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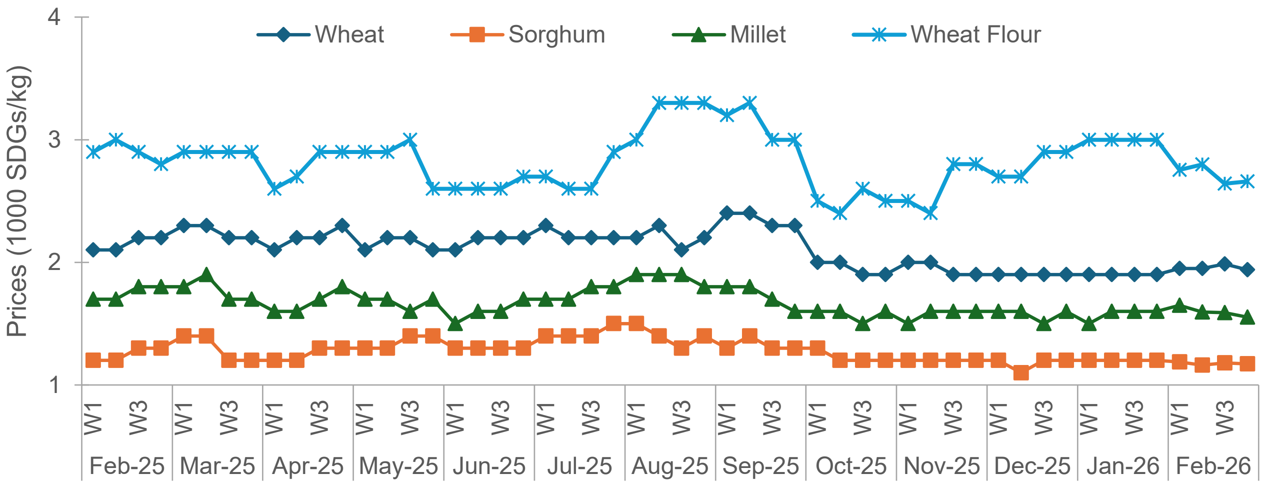
MARKET PRICES AND AVAILABILITY REPORT (13) MARCH 2026

Essential Commodities Prices, Availability, and Market Actors' Perceptions

February 2026*

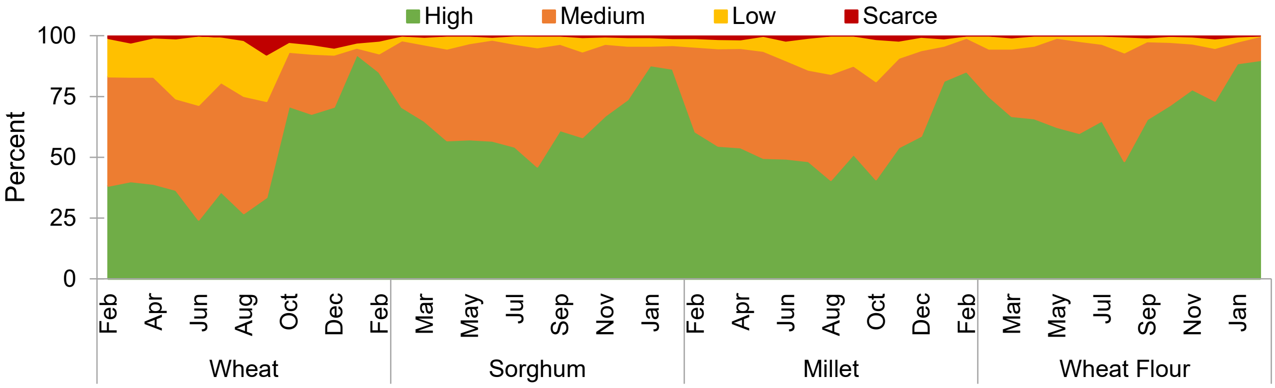
Cereals and Flour

The following figure presents weekly average local prices of vegetables (SDG/kg) from February 2025 to February 2026. Prices of cereals remained broadly stable during January and February 2026, reflecting relatively high market availability, as illustrated in the subsequent figure. However, wheat flour prices decreased slightly compared with January levels.

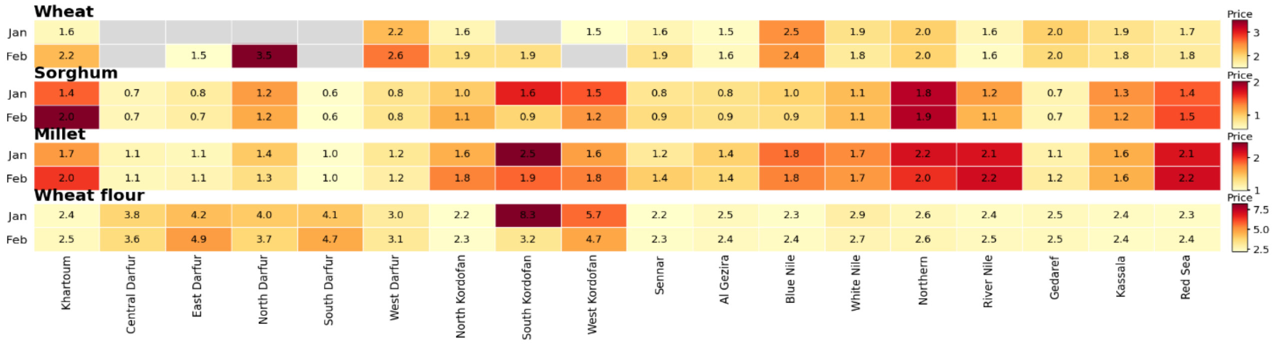


The following figure presents availability scores for cereals and wheat flour from February 2025 to February 2026. The results show that perceived availability of wheat and sorghum decreased slightly in February 2026 compared to January, while those of millet and wheat flour improved slightly.

* Citation: Rakhy, Tarig; Mohamed, Shima; Nigus, Abushama, Hala; Halefom Yigzaw; Suliman, Gotada; and Siddig, Khalid. 2026. Essential commodities prices, availability, and market actors' perceptions: February 2026. Sudan Market Prices and Availability Report 13. Washington, DC: International Food Policy Research Institute.

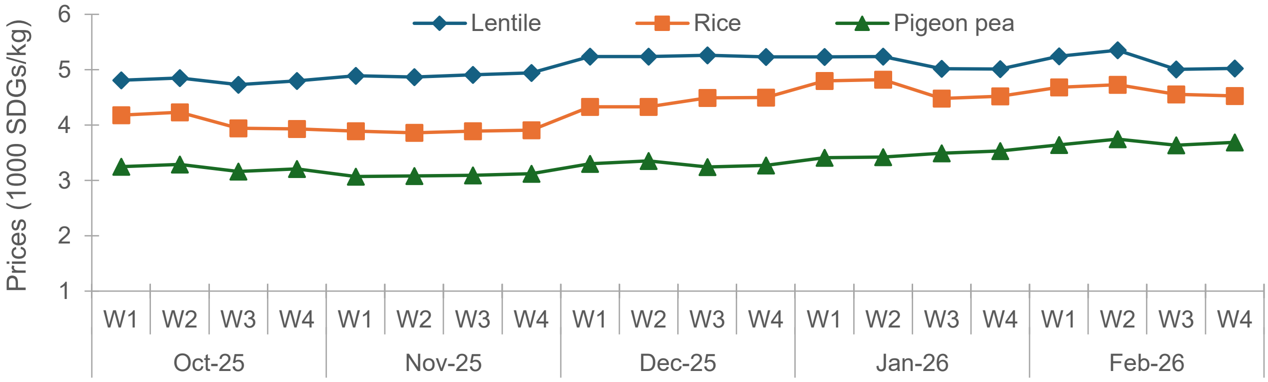


In February 2026, wheat prices were highest in North and West Darfur, and Blue Nile. Sorghum prices were highest in Khartoum and Northern State and lowest in most Darfur and Kordofan states, as well as Gedaref. Millet recorded the highest prices in River Nile, Red Sea, Northern, and Khartoum. Wheat flour remained relatively stable across states (heatmap).

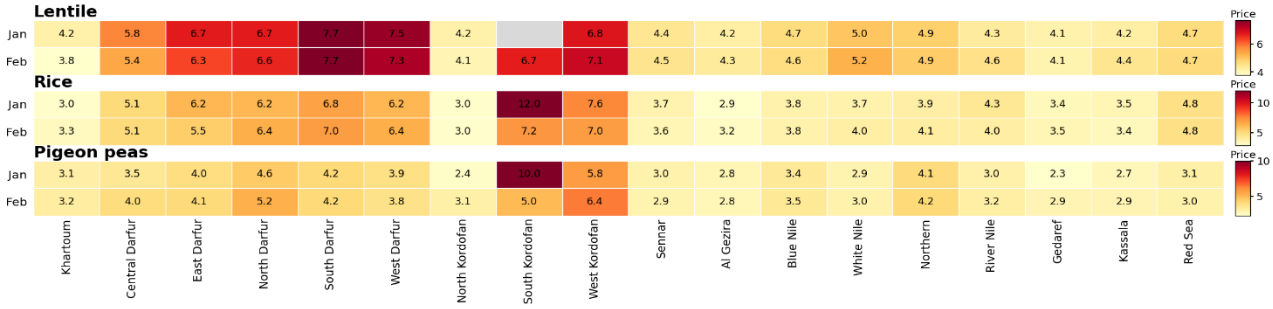


Lentils, Rice, and Pigeon Peas

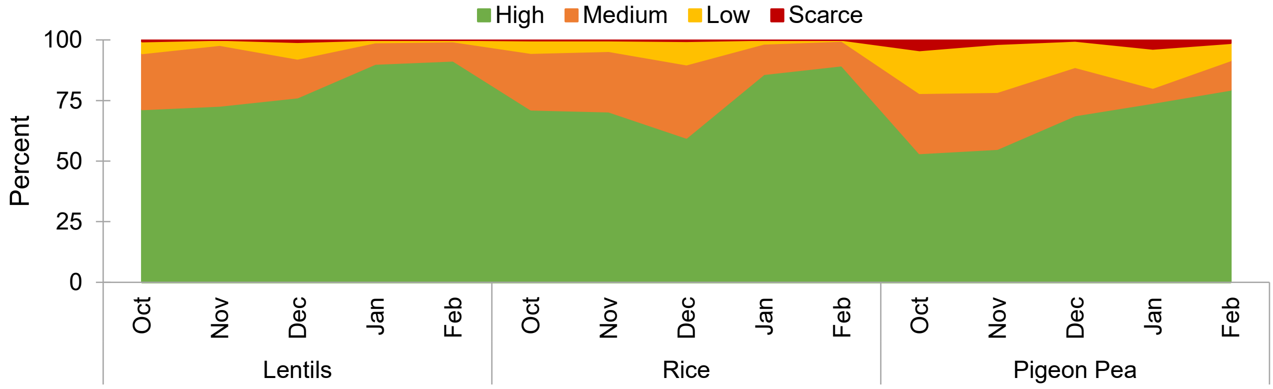
The following figure which presents local prices of lentils, rice, and pigeon peas (weekly averages, 1,000 SDG/kg, October 2025–February 2026), shows that lentil and rice prices declined at the end of February 2026, while pigeon pea prices increased slightly.



The heatmap below shows that in February 2026, Darfur, West Kordofan, and South Kordofan recorded the highest prices for lentils, rice, and pigeon peas across states.

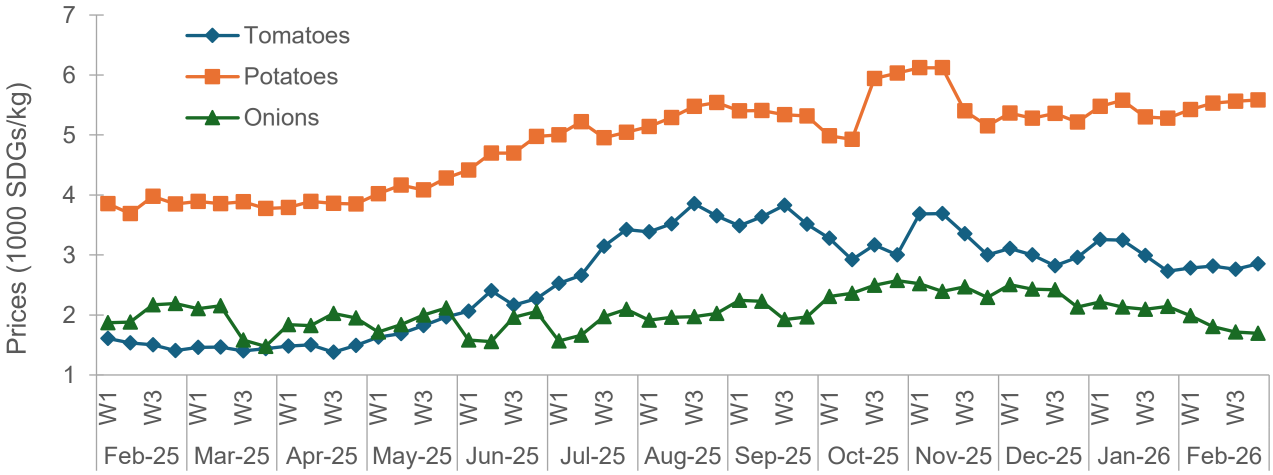


The following figure, which presents availability scores for lentils, rice, and pigeon peas (October 2025–February 2026), shows that in February 2026 the share of respondents reporting "high" availability increased for all three commodities.

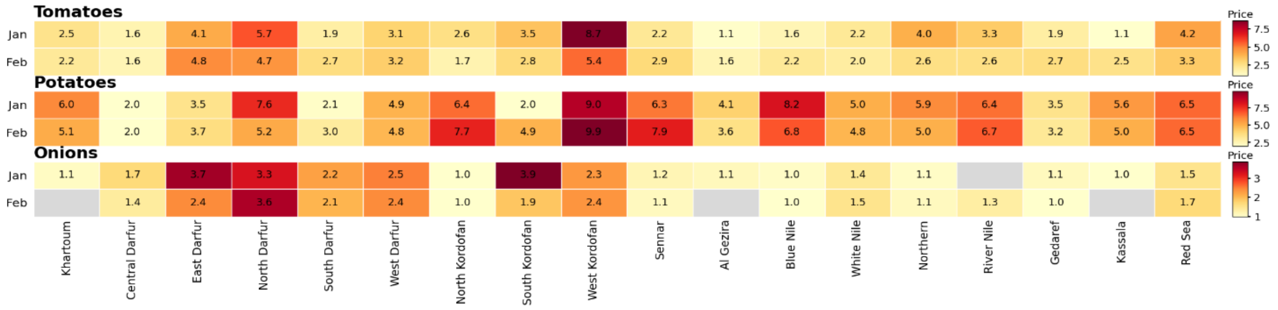


Vegetables

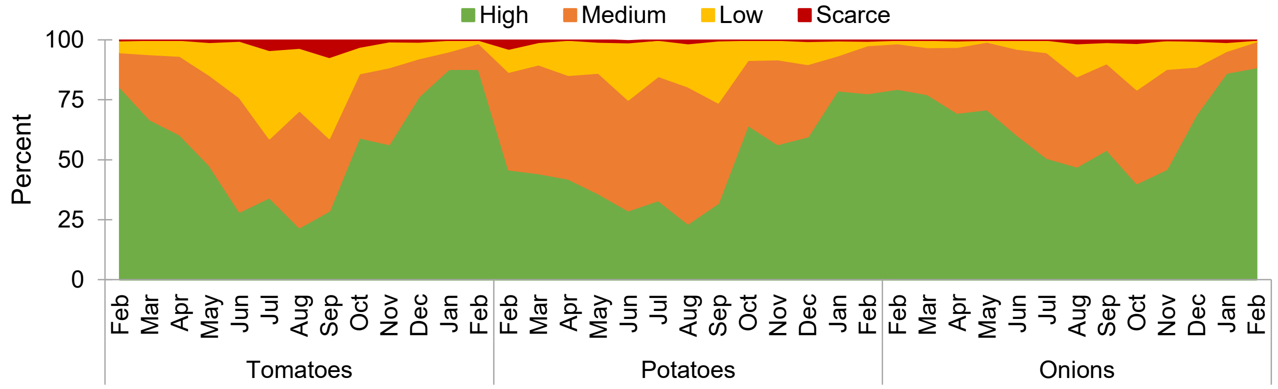
The following figure, depicting local vegetable prices (weekly averages, SDG/kg, February 2025–February 2026), shows that in February 2026 potato prices increased slightly compared with January, onion prices declined slightly and tomato prices remained stable throughout February.



The following heatmap, depicting retail monthly average prices of vegetables across states (1,000 SDG/kg, January - February 2026), shows that the highest tomato prices in February were recorded in West Kordofan, East and North Darfur states. Potato prices were highest in West and North Kordofan states, Sennar, Blue Nile, River Nile and Red Sea. Onion prices were highest in most Darfur and West Kordofan, while remaining relatively low and stable across most other states.

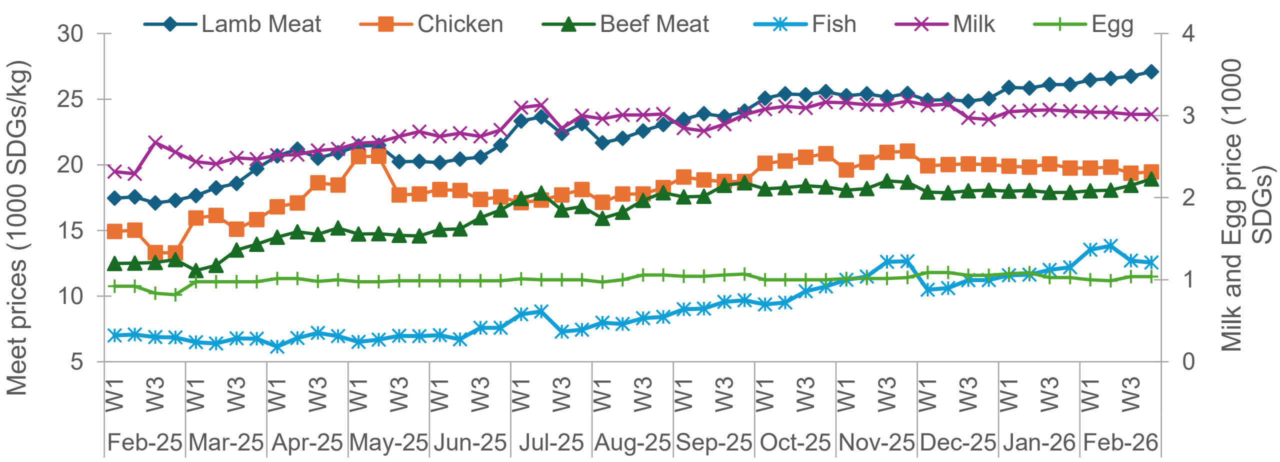


The figure below on vegetable availability scores (February 2025–February 2026), indicates that the share of traders reporting high availability of tomatoes remained stable at 88 percent between January and February 2026. Onion availability increased marginally, while potato availability declined slightly in February compared to January.

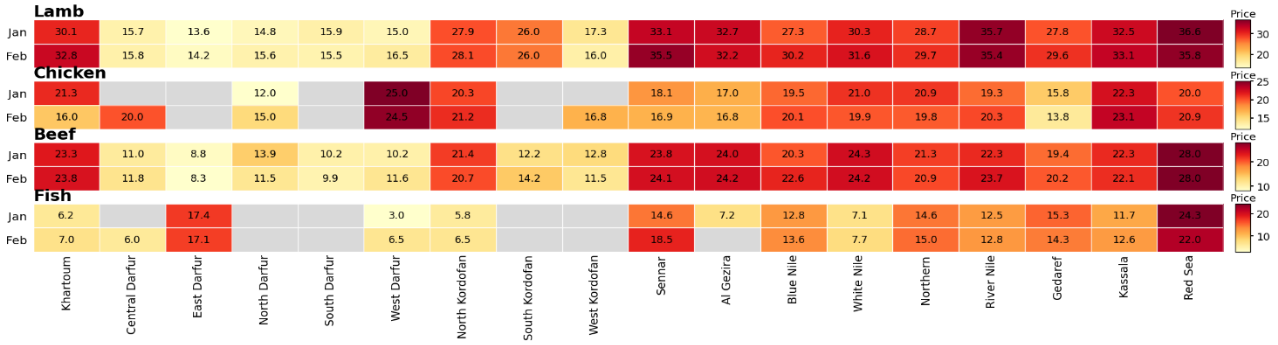


Meat and Animal Products

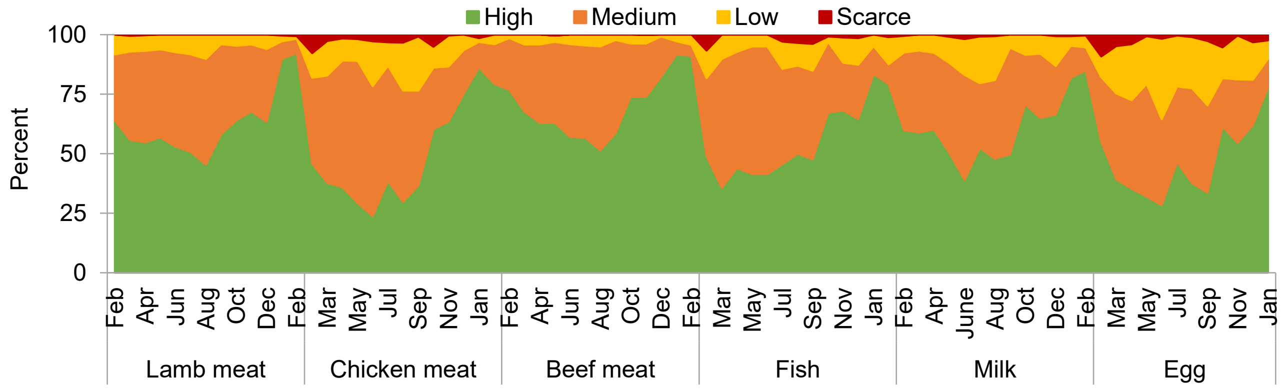
The following figure, showing retail prices of meat and animal products (weekly averages, SDG/kg, February 2025–February 2026), indicates that in February 2026 lamb and beef prices increased, while prices for chicken, milk, and eggs remained stable.



The following heatmap, showing local prices of meat and animal products across states (1,000 SDG/kg) for January–February 2026, indicates that Red Sea continued to record the highest prices for lamb, beef, and fish, while West Darfur registered the highest chicken price.

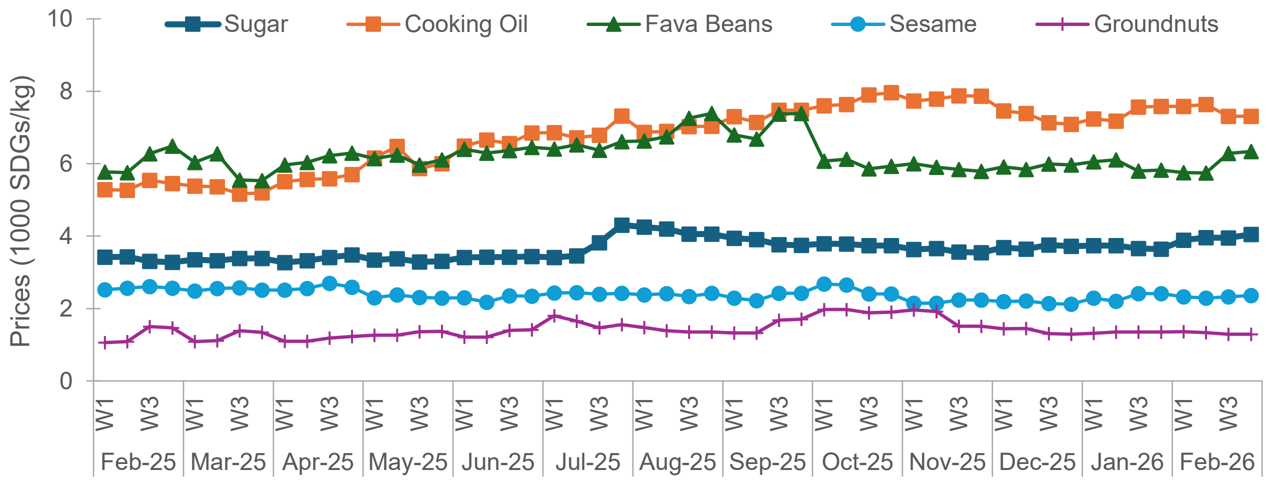


The following figure, which depicts availability scores for meat and animal products (February 2025–February 2026), shows that in February 2026 the share of respondents reporting "high" availability increased for lamb and milk, but declined for chicken and fish.

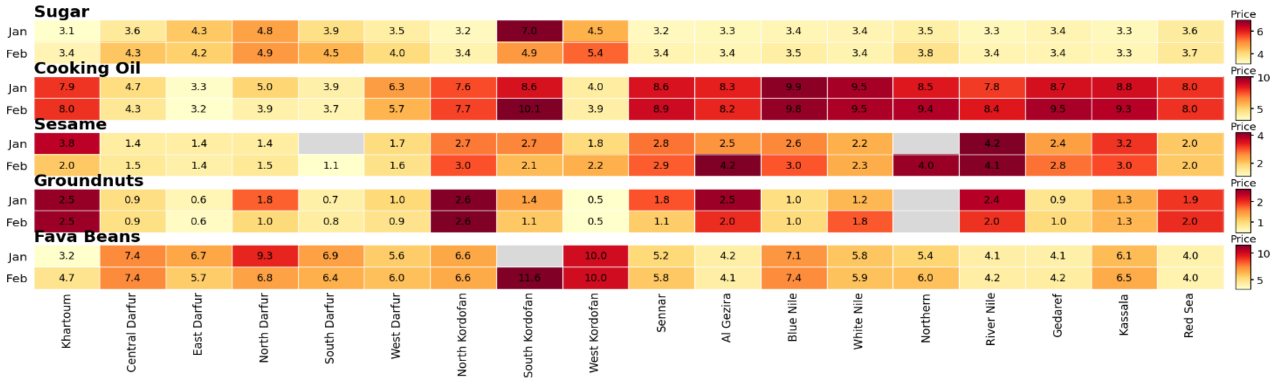


Oilseeds, Cooking Oil, Sugar, and Fava Beans

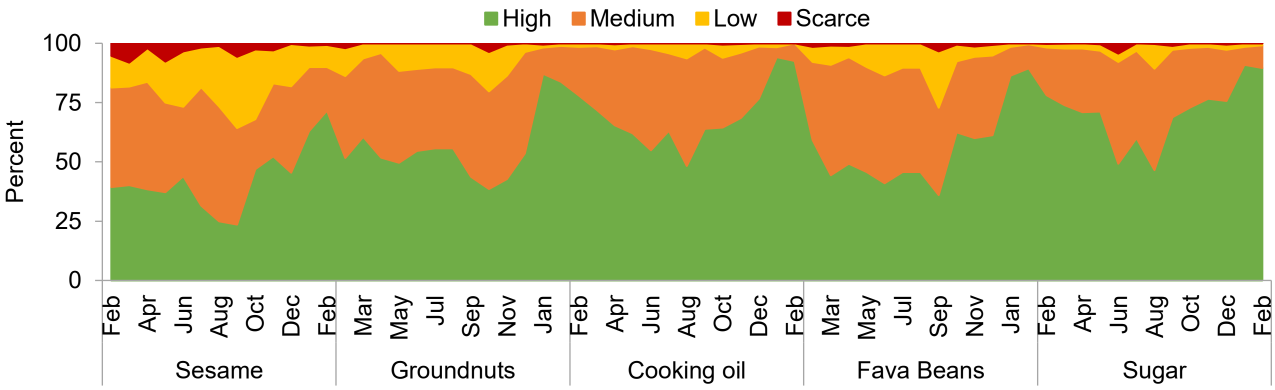
The following figure, depicting local prices of oilseeds (kg), cooking oil (liter), sugar (kg), and fava beans (kg) (1,000 SDG) from February 2025 to February 2026, shows that in February 2026 groundnut and sesame prices stabilized, fava bean and sugar prices increased, and cooking oil prices declined.



The following heatmap, showing prices of oilseeds, cooking oil, sugar, and fava beans across states (1,000 SDG) for January–February 2026, indicates that in February 2026 prices for sugar, sesame, cooking oil, and fava beans increased in most states, while prices for groundnuts decreased or remained stable in many states.

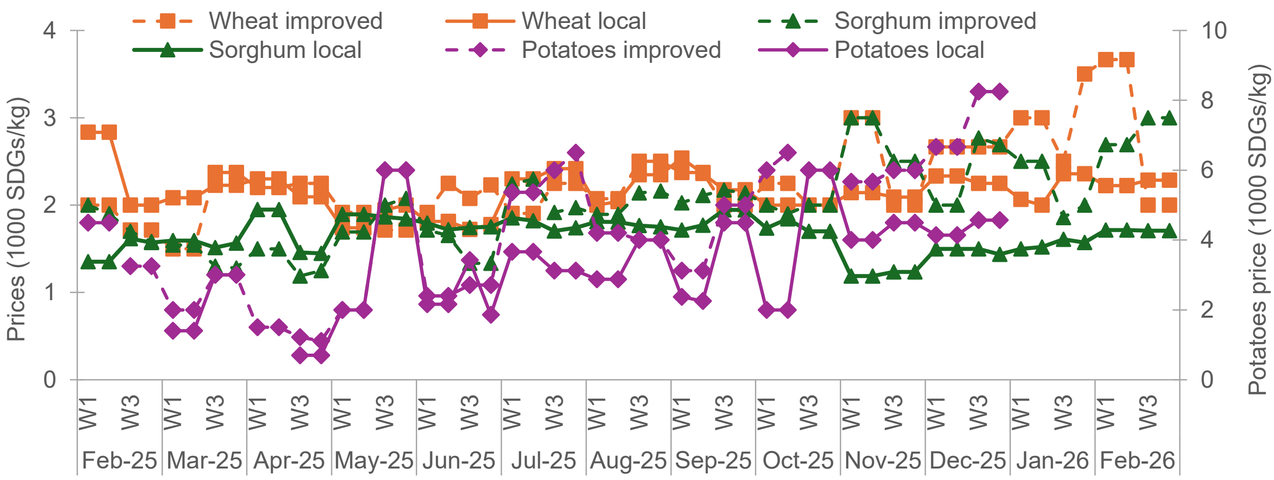


The following figure, depicting availability scores for oilseeds, cooking oil, sugar, and fava beans (February 2025–February 2026), shows that in February 2026 the share of traders reporting “high” availability increased for sesame and fava beans, but decreased for groundnuts compared to January 2026.



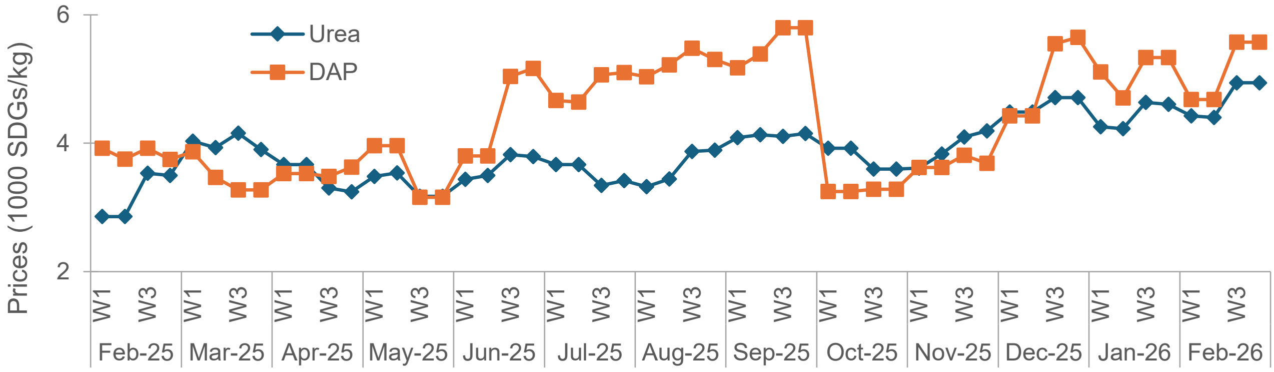
Seeds (Improved and Local)

The following figure depicts retails seed prices (1,000 SDG/kg, monthly averages, February 2025–February 2026). It shows that the price of improved wheat seed dropped significantly. In contrast, the price of improved sorghum seed increased in February compared with January.

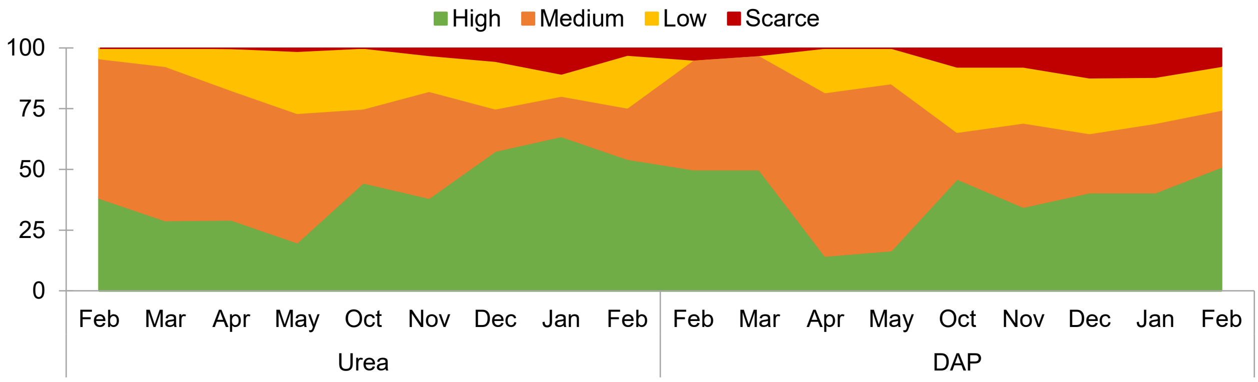


Fertilizers

The following figure, depicting fertilizer prices (1,000 SDG/kg, monthly averages, February 2025–February 2026), shows that prices increased in early February and stabilized in the third week of the month. Throughout December and February, DAP prices remained consistently higher than those of urea.

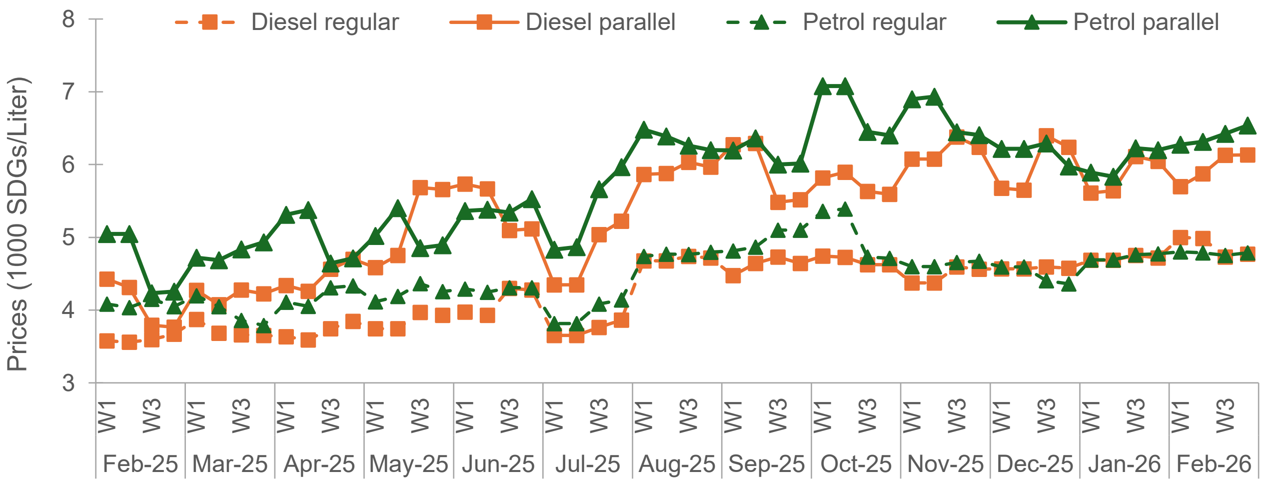


The following figure, depicting fertilizer availability scores (February 2025– February 2026), shows that the share of traders reporting high availability of urea decreased, while those reporting high availability of DAP increased in February compared to January 2026.

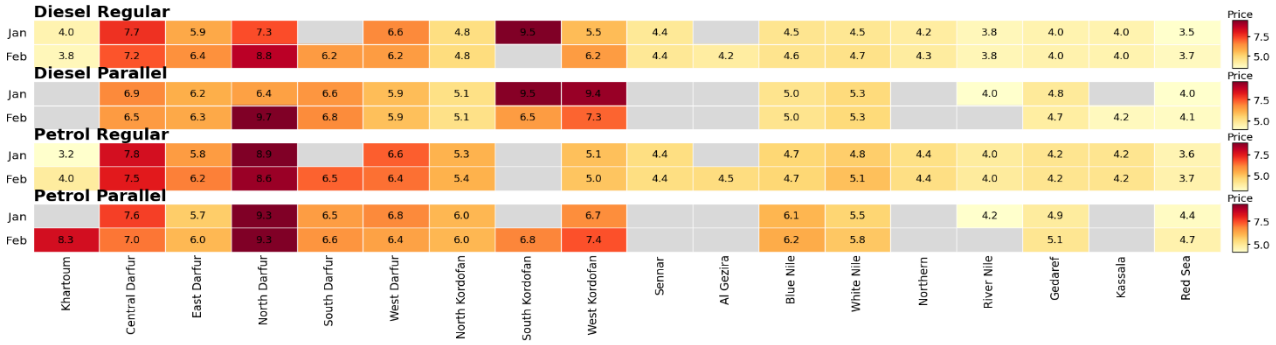


Diesel and Petrol

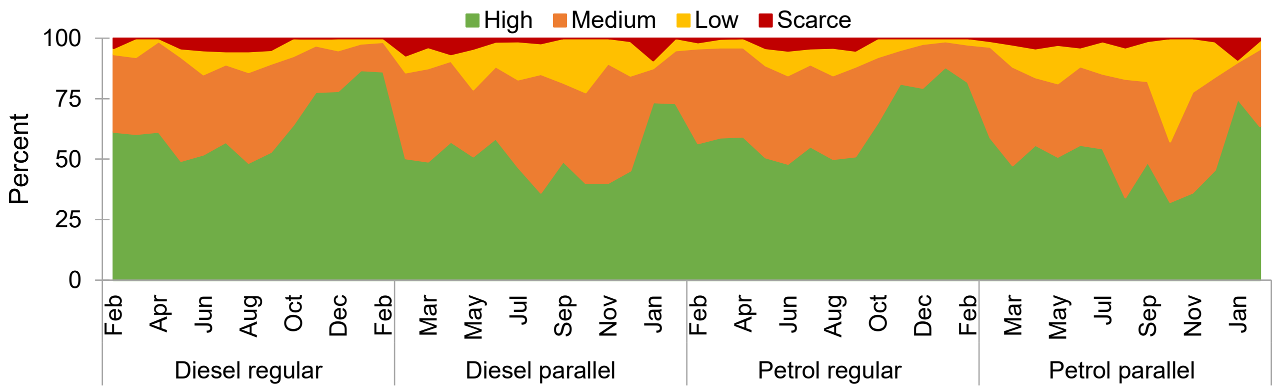
The following figure, depicting retail fuel prices (SDG/liter, monthly averages, February 2025– February 2026), shows that parallel market prices slightly increased in February compared to January. In contrast, regular market prices for both diesel and petrol remained relatively stable, except for a slight fluctuation in the regular diesel price in the first two weeks of February 2026.



The following heatmap, depicting fuel prices across states (1,000 SDG/liter), February 2025– February 2026), shows the spatial and temporal dynamics of fuel prices across states during this period. Prices remained substantially higher in the Darfur states, particularly North and Central Darfur, compared with other regions.

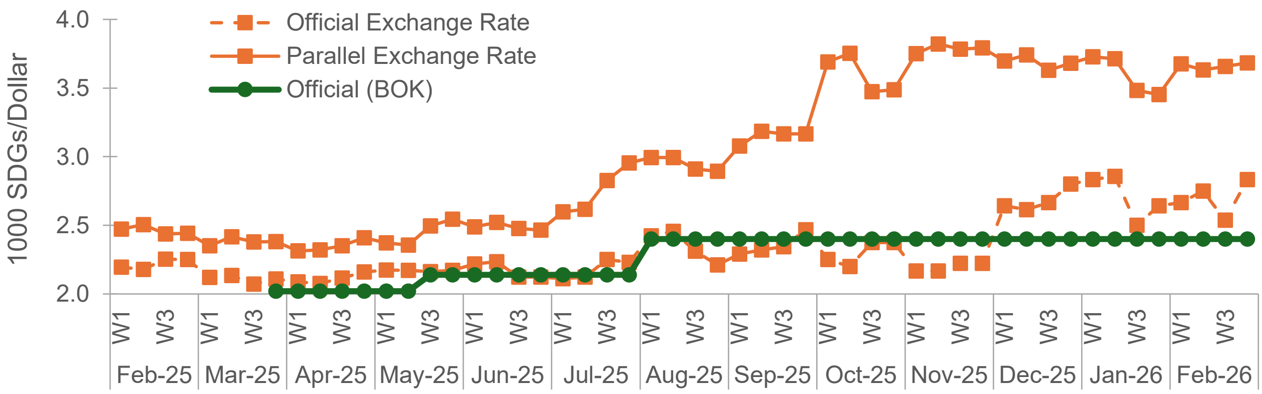


The following figure, depicting fuel availability scores (February 2025–February 2026), shows that the share of respondents reporting high diesel availability in the regular and parallel markets remained relatively stable. The share of respondents reporting high petrol availability decreased in February 2026.



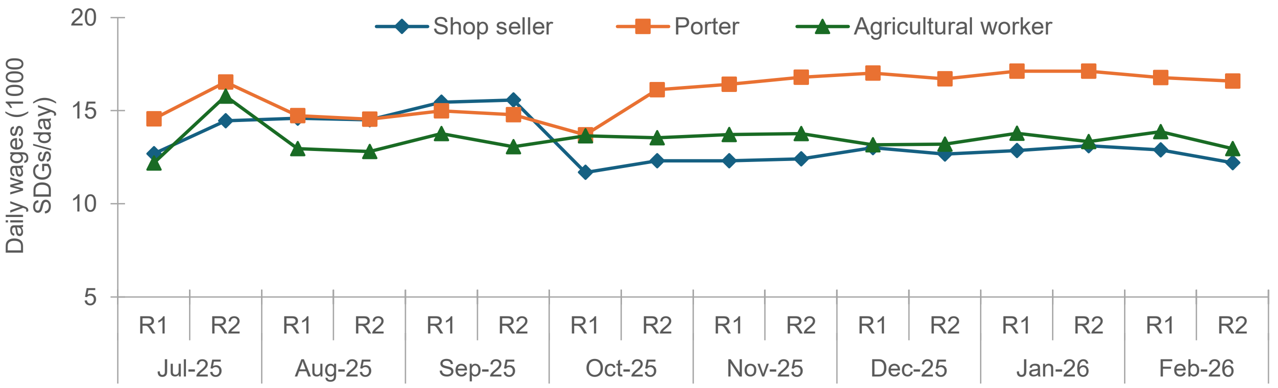
Exchange Rates

The following figure, depicting the exchange rate (SDG per US dollar), February 2025– February 2026, shows that in February the parallel exchange rate initially slightly increased and remained stable afterwards. The official exchange rate initially decreased before rising slightly in the final week of February, leaving a persistent wide gap between the parallel and official rates.

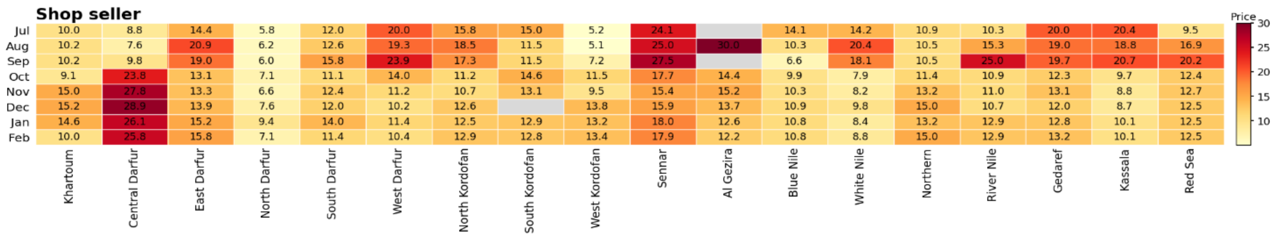


Labor wages

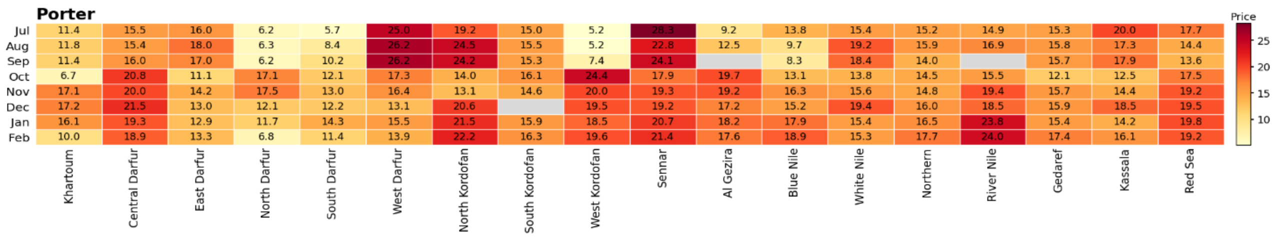
The following figure, depicting labor daily wages (biweekly averages, SDG/day, July 2025–February 2026), shows that porter wages remained the highest and relatively stable in February. Wages for agricultural workers and shop sellers slightly declined.



The following figure, depicting shop seller daily wages across states (1,000 SDG/day), July 2025–February 2026, shows relatively higher levels in Central Darfur state.



The following figure, depicting porter daily wages across states (1,000 SDG/day), July 2025– February 2026, shows River Nile state recorded higher porter wages in January and February 2026.

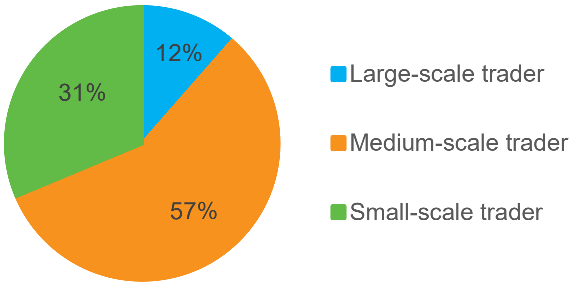


The following figure, depicting agricultural worker daily wages across states (1,000 SDG/day), July 2025–February 2026, shows that River Nile State recorded higher agricultural wages in January and February 2026 as well as Blue Nile and South Kordofan states in February.

Market Actors' Perceptions

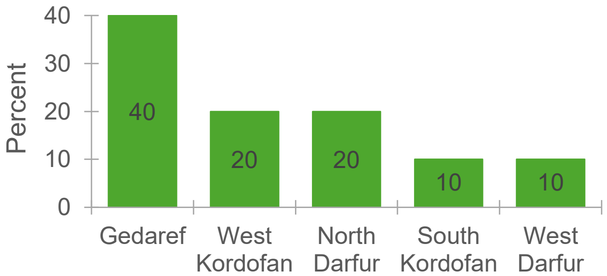
Size of merchants in the market

The figure below shows the distribution of merchants by trading scale (N=130) where Medium-scale traders constitute the majority (57 percent). Large-scale traders are mainly concentrated in Northern Blue Nile, and Red Sea states, whereas medium-scale traders are primarily in South Kordofan, North Kordofan and Khartoum states. Small-scale traders are more prevalent in Blue Nile and Gedaref.



Supply Chain and Logistical Challenges Facing Merchants

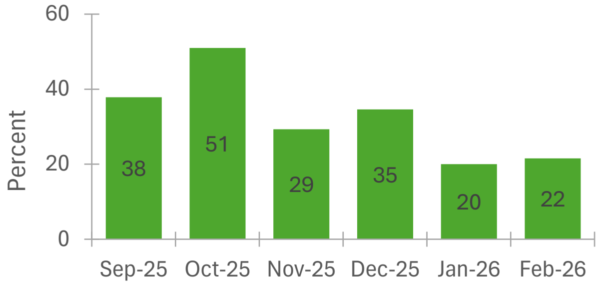
In February 2026, 8 percent of merchants reported supply chain and logistical challenges. The figure (N=10)[2] shows the highest shares in Gedaref (40 percent), followed by West Kordofan and North Darfur (20 percent each).



Changes in Demand Conditions

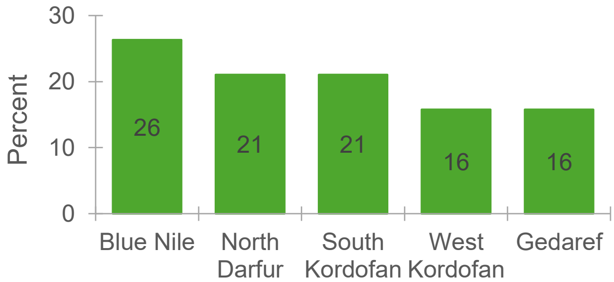
The figure below illustrates changes in demand conditions (N=28) from September 2025 to February 2026, as well as variations across states in February. Changes in demand conditions peaked in October 2025 (51 percent) before declining to 20 percent and 22 percent in January and February 2026, respectively, reflecting increased stability in demand over time.

Across states, the largest changes in demand were reported in Blue Nile and West Darfur, while Northern State recorded the highest share of merchants reporting no change, suggesting relatively stable demand conditions in February 2026.



Financial and Liquidity Constraints

The figure illustrates the financial and liquidity challenges faced by merchants in February 2026 (N=19). Only 15 percent of merchants reported financial constraints, marking a sharp decline compared to previous months. The highest shares of constrained merchants are observed in Blue Nile, followed by North Darfur and South Kordofan. In contrast, Northern state records the largest proportion of merchants reporting minimal or no financial constraints.



Storage and Power Access

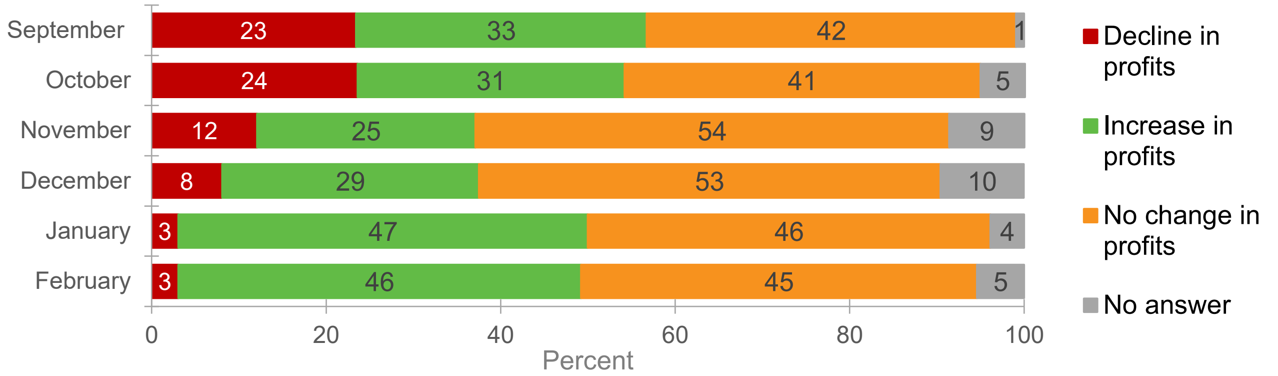
The share of merchants reporting no storage constraints declined slightly from 97 percent in January to 95 percent in February. Storage and power access constraints remained limited and

[2] Only 10 out of the 130 surveyed merchants reported facing logistical challenges. As such, the percentage distribution across the five states is indicative and should be interpreted with caution due to the limited number of observations.

were reported only in a few locations, mainly Gedaref, North Darfur, and South Kordofan.

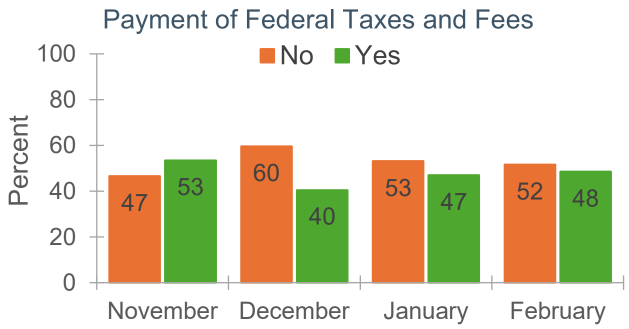
Profits and Profitability Trends

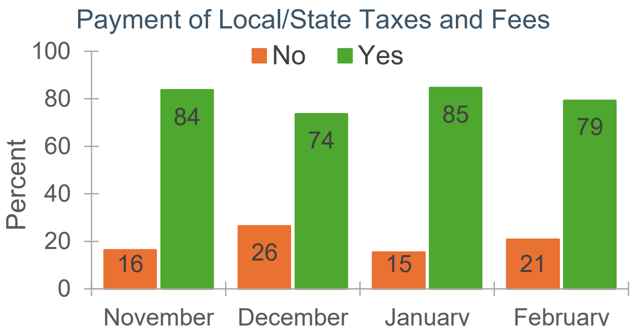
The figure shows that the share of merchants reporting increased profit margins remained relatively stable between January and February 2026. The highest shares of profit increases are observed in South Kordofan, White Nile, West Kordofan, and West Darfur, while Northern state records the largest share of stable margins. Declines in profit margins were limited and concentrated in Blue Nile, Gedaref, and North Darfur.



Taxes and Fees

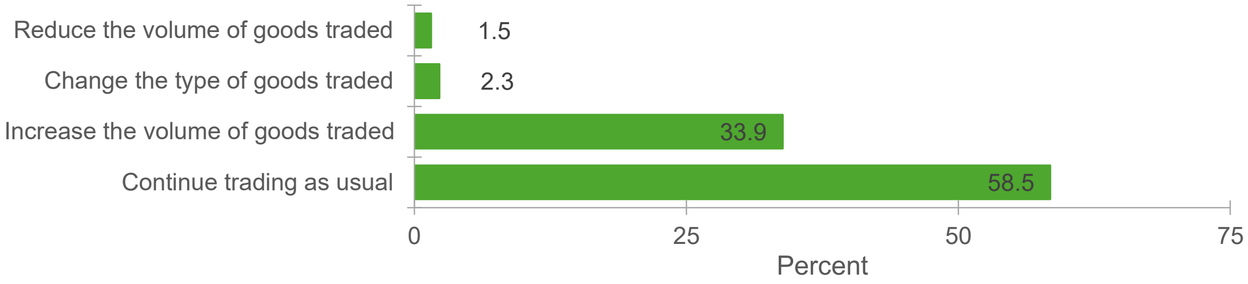
The figures show that the share of merchants paying federal taxes increased slightly from 47 percent in January to 48 percent in February 2026, with most payments reported in Northern, North Kordofan, and Khartoum. In contrast, the share paying state and locality-level fees declined from 85 percent to 79 percent, concentrated mainly in Northern, Blue Nile, and Gedaref.





Traders' Future Outlook

The figure shows that 58.5 percent of merchants plan to continue trading as usual over the next 1–3 months (from February 2026), down from 68.5 percent in January. South Kordofan records the highest share of merchants intending to increase trade volumes, while North Darfur is the only state where merchants report plans to reduce trade amid uncertainty.



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ACKNOWLEDGMENTS

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