices of Alseleim, Baladi and Habashi fava bean varieties (1,000 SDG/kg) from January to September 2026. Prices of three varieties continued to increase, with Alseleim remaining the highest and recording a sharp rise during the second half of August 2026.



The heatmap presents prices of oilseeds, cooking oil, sugar, and fava beans across states (1,000 SDG) in August and September 2026. During this period, the Darfur states continued to record relatively lower prices for cooking oil, sesame, and groundnuts, but higher prices for sugar and fava beans. South Kordofan recorded the highest prices for sugar and cooking oil, while West Kordofan recorded the highest fava bean prices.

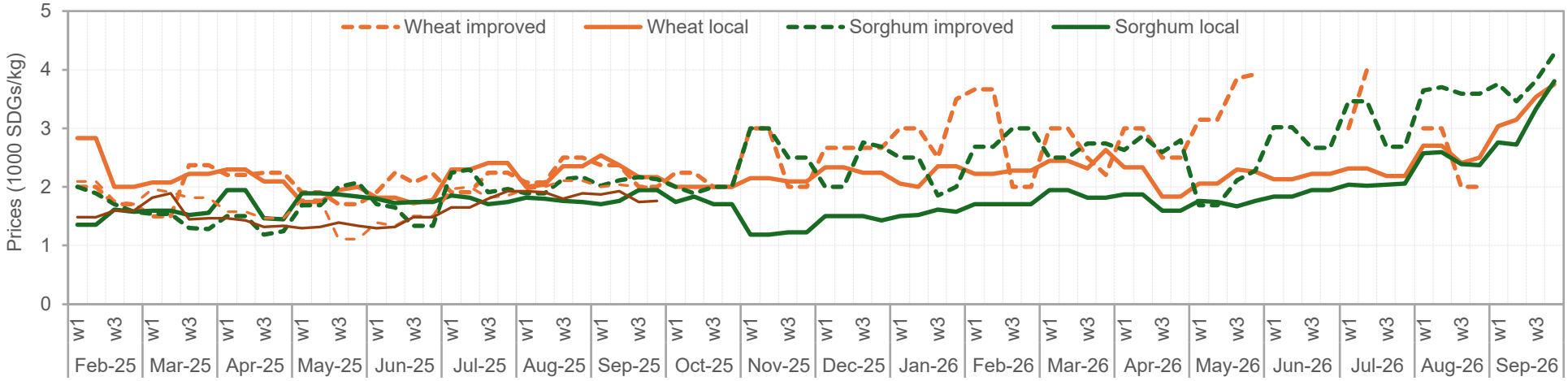


The share of traders reporting high availability increased for fava beans, remained stable for groundnuts and sugar, and declined for cooking oil in September 2026.



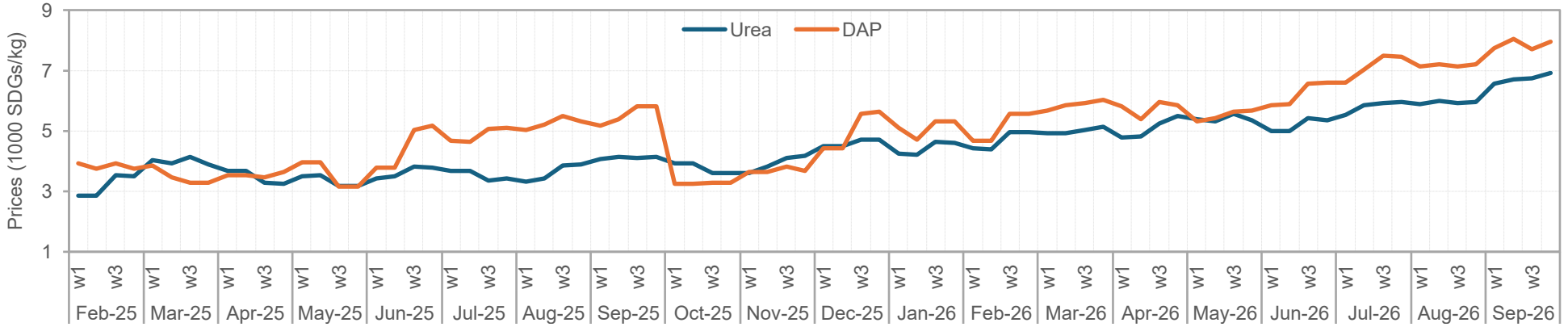
Seeds (Improved and Local)

The figure below shows weekly average retail seed prices (1,000 SDG/kg) from February 2025 to September 2026. Wheat and sorghum seed prices rose sharply in September compared with August. Improved sorghum seed prices also rose in September and remained above local sorghum seed prices.

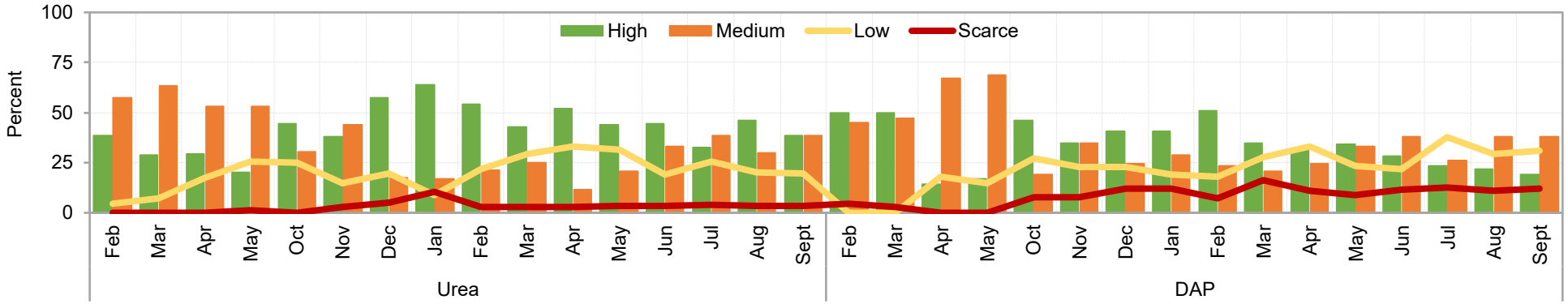


Fertilizers

Retail fertilizer prices (1,000 SDG/kg, weekly averages) increased in September 2026 after remaining relatively stable in August. DAP prices rose in September, despite a brief dip in mid-September while urea prices rose steadily.

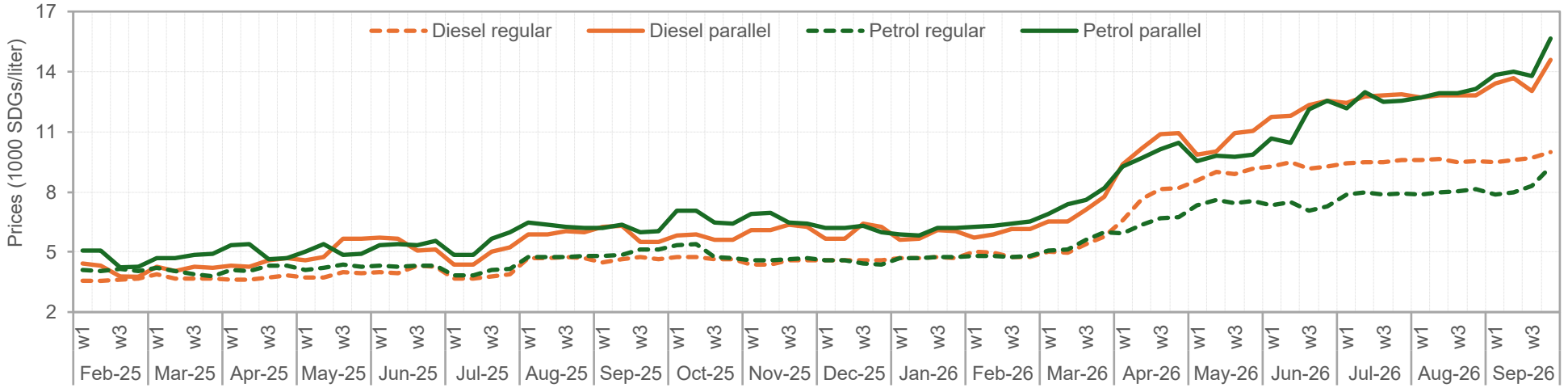


Perceived high availability scores from February 2025 to September 2026 show that, in September, the share of traders reporting high availability of urea declined compared with August, while the share reporting medium availability increased. For DAP, the share reporting high availability declined slightly and remained low compared with urea.

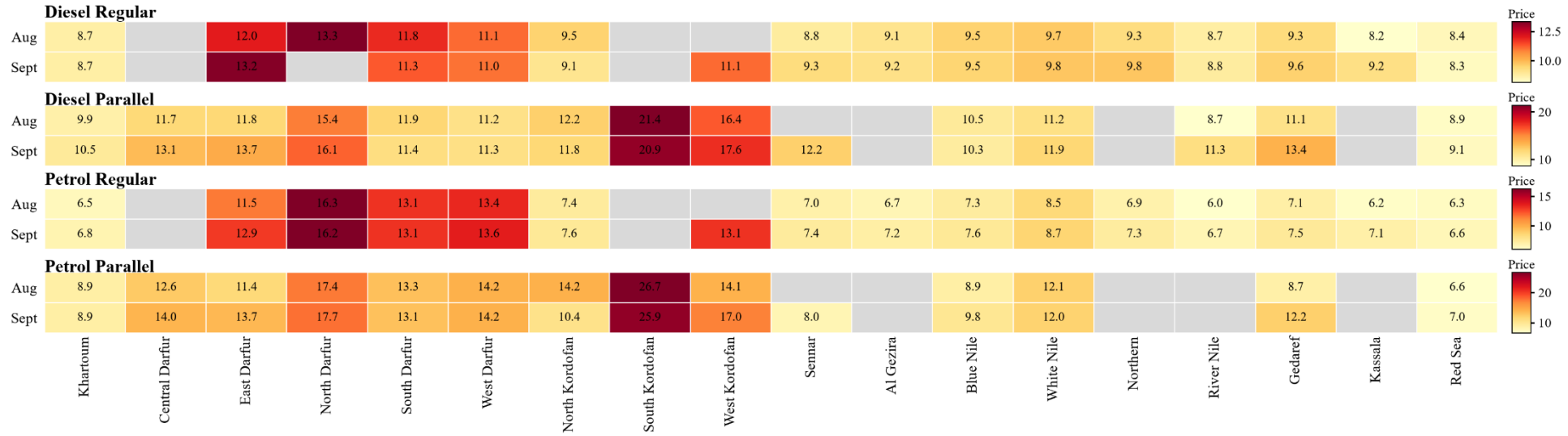


Diesel and Petrol

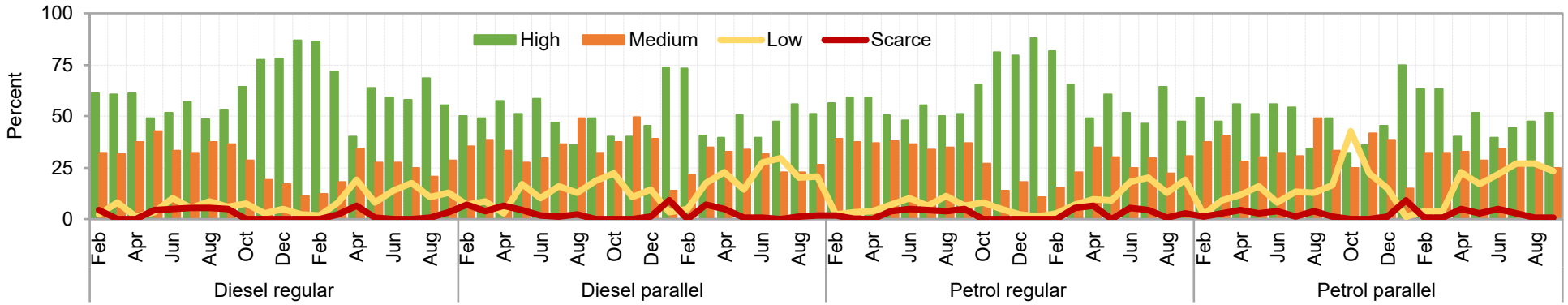
Retail fuel prices (SDG/liter, weekly averages, February 2025– September 2026) in parallel markets rose sharply in September 2026, especially in the last week of the month. Regular market prices, while remaining relatively stable since June, also increased in September especially for petrol in the final week.



The heatmap of retail fuel prices across states (1,000 SDG/liter) from February 2025 to September 2026 shows that prices rema ined substantially higher in the Darfur and Kordofan states than in other states. Parallel market prices were highest in South Kord ofan, followed by West Kordofan and North Darfur.

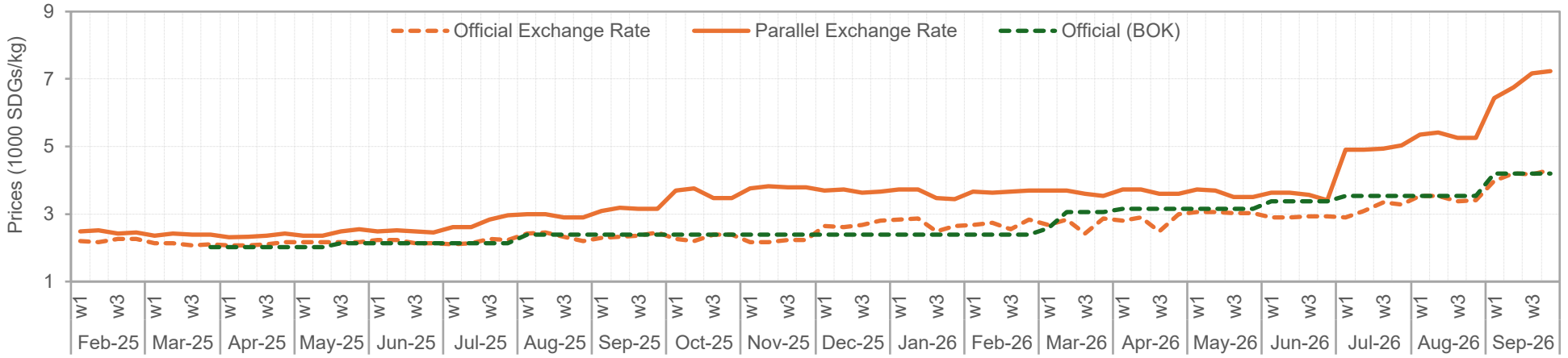


Perceived high-availability scores (February 2025–September 2026) for fuel show a slight decline for diesel in both regular and parallel markets in September compared with August. Perceived petrol high availability decreased in the regular market and increased in the parallel market in September.



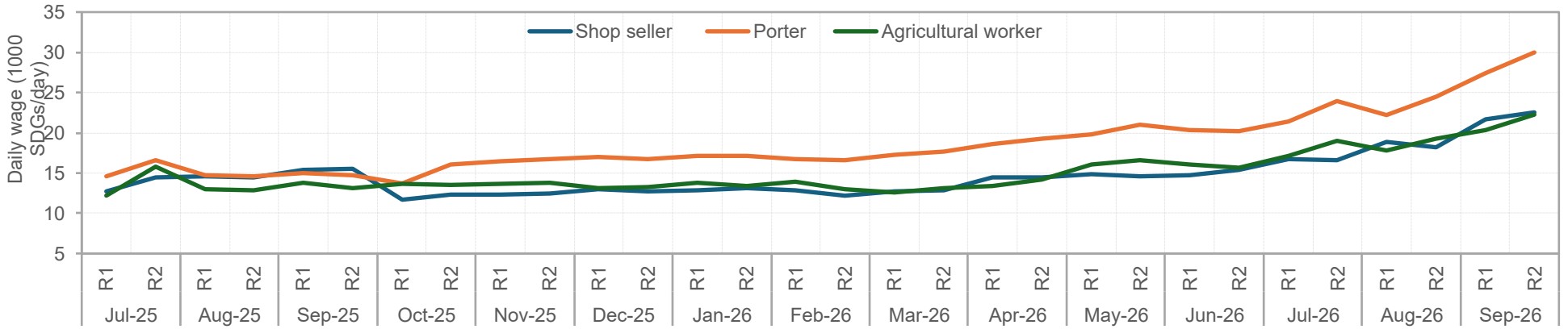
Exchange Rates

The parallel-market exchange rate (SDG per US dollar) rose sharply throughout September 2026. The official rate reported by traders and the Bank of Khartoum rate also rose slightly. As a result, the gap between the official and parallel rates widened considerably.

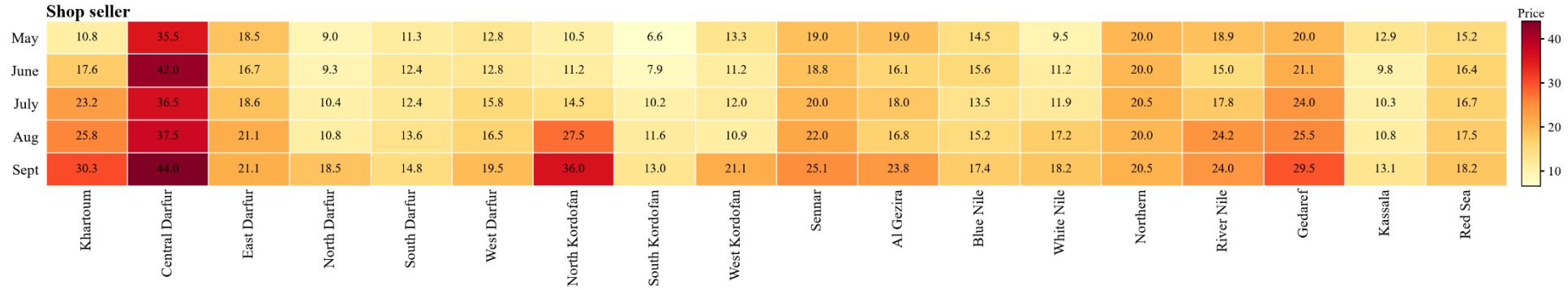


Labor wages

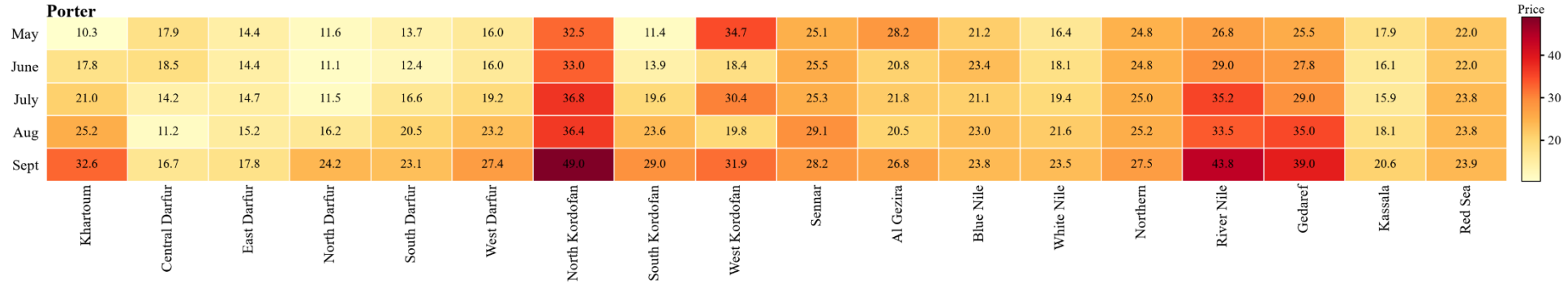
The figure shows average daily wages (1,000 SDG/day) for shop sellers, porters, and agricultural workers from July 2025 – September 2026. Overall, wages increased in September 2026 compared to August and increased sharper for porters compared to shop sellers and agricultural workers.



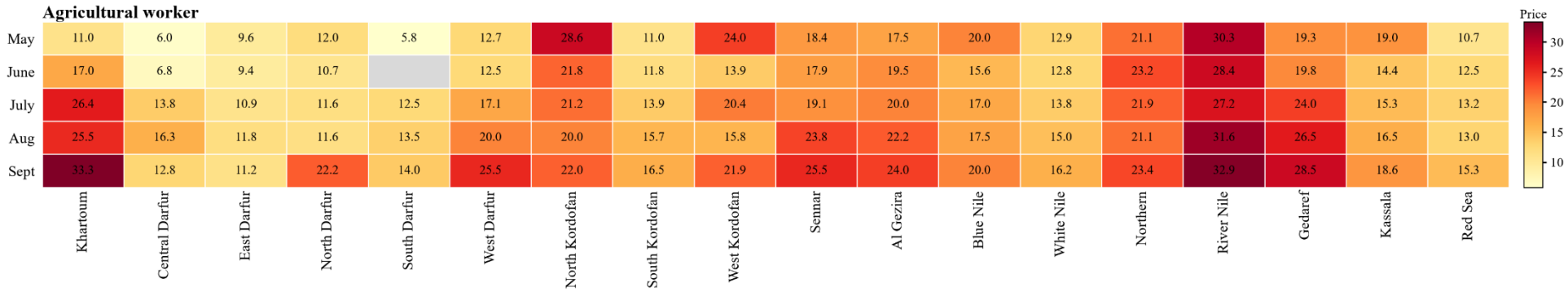
The heatmap of shop sellers' daily wages across states (1,000 SDG/day) from May to September 2026 shows that wages increased slightly in September compared with August in most states. During August and September, wages were consistently highest in Central Darfur, followed by North Kordofan, Khartoum, and Gedaref. In contrast, the lowest wages were recorded in South Kordofan, Kassala, and South Darfur.



For porters, wages increased notably in September compared with August across most states. In August and September, porter wages were highest in North Kordofan, River Nile, and Gedaref. In September, Khartoum and West Kordofan also recorded relatively high wages.



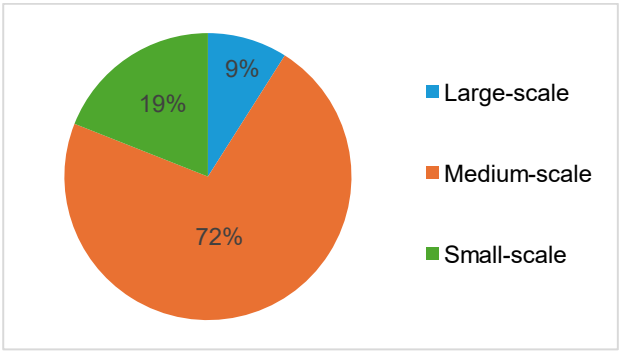
For agricultural workers, the highest September wages were recorded in Khartoum, River Nile, and Gedaref. In contrast, Darfur states, Red Sea, South Kordofan, and White Nile recorded comparatively lower wages during the same month. Throughout the five months, wages are higher in River Nile state.



Market Actors' Perceptions

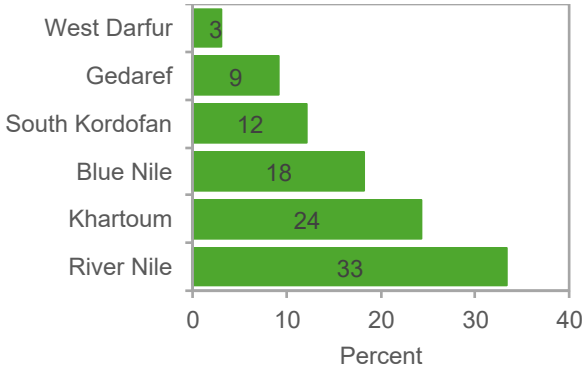
Size of merchants in the market

The distribution of merchants by trading scale (N=142) indicates that medium-scale traders account for 72 percent of all merchants and are primarily concentrated in South Kordofan, River Nile, and Northern states. Large-scale traders are predominantly located in Blue Nile state, while small-scale traders are more common in Khartoum, Gedaref, and Blue Nile states.



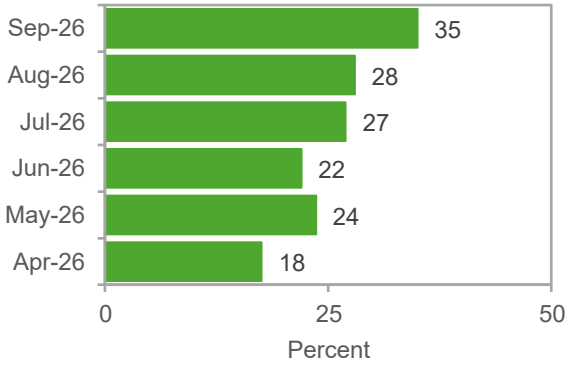
Supply Chain and Logistical Challenges Facing Merchants

In September 2026, 23 percent of merchants reported facing supply chain and logistical challenges, representing a significant decrease of four percentage points compared to August 2026. The highest proportion of reported challenges (N=33) was observed in River Nile (33 percent), followed by Khartoum (24 percent).



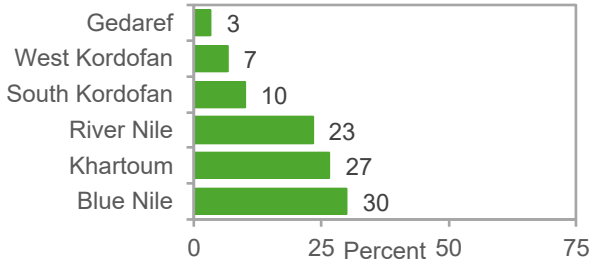
Changes in Demand Conditions

In September 2026, 35 percent of merchants reported changes in demand conditions (compared to 28 percent in August 2026). Merchants in Khartoum, Blue Nile, and South Kordofan states comprise the highest share of those reporting changes.



Financial and Liquidity Constraints

In September 2026, 21 percent of merchants reported facing financial and liquidity challenges compared to 15 percent in August (N=30). Merchants in Blue Nile state comprise the highest proportion of merchants reporting financial and liquidity constraints (30 percent), followed by Khartoum (27 percent), and River Nile (23 percent).

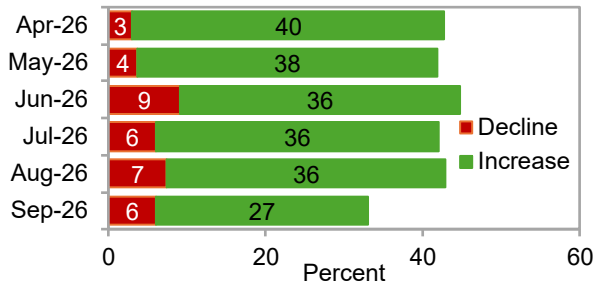


Storage and Power Access

The proportion of merchants reporting no storage constraints increased to 98 percent in September 2026, compared to 95 percent in August 2026.

Profits and Profitability Trends

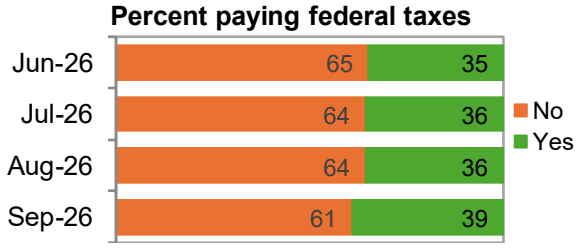
The share of merchants (April 2026 - September 2026) reporting increased profit margins declined to 27 percent in September, compared to 36 percent in June, July, and August 2026.



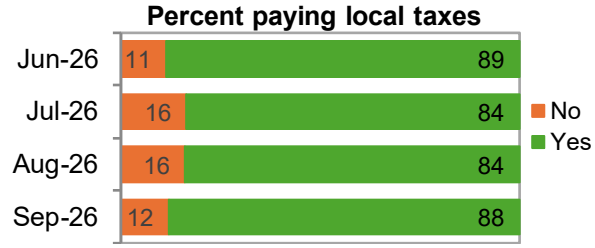
The highest shares of merchants reporting profit increases are in South Kordofan and White Nile states, while merchants in Khartoum, North Kordofan, and Blue Nile states report the highest shares of merchants reporting stable profit margins. Declines in profit margins were limited, however concentrated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

Taxes and Fees

The share of merchants reporting payments of federal taxes and government fees (June 2026 – September 2026) increased marginally to 39 percent in September, compared to 36 percent in July and August 2026. Most merchants reporting federal tax payments were in River Nile, Northern, and North Kordofan states.



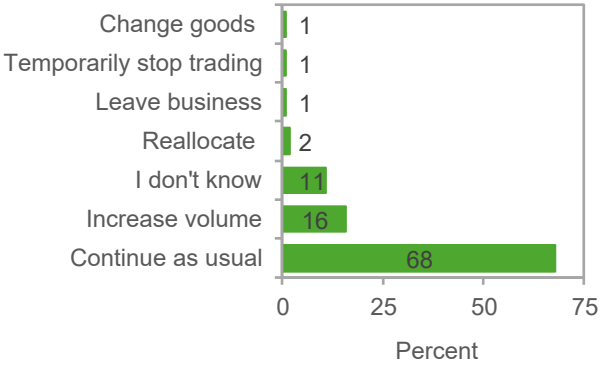
The share of merchants paying state and locality-level fees increased to 88 percent in September 2026, compared to 84 percent in July and August 2026, with most payments reported in Khartoum, Blue Nile, and River Nile states.



Traders' Future Outlook

Traders' outlook for the next 1–3 months indicate that 68 percent of surveyed merchants plan to continue trading as usual, while 16 percent plan to increase the volume of goods traded.

Merchants in South Kordofan and West Kordofan states accounted for the highest share of merchants intending to increase trade volumes.



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ACKNOWLEDGMENTS

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