



Essential Commodities Prices, Availability, and Market Actors’ Perceptions

July 2025

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Summary

This report analyzes market dynamics in Sudan between February and July 2025, focusing on prices, availability, quality, fuel, exchange rates, and traders’ perceptions of supply, demand, profits, and market conditions.

Between February and July 2025, Sudan’s markets showed mixed trends and sharp regional disparities. Cereal prices were mostly stable: wheat held steady with a short rise in early July, sorghum increased in June then stabilized, millet fluctuated slightly, and wheat flour fell in early July before rising sharply. Wheat and wheat flour availability improved, while sorghum and millet availability declined marginally.

Vegetable prices rose sharply. Tomato prices surged in July as availability fell from 80 percent in February to 34 percent. Potato prices rose steadily, while onion prices increased moderately with highest levels in North Darfur and Northern State. Quality perceptions fell for tomatoes and potatoes but remained high for onions.

Animal products showed overall increases: lamb and beef rose steadily, chicken fluctuated week to week, fish declined slightly, milk stabilized after a small rise, and eggs rose gradually. Regional disparities were notable, with lamb and beef prices highest in Red Sea and White Nile.

For oilseeds and staples, sugar peaked in July, cooking oil rose steadily, sesame stayed stable, groundnuts were steady except for a May dip, and fava beans remained the most expensive. Regional variation was wide, especially for sugar, cooking oil, and groundnuts.

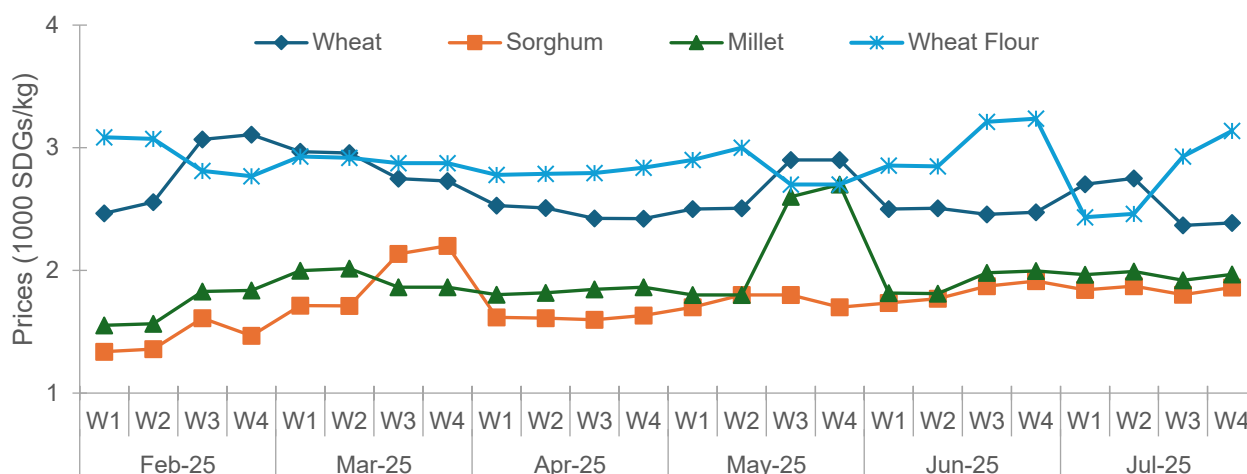
Fuel prices dropped sharply from late June to early July then rebounded, with parallel markets consistently higher—over 10,000 SDG/liter for diesel in East Darfur. Exchange rates rose steadily, with parallel rates exceeding 2,500 SDG/USD in all states by July.

Traders faced ongoing challenges: 43 percent reported supply chain disruptions, liquidity shortages were acute in West Darfur, Gedaref, and Central Darfur, and storage and safety issues persisted in Central Darfur, Khartoum, and Red Sea. Profits were stable for nearly half, but losses were concentrated in North Darfur while Khartoum, Sennar, and Northern saw gains. Around 80 percent paid local/state taxes and 39 percent federal taxes. Looking ahead, 53 percent plan no change in trade volumes, 20 percent expect to expand, and 10 percent anticipate reductions, mainly in East Darfur and River Nile.

Cereals and Flour

Wheat prices were stable in June and July, with a brief increase in early July before returning to previous levels (Figure 1). Sorghum prices rose in June and stabilized in July. Millet prices showed only slight fluctuations, remaining broadly stable. Wheat flour prices declined in early July after a steady rise in June, then increased sharply in mid- to late July.

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



Regional variations persisted in July (Figure 2). Wheat prices rose slightly in North Darfur, Blue Nile, and Gedaref but declined in Red Sea and River Nile. Sorghum prices were stable overall, with modest increases in East Darfur and White Nile. Millet prices were highest in Khartoum, East Darfur, Blue Nile, and River Nile, and lowest in Red Sea, Northern, and Central Darfur. Wheat flour prices increased in July, especially in Darfur states, with East Darfur recording the highest levels.

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

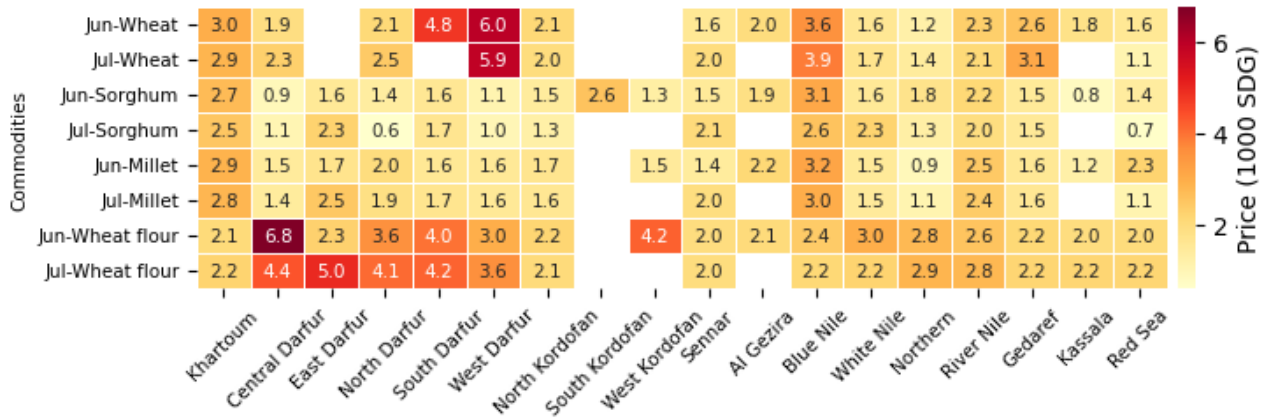


Figure 3 shows that traders reporting high availability of wheat rose from 24 percent in June to 36 percent in July. Wheat flour availability also increased, from 60 to 65 percent. Sorghum and millet availability declined slightly, with high availability dropping from 57 to 54 percent and from 50 to 48 percent, respectively.

Figure 3: Cereals and wheat flour availability scores, February - July 2025

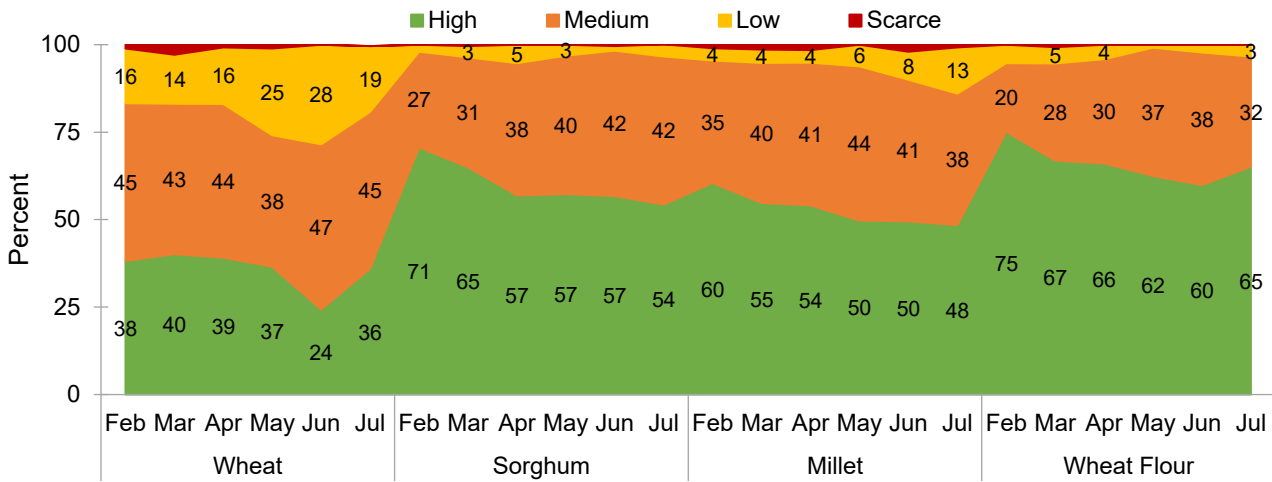
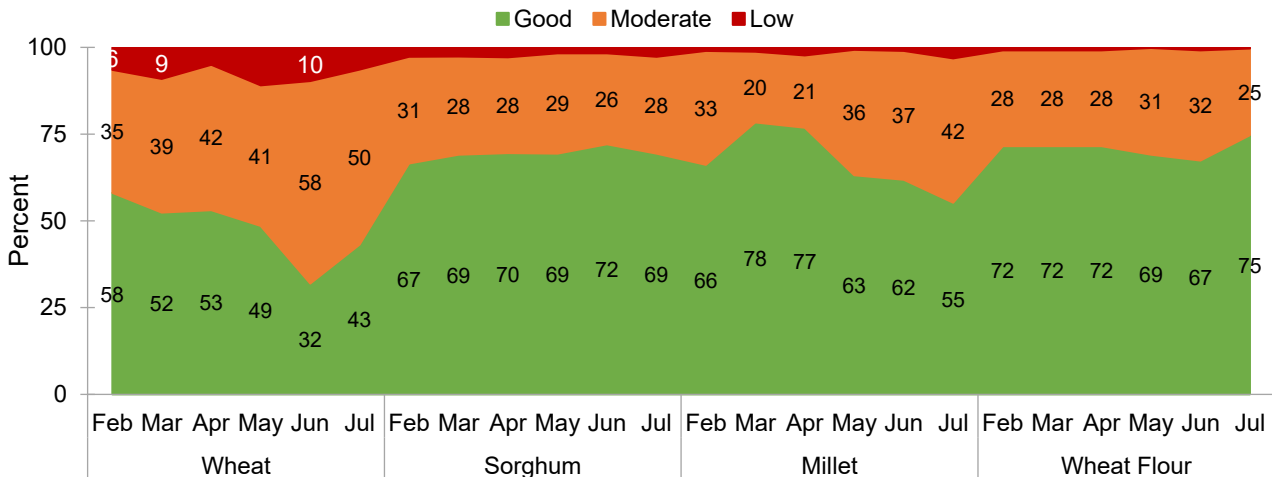


Figure 4 shows that wheat quality improved in July, with the share of traders rating it as good rising from 32 to 43 percent. Good-quality reports for sorghum declined from 76 to 69 percent and for millet from 62 to 55 percent. Wheat flour quality improved from 67 to 75 percent.

Figure 4: Cereal and wheat flour quality scores, February - July 2025



Vegetables

Figure 5 shows that vegetable prices rose sharply in July, with tomato prices increasing the most. This coincided with a decline in availability: the share of traders reporting high availability of tomatoes dropped from 80 percent in February to 34 percent in July (Figure 7). Potato prices also rose steadily and remained the highest among vegetables. Onion prices increased moderately in July and showed variation across states, with higher levels recorded in North Darfur and Northern State.

Figure 5: Local prices of vegetables, weekly average, SDG/Kg, February - July 2025

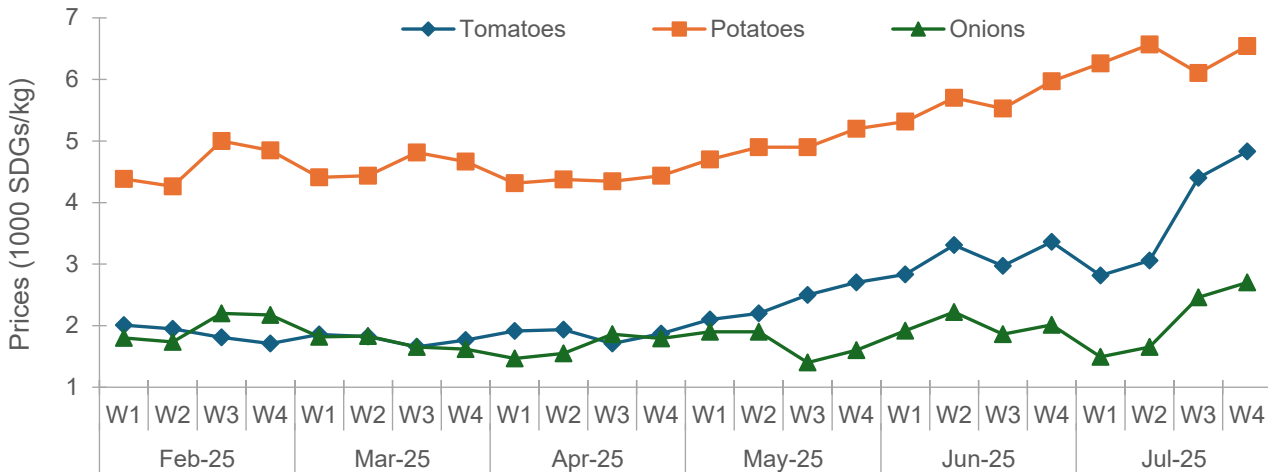


Figure 6 shows marked regional disparities in vegetable prices in June and July. Tomato prices rose across most states, with the highest levels in West Darfur, North Kordofan, Sennar, and Gedaref. Potato prices also showed wide regional variation, peaking in Sennar, North Kordofan, and North Darfur. Onion prices increased moderately, with the highest prices in North Darfur and Northern State.

Figure 6: Local monthly average prices of vegetables across states, 1000 SDG/Kg, June - July 2025

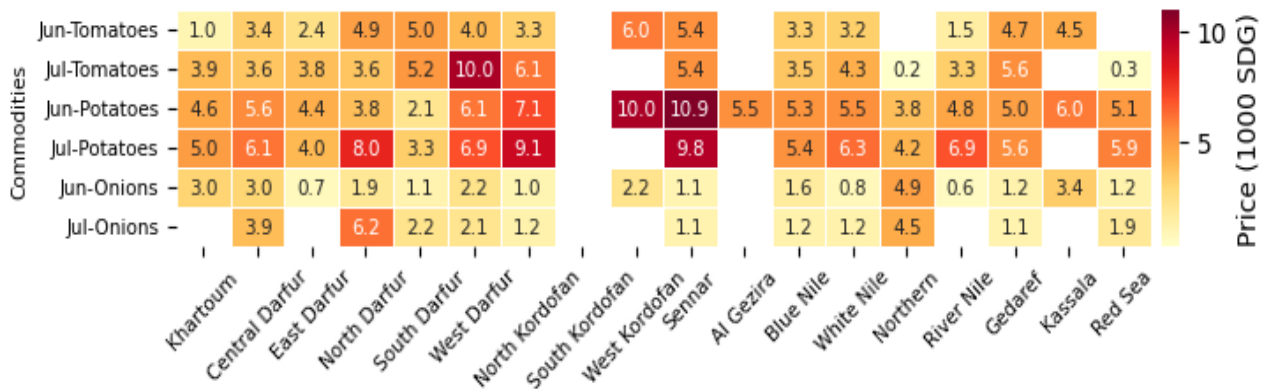


Figure 7 shows that tomato high availability scoring dropped from 80 percent in February to 28 percent in June, with a slight recovery to 34 percent in July. Reports of low availability rose from 5 percent in February to 37 percent in July. Potato high availability scoring improved modestly, rising from 29 percent in June to 33 percent in July. Onion high availability scoring decreased from 71 percent in May to 60 percent in June and 51 percent in July.

Figure 7: Vegetable availability scores, February - July 2025

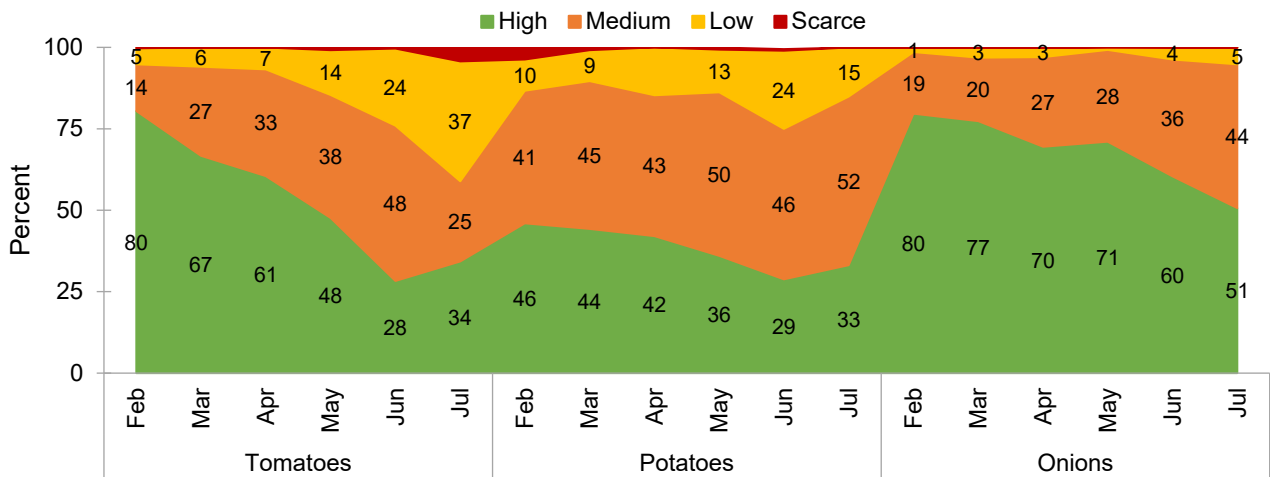
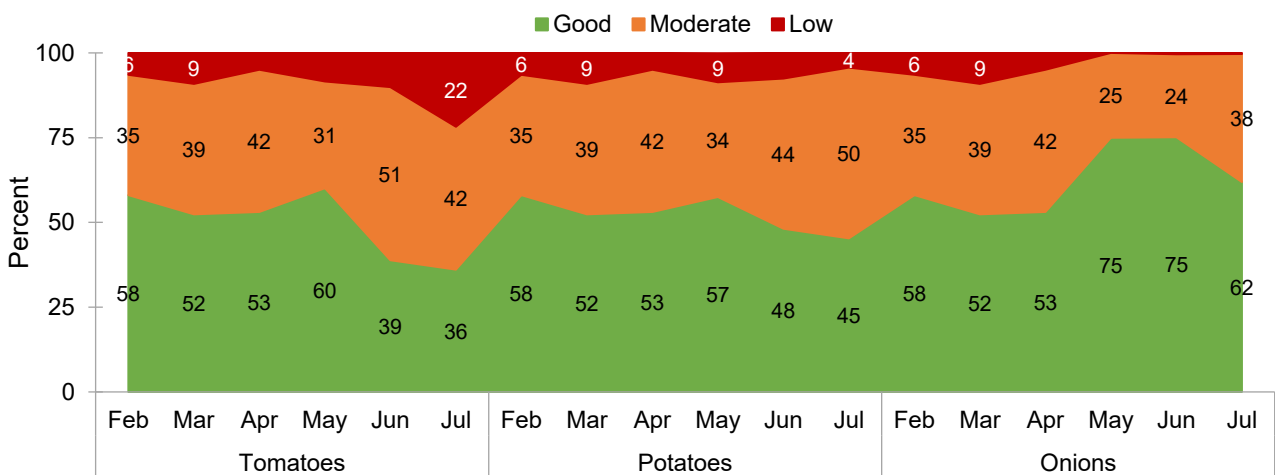


Figure 8 shows a decline in perceived tomato quality, with good-quality reports falling from 60 per cent in May to 39 per cent in June and 36 per cent in July. Potato quality also declined, with good-quality ratings dropping from 57 per cent in May to 45 per cent in July, while moderate-quality ratings increased. Onion quality remained relatively high, with 62 per cent of traders rating it as good in July.

Figure 8: Vegetable quality scores, February - July 2025



Meat and Animal Products

Figure 9 shows that between February and July 2025, lamb prices rose steadily, while beef prices increased in June and early July before declining slightly later in July. Chicken prices remained relatively stable in June and July, with minor fluctuations. Fish prices stayed lower than other meats, with a small increase in early July. Milk prices rose slightly compared to June and remained stable through July. Egg prices increased gradually and consistently over the period.

Figure 9: Local prices in SDGs of meat and animal products, weekly average, February-July 2025

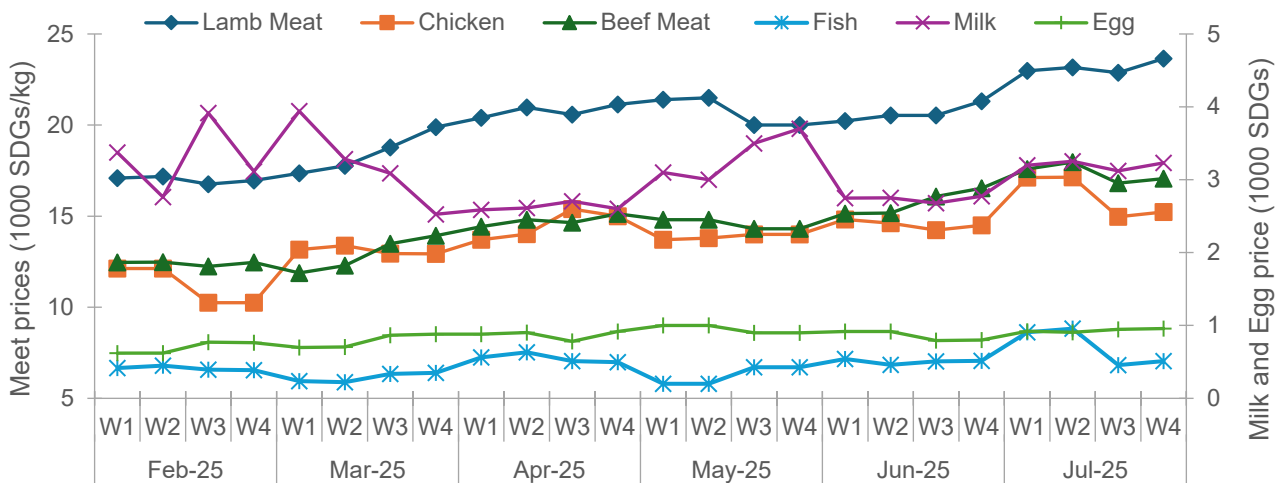


Figure 10 shows regional disparities in July. Lamb prices were highest in Red Sea and River Nile and lowest in Darfur states, with Red Sea nearly three times higher than North Darfur. Chicken prices decreased in Khartoum and Central Darfur but increased in North Kordofan, Blue Nile, White Nile, Kassala, and Red Sea. White Nile recorded the highest chicken price, while East Darfur had the lowest. Beef prices rose slightly in most states, with the highest in White Nile, more than double the lowest in North Darfur. Fish prices decreased slightly in Khartoum and Blue Nile, were lowest in Kassala, and increased in other states.

Figure 10: Local prices of meat and animal products across states (1000 SDGs), June - July 2025.

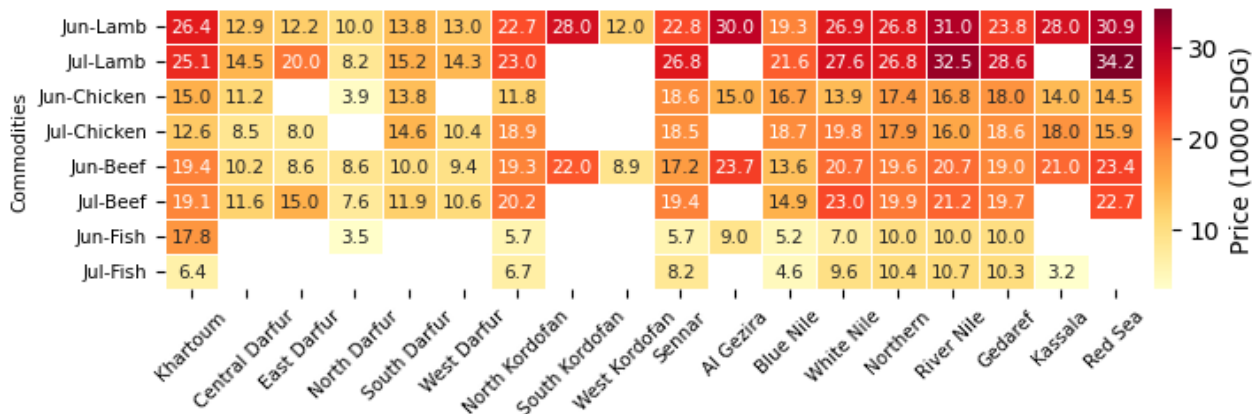


Figure 11 shows that lamb high availability scoring declined steadily since May, and beef high availability scoring declined since February. By contrast, chicken, fish, milk, and egg high availability scoring increased in July compared to June, with most traders reporting high or medium availability.

Figure 11: Meat and animal products availability scores, February - July 2025

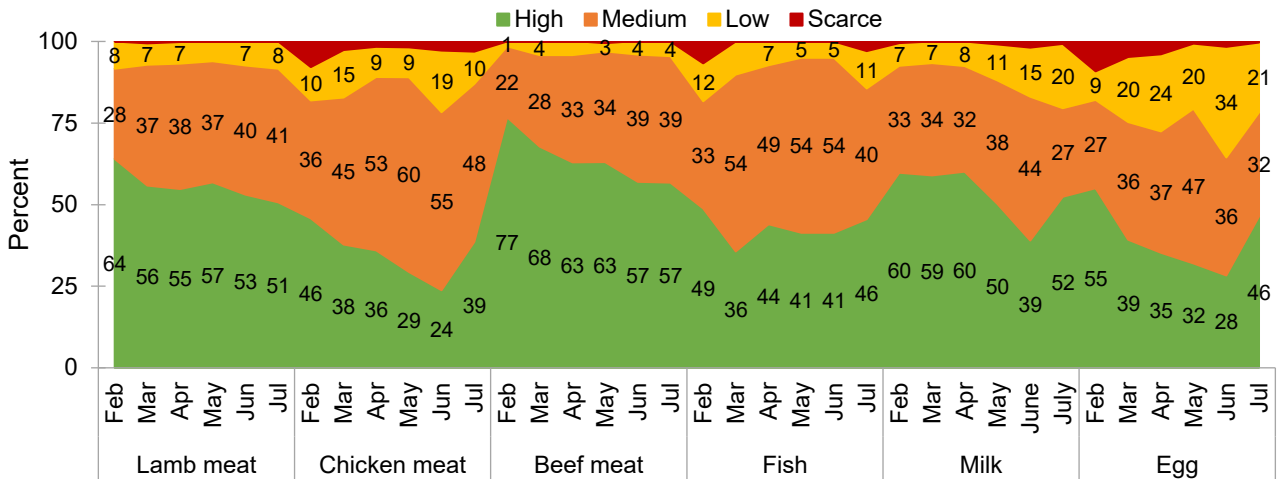
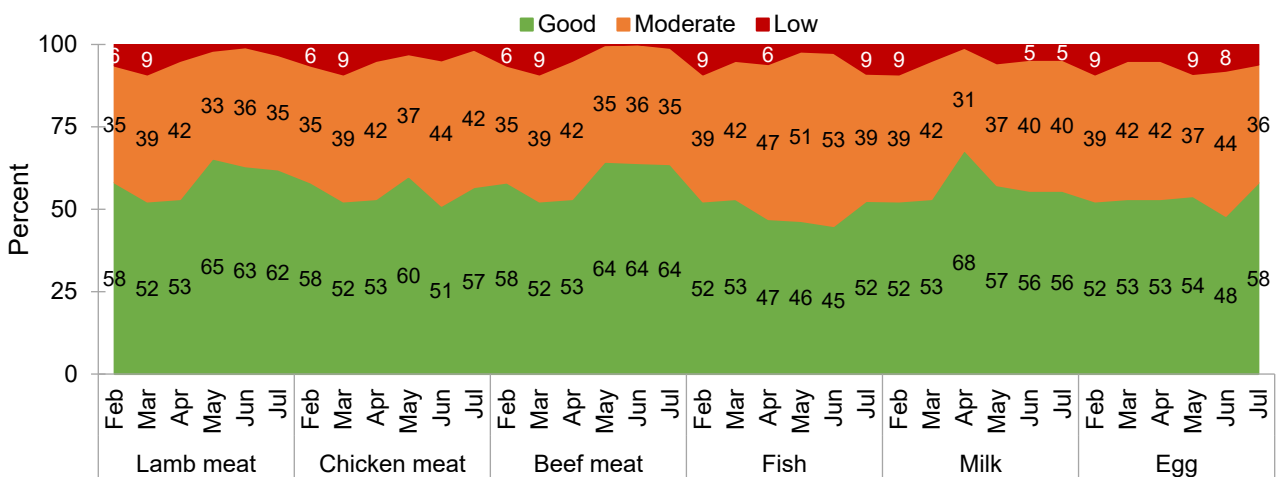


Figure 12 shows that lamb, beef, chicken, and milk quality generally improved between February and July. Milk and egg quality improved gradually, with more traders reporting good or moderate quality by July. Reports of low-quality products declined overall but increased for fish in July and were higher for eggs in February, May, and June.

Figure 12: Meat and animal products quality scores, February - July 2025



Oilseeds, Cooking Oils, Sugar, and Fava Beans

Figure 13 shows that sugar prices stayed high in June and peaked at the end of July. Cooking oil prices increased steadily from the third week of June. Fava beans remained the highest priced commodity in this group, averaging around 6000 SDG/kg. Sesame prices stayed stable. Groundnut prices were stable except for a sharp decline in mid-May. Sunflower prices were volatile, falling in February, rising in March, and increasing again in late July.

Figure 13: Local prices (1000 SDGs) of oilseed (Kg), cooking oils (Liter), sugar (Kg), and fava beans (Kg), February - July 2025

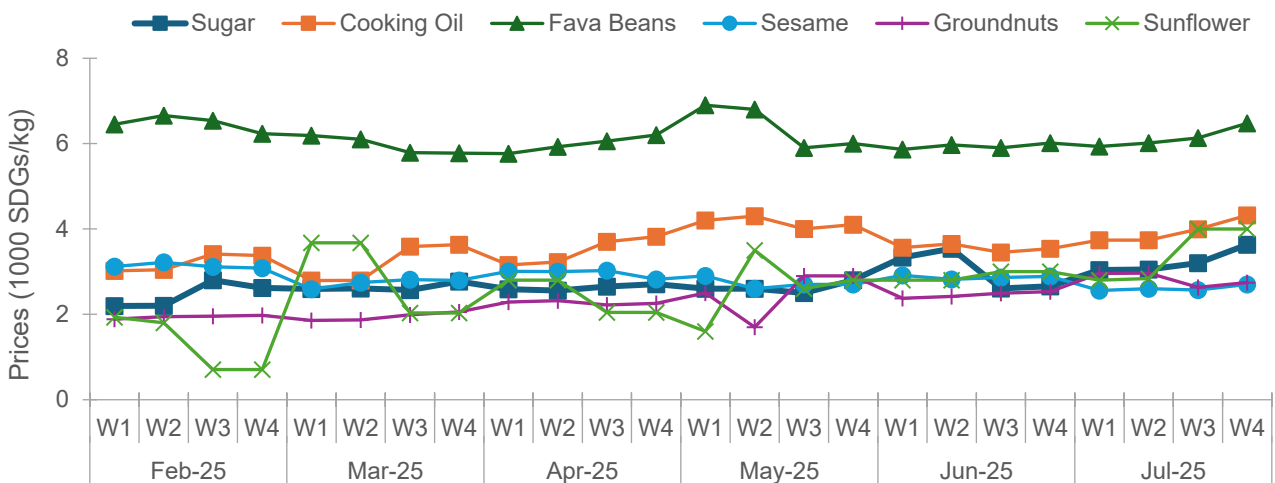


Figure 14 shows regional differences between June and July. Sugar prices dropped in Northern State but increased sharply in Sennar and Red Sea. South Darfur recorded the highest sugar price at 4,200 SDG/kg in July, while East Darfur had the lowest. Cooking oil prices rose most in White Nile and declined most in Red Sea. Kassala recorded the highest cooking oil price, nearly seven times higher than South Darfur. For sesame, Blue Nile saw the largest increase and the highest July price. Groundnut prices rose steeply in White Nile, where they were more than ten times higher than in East and South Darfur. Fava bean prices increased in West Darfur but declined slightly in Sennar, with White Nile recording the highest July price.

Figure 14: Oilseeds, cooking oils, sugar, and fava beans prices (1000 SDGs) across states, June - July 2025

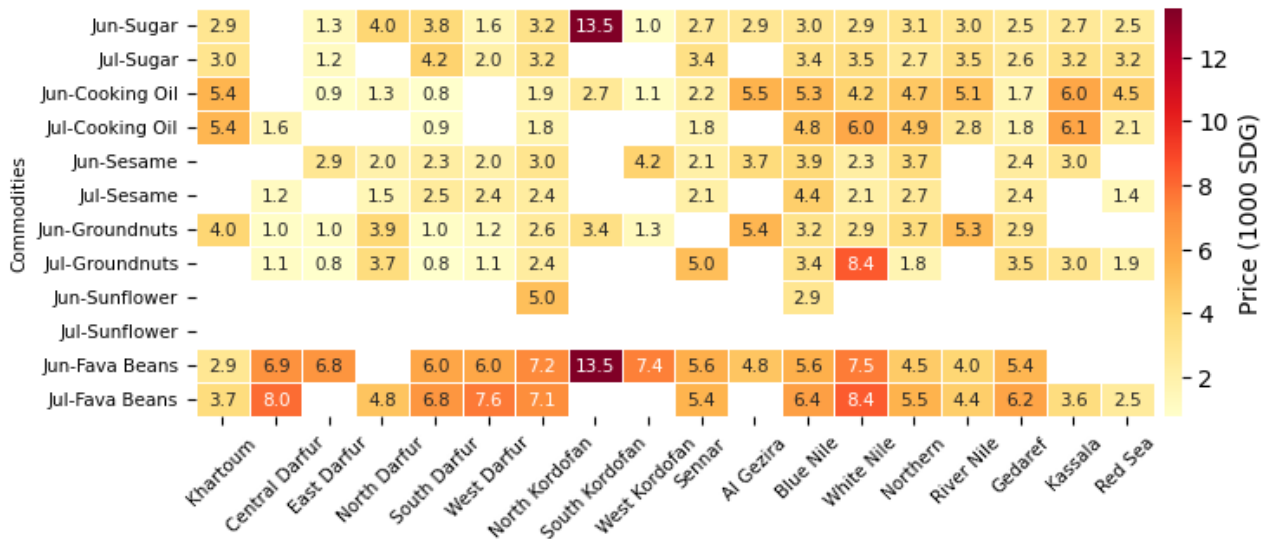


Figure 15 shows that sesame and fava bean availability stayed relatively stable, though high availability of sesame dropped sharply in July. Groundnut availability improved in June and July compared to May. Sunflower availability fluctuated, with many traders reporting low availability. Cooking oil availability declined through June. Sugar availability increased in July compared to June.

Figure 15: Oilseeds, cooking oils, sugar, and fava beans availability scores, February - July 2025

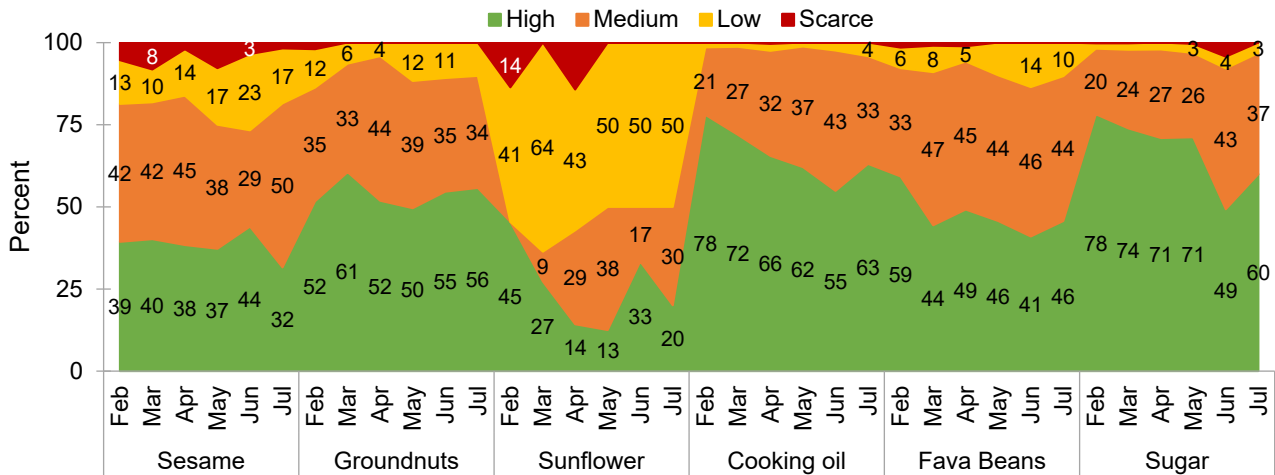
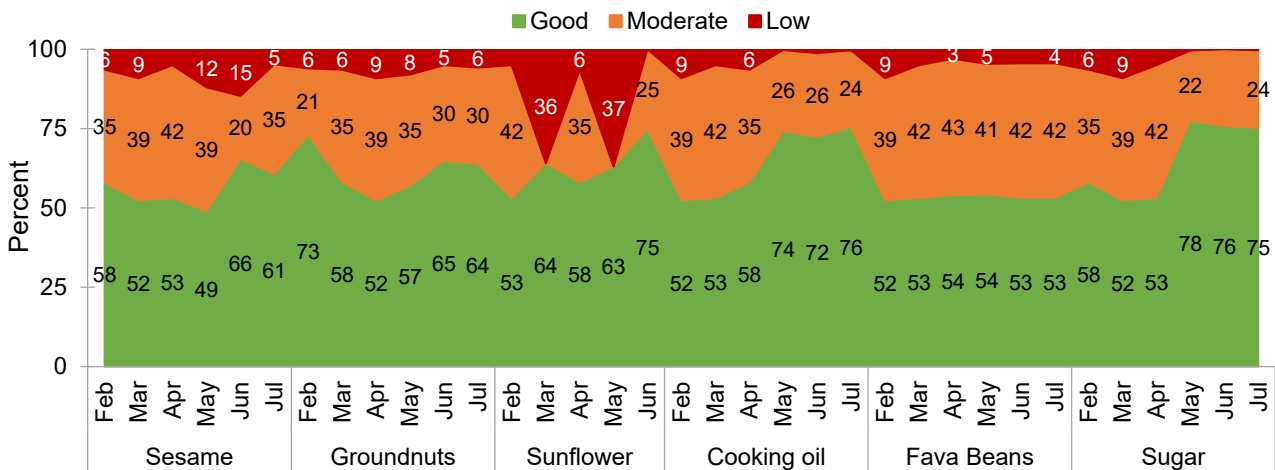


Figure 16 shows that cooking oil quality improved in June and July. Fava bean quality remained stable. Most commodities were reported as medium or good quality, with few low-quality reports, except for sunflower, which recorded more low-quality ratings in March and June.

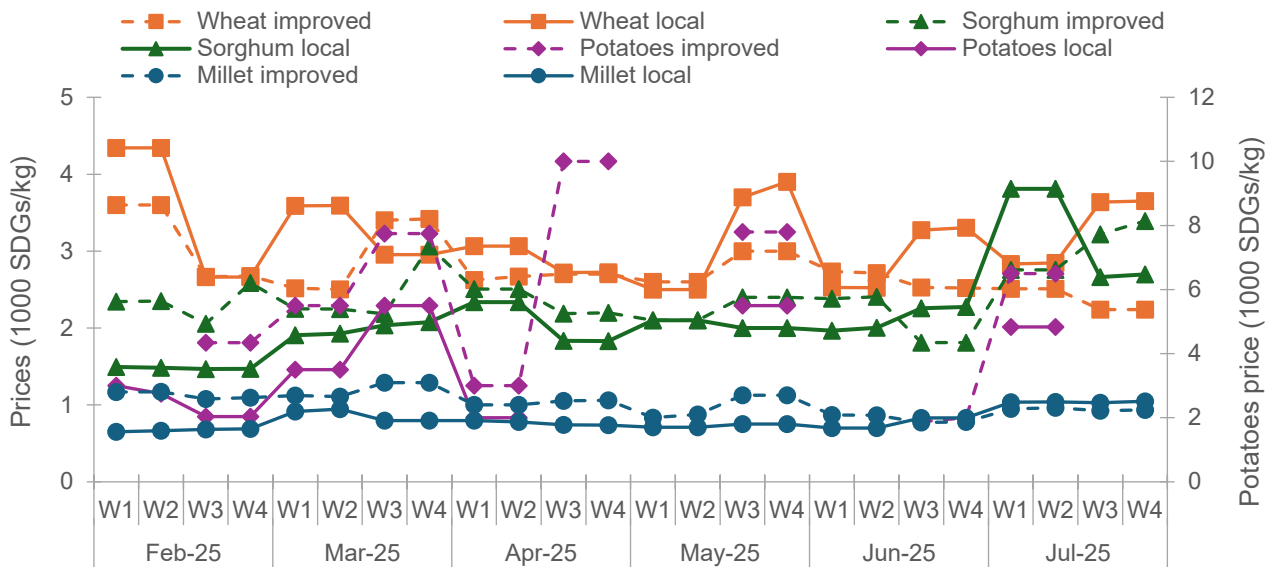
Figure 16: Oilseeds, cooking oils, sugar, and fava beans quality scores, February - July 2025



Improved and Local Seeds

Figure 17 shows that local wheat seed prices fluctuated, falling in early July before rising again toward the end of the month. Improved wheat seed prices were relatively stable from February to July, with a slight decline in the last two weeks. Local wheat seeds were consistently priced higher than improved varieties. Sorghum seed prices for both varieties spiked sharply at the beginning of July; local sorghum later stabilized, while improved sorghum continued to increase. Millet showed contrasting patterns: improved seed prices declined steadily, while local seed prices rose modestly toward the end of July.

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



Diesel and Petrol

Figure 18 shows that fuel prices in both regular and parallel markets dropped sharply from Week 3 of June, reaching their lowest in early July, and rebounded in Week 3 of July. Parallel market prices stayed consistently higher than regular market prices for both diesel and petrol.

Figure 18: Local fuel prices, SDGs/Liter, monthly average, February - July 2025

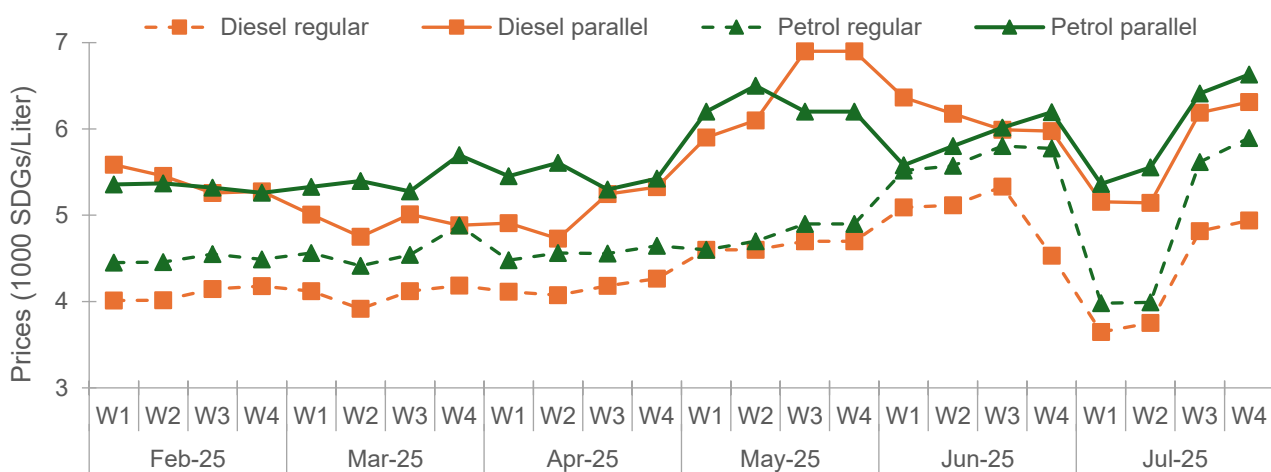


Figure 19 shows disparities in fuel prices across states in June and July. Parallel market prices were highest in Darfur states. In July, diesel parallel prices exceeded 10,000 SDG/liter in East Darfur, while in Blue Nile and Gedaref they remained below 4,000 SDG/liter.

Figure 19: Fuel prices across states, 1000 SDGs/Liter, June - July 2025

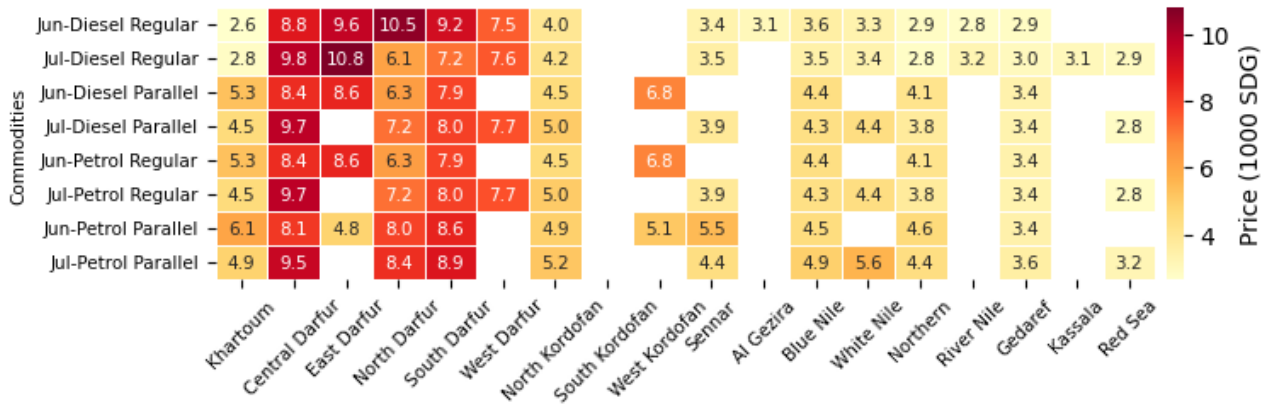
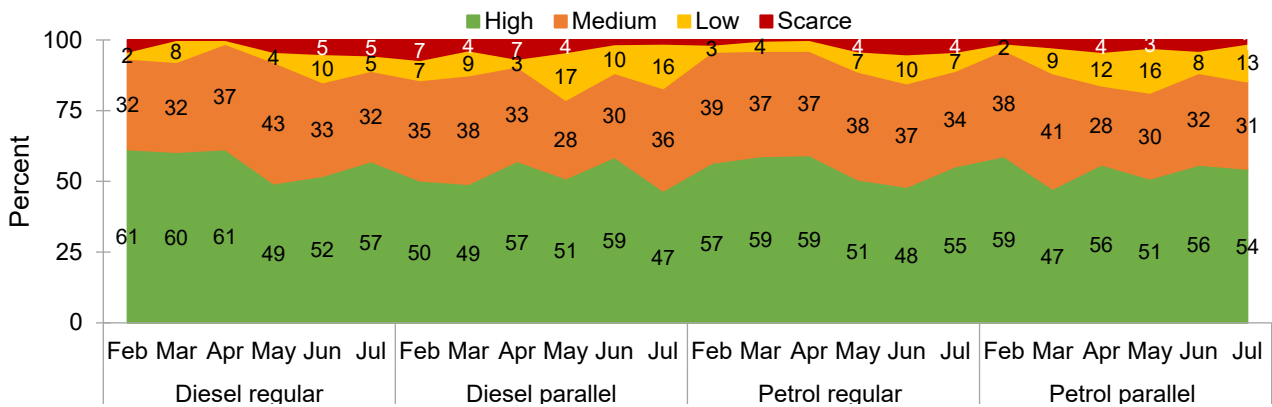


Figure 20 shows that fuel availability perceptions stayed relatively stable. Diesel availability increased in the regular market between June and July but declined slightly in the parallel market. A similar pattern was observed for petrol.

Figure 20: Fuel availability scores, February - July 2025



Exchange Rates

Figure 21 shows that both official and parallel exchange rates increased steadily between February and July 2025, with a sharp rise in July. The gap between official and parallel rates remained relatively consistent.

Figure 21: Exchange Rate, SDG/US Dollar, February - July 2025

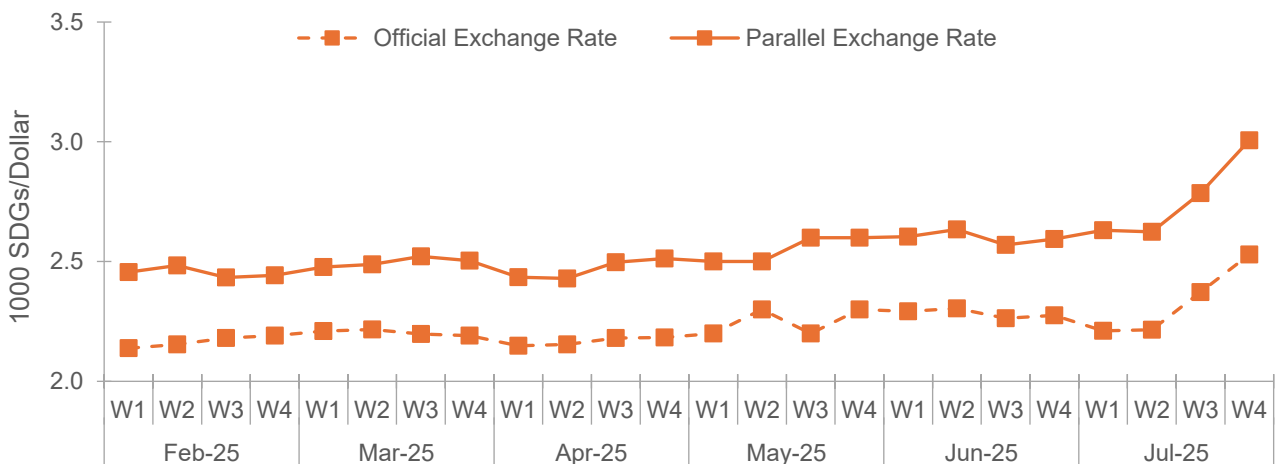
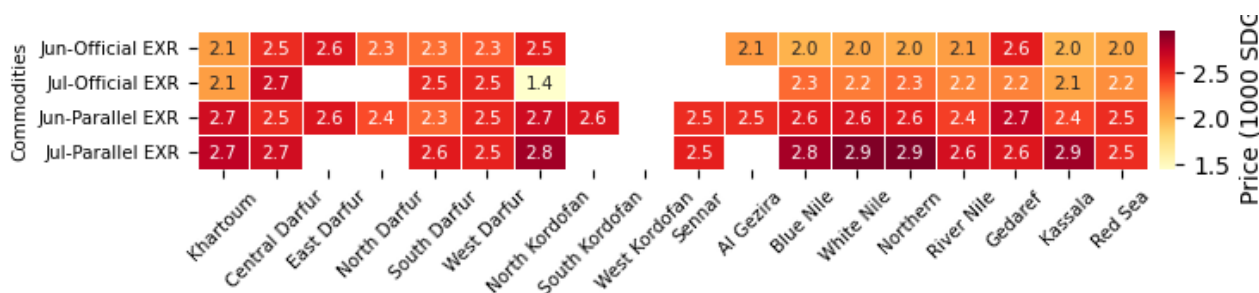


Figure 22 shows regional variations in June and July. Parallel rates were consistently higher than official rates across all states. In July, parallel rates exceeded 2,500 SDG/USD in all states, peaking at 2,900 in White Nile and Northern states. Official rates were more stable but varied: in July, North Kordofan dropped to 1,400 SDG/USD, while Central Darfur reached 2,700 SDG/USD.

Figure 22: Units of 1000 SDGs to one US dollar exchange rates across states, June - July 2025



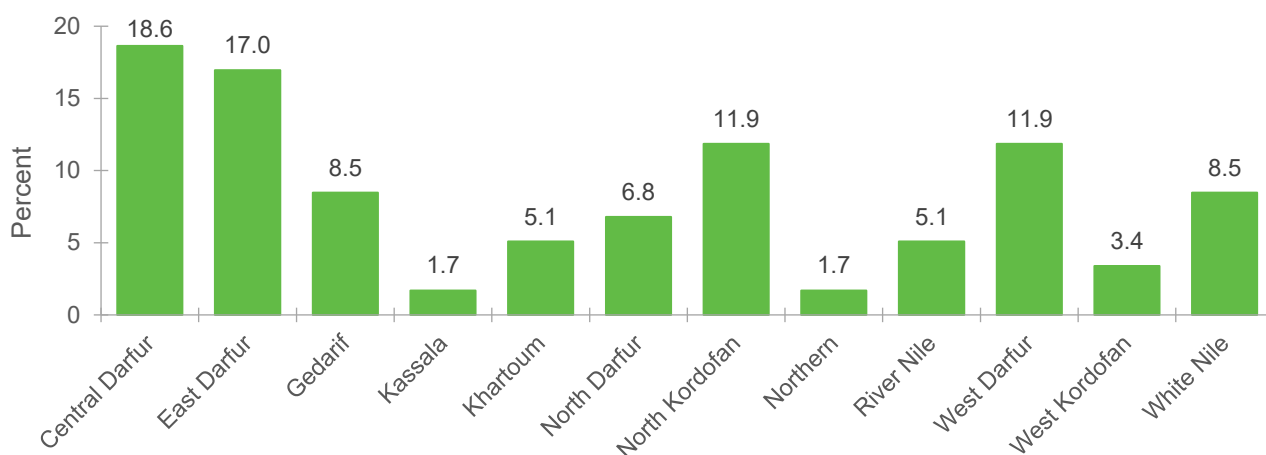
Market Actors' Perception

In July 2025, 138 traders across 15 states were surveyed. Of these, 56 percent reported medium-sized operations, 24 percent large-scale, and 20 percent small-scale. Traders reported continued disruptions in domestic trade due to high costs, reduced purchasing power, storage concerns, and logistical constraints. Fuel price increases, power cuts, and the rainy season also shaped perceptions.

Supply Chain and Logistical Challenges

About 43 percent of surveyed traders reported transportation and supply chain challenges (Figure 23). The share varied by state.

Figure 23: Proportion of traders facing supply chain challenges, by state (N=59)



Traders in Central Darfur, East Darfur, West Darfur, and North Kordofan reported the highest supply chain challenges. They cited delays from the rainy season, road closures, security checks, and limited truck supply. Some reported delays of up to three months for goods from Al-Dabba. In Gedaref, Kassala, Khartoum, Northern, River Nile, and White Nile, traders reported high transportation costs during the rainy season. Traders in Red Sea reported no transportation challenges.

Changes in Demand for Key Commodities

Overall, 53 percent of traders reported no change in demand for commodities in July, while 47 percent reported changes. Traders in North Kordofan, White Nile, and Sennar reported no demand

changes. Traders in West Darfur, Central Darfur, River Nile, and East Darfur reported demand changes. In Darfur, many traders reported declines due to high prices and low incomes. In West Darfur, the rainy season further reduced demand by limiting access to markets. In River Nile, demand for agricultural inputs increased, but food demand declined due to cash constraints and reverse migration of IDPs.

Financial and Liquidity Challenges

Across all 15 states, 61 percent of traders reported no liquidity challenges. West Darfur (83 percent), Central Darfur (68 percent), and Gedaref (60 percent) had the highest shares facing challenges. In Darfur, traders linked challenges to bank closures and limited old banknotes. In Gedaref, limited bank cash allowances and cash-based imports caused delays. Traders in several states also noted that using “Bankak” was more expensive than cash payments.

About 54 percent of traders reported hiring labor. Almost all did not face challenges paying workers. Minimal challenges were reported in Red Sea and Khartoum.

Storage, Safety, and Security

About 90 percent of traders reported no storage challenges in July. However, 42 percent in Central Darfur, 40 percent in Khartoum, and 20 percent in Red Sea faced challenges. In Central Darfur, traders cited limited access and theft risks. In Khartoum, traders reported poor-quality facilities and rain damage. In Red Sea, power cuts affected commodities needing cold storage.

Market safety improved in July, with 7 percent of traders reporting insecurity, compared to higher levels earlier in 2025. Security challenges were highest in Central Darfur (33 percent), Khartoum (20 percent), and North Darfur (20 percent). Traders in these states reported theft, looting, and nearby combat risks.

Profits and Payments for Government

Figure 24 shows that most traders (48 percent) reported no change in profits in July compared to June. Among those reporting losses of up to 50 percent, 67 percent were in North Darfur. Most traders with no change in profits were in North Kordofan (18 percent) and River Nile (15 percent). Profit increases were reported in Khartoum, Sennar, and Northern State.

Figure 24: Changes in traders’ profits in July 2025

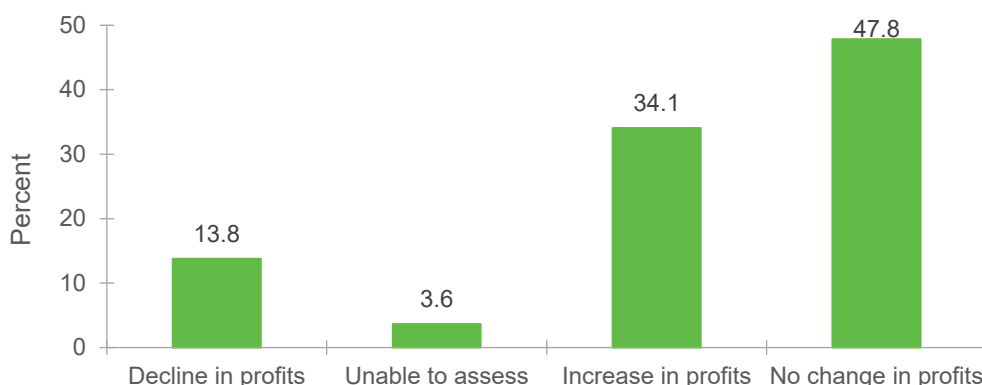
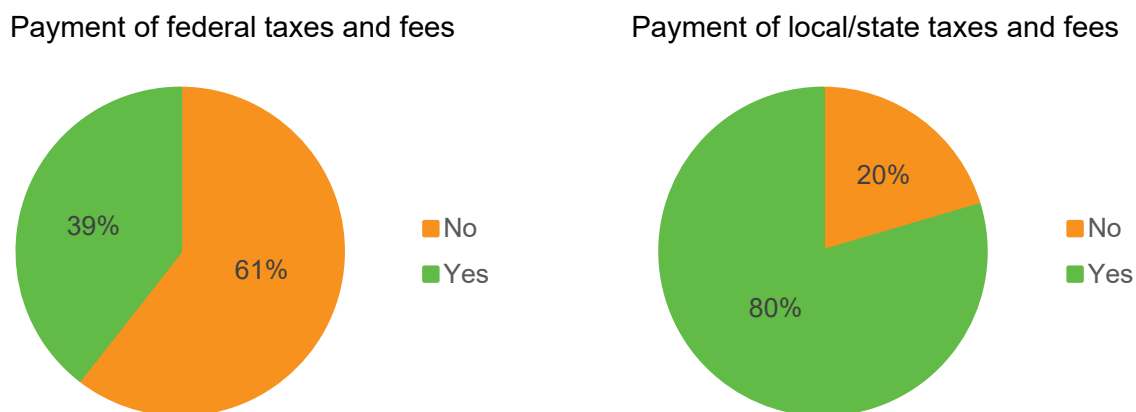


Figure 25 shows that about 80 percent of traders reported paying local and state taxes, while 39 percent reported paying federal taxes. Traders reported paying multiple types of taxes, including value-added tax, customs duties, federal trade licenses, annual profit taxes, and sales taxes. Locality taxes for cleaning, health, and market organization, as well as state-level licenses, were also noted. Many traders also reported paying zakat, particularly in Northern, River Nile, Blue Nile, and Red Sea.

Figure 25: Payments of federal and local taxes and government fees



Traders noted that taxes contribute to higher prices. About 61 percent of traders viewed federal fees, and 68 percent viewed state and locality fees, as beneficial to sustaining market operations, despite concerns about the adequacy of services provided.

Traders' Future Plans

About 53 percent of traders reported that they plan to continue trading at the same volume and location over the next 1–3 months. Around 20 percent intend to increase trade, especially in Khartoum, Sennar, and North Kordofan. About 10 percent in East Darfur and River Nile plan to reduce trade, citing insecurity in East Darfur and reverse migration in River Nile.

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