SUDAN

IFPRI

INTERNATIONAL FOOD POLICY RESEARCH INSTITUTE

MARKET PRICES AND AVAILABILITY REPORT (11) JANUARY 2026

Essential Commodities Prices, Availability, and Market Actors' Perceptions

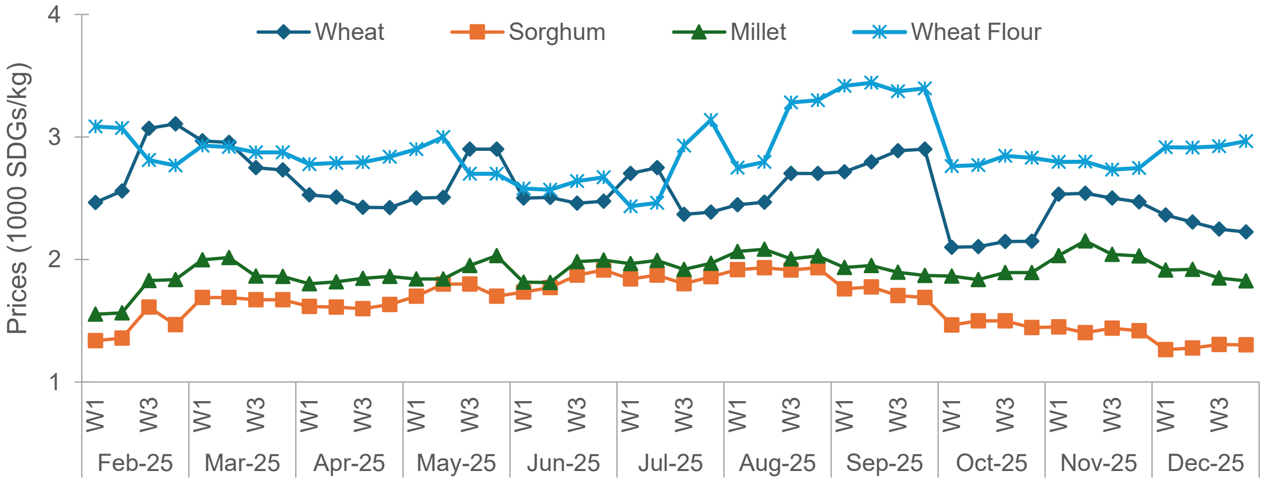
December 2025

Shima Mohamed, Halefom Yigzaw Nigus, Tarig Rakhy, Hala Abushama, Khalid Siddig

Cereals and Flour

Between November and December 2025, wheat and millet prices declined, sorghum prices remained broadly stable at lower levels, while wheat flour prices edged upward slightly (Figure 1).

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



Wheat prices were highest in Blue Nile, Sennar, and Gedaref states, and lowest in Al Gezira and North Kordofan. Sorghum and millet prices remained relatively stable across states. Wheat flour prices were consistently highest in most Darfur states and in West Kordofan (Figure 2).

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

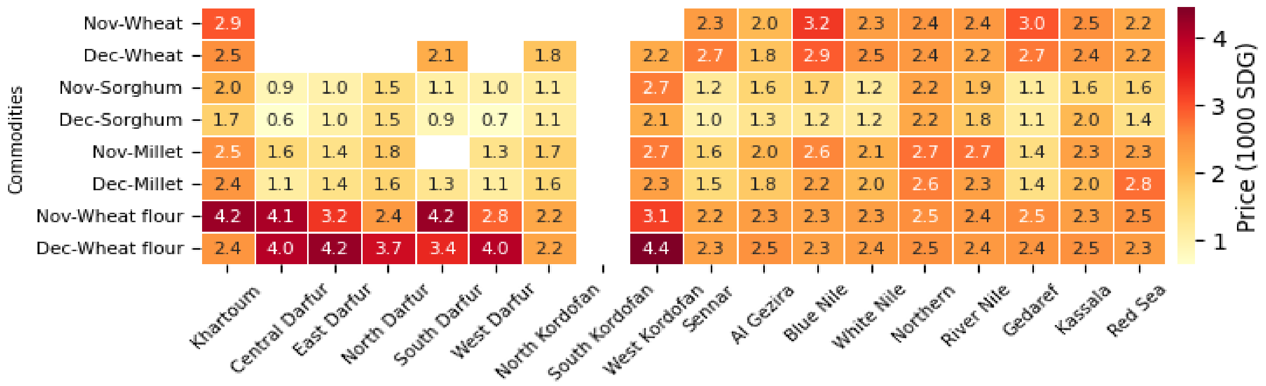
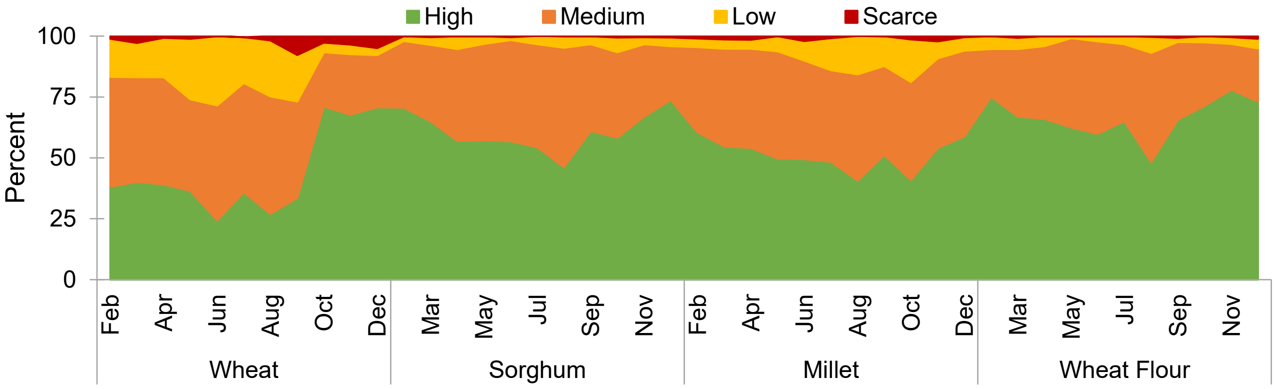


Figure 3 shows the perceived availability of cereals and wheat flour from February to December 2025. In December, the availability of wheat, sorghum, and millet saw the most notable improvements, with fewer traders reporting on low or scarce availability. In contrast, wheat flour availability declined slightly.

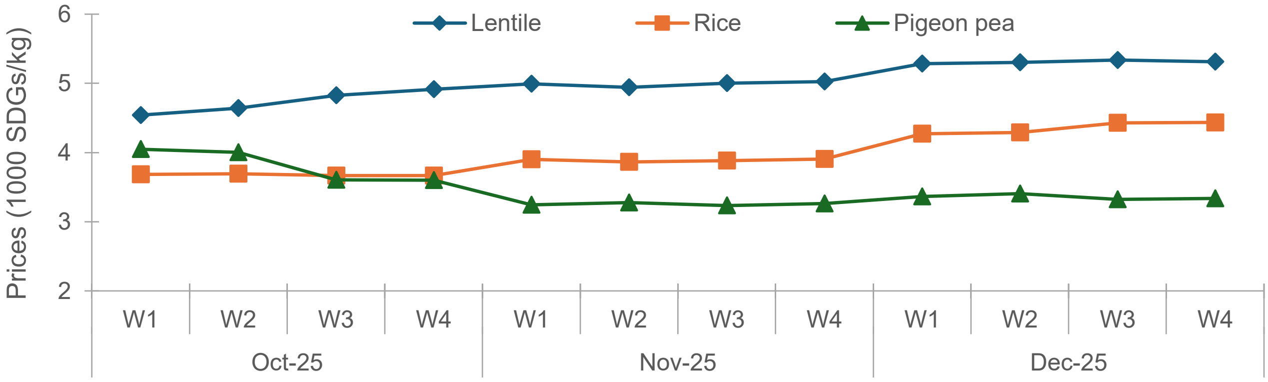
Figure 3: Cereals and wheat flour availability scores, February –December 2025



Lentils, Rice and Pigeon Peas

Figure 4 shows that weekly prices of lentils and rice increased between October and December, while pigeon pea prices declined in October before stabilizing in the following weeks.

Figure 4: Local prices of lentils, rice and pigeon peas, weekly average, 1000 SDG/Kg, October – December 2025



In December, rice and pigeon pea prices were highest in West Kordofan, while lentil prices reached their peak in West Darfur (Figure 50.

Figure 5: Local monthly average prices of lentils, rice and pigeon peas across states, 1000 SDG/Kg, November - December 2025

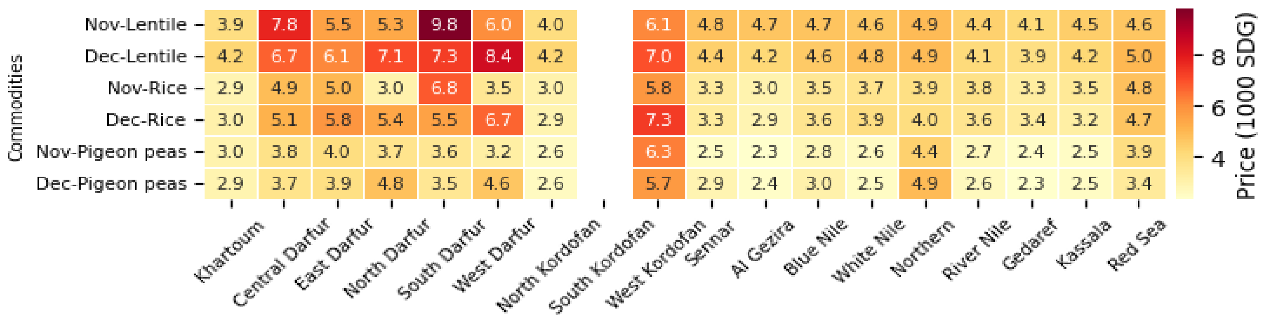
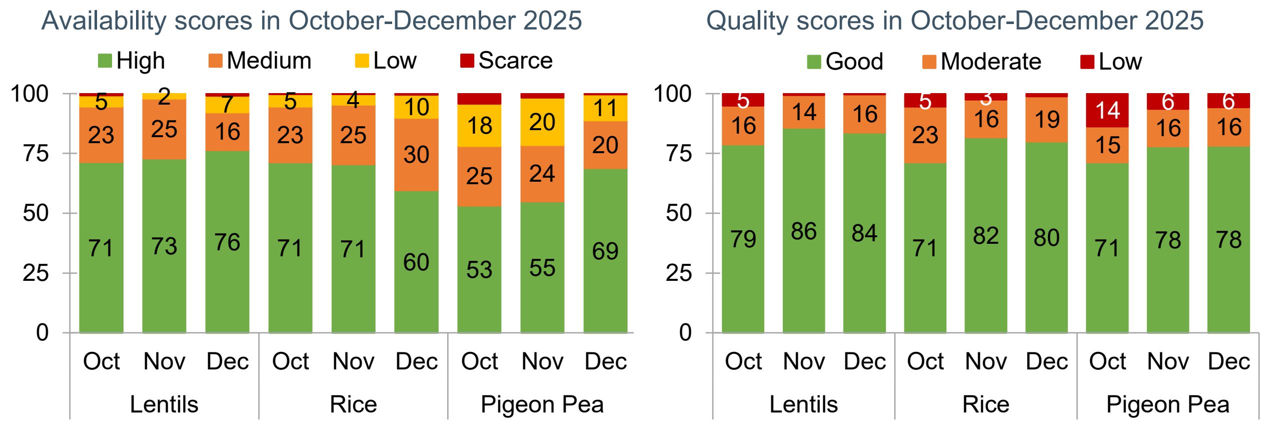


Figure 6 shows that by December 2025, perceived "high" availability increased for lentils and pigeon peas but declined for rice, while "good" quality ratings for all three commodities remained high.

Figure 6: Lentils, Rice, and Pigeon Peas availability and quality scores, October-December 2025



Vegetables

In December, tomatoes and onion prices decreased moderately compared to November. In contrast potatoes prices increased slightly in early December, then declined gradually (Figure 7).

Figure 7: Local prices of vegetables, weekly average, SDG/Kg, February - December 2025

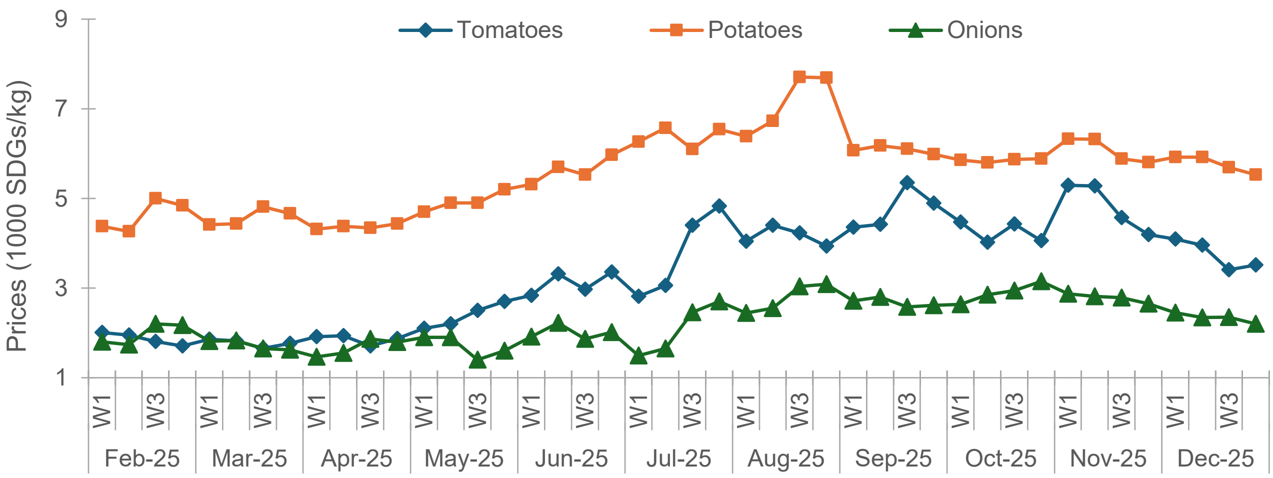
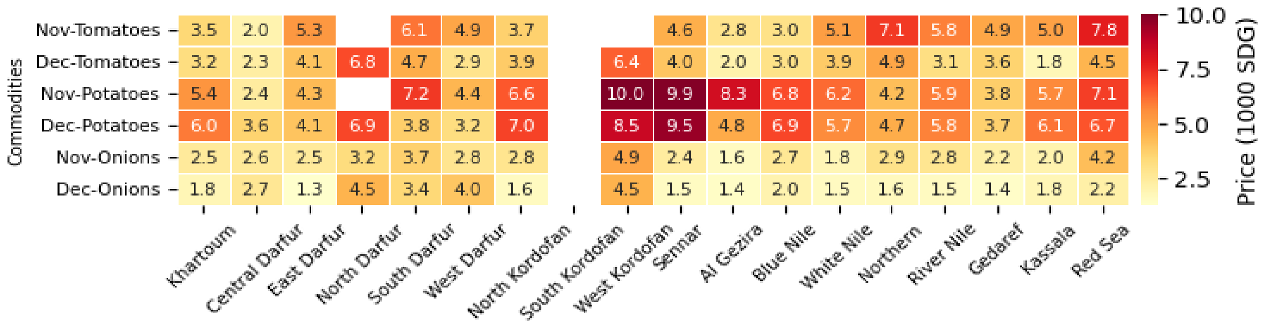


Figure 8 shows the highest prices of tomato are recorded in North Darfur and West Kordofan states, while the lowest recorded in Kassala and Al Gezira. Potato highest prices recorded in Sennar and

West Kordofan states. While onion prices showed moderate variation across states, with the highest prices recorded in West Kordofan, North, West and South Darfur states.

Figure 8: Local monthly average prices of vegetables across states, 1000 SDG/Kg, November-December 2025



The share of traders reporting high availability of tomatoes, potatoes, and onions increased from 57 percent for both tomatoes and potatoes, and 46 percent for onion in November to 76 percent, 60 percent, and 69 percent respectively in December (Figure 9).

Figure 9: Vegetable availability scores, February - December 2025

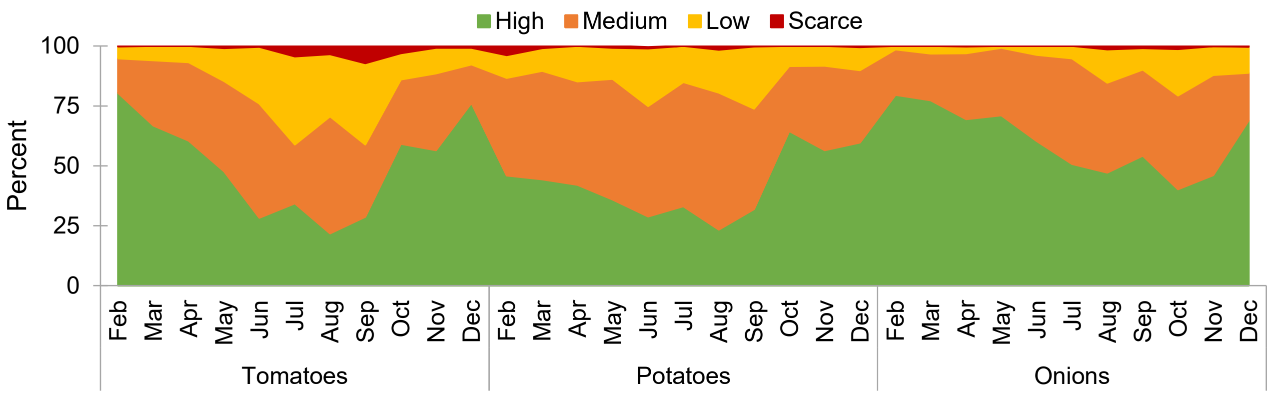
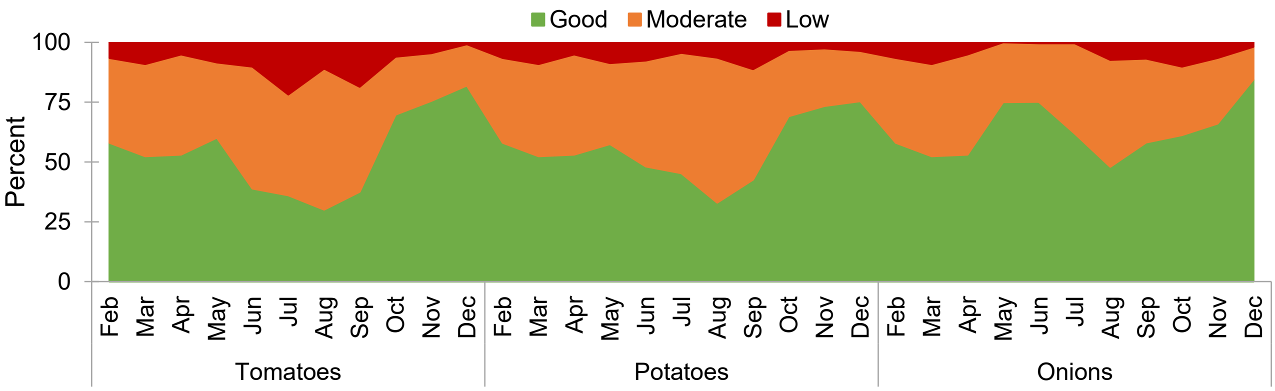


Figure 10 shows traders' perceptions of vegetable quality from February to December 2025, revealing persisted improvement across all commodities in December compared to November.

Figure 10: Vegetable quality scores, February - December 2025



Meat and Animal Products

Figure 11 shows that lamb, beef, chicken, and milk prices stabilized after October. Fish prices also stabilized in December following a peak in November, while egg prices remained steady throughout the period.

Figure 11: Local prices in SDGs of meat and animal products, weekly average, February-December 2025

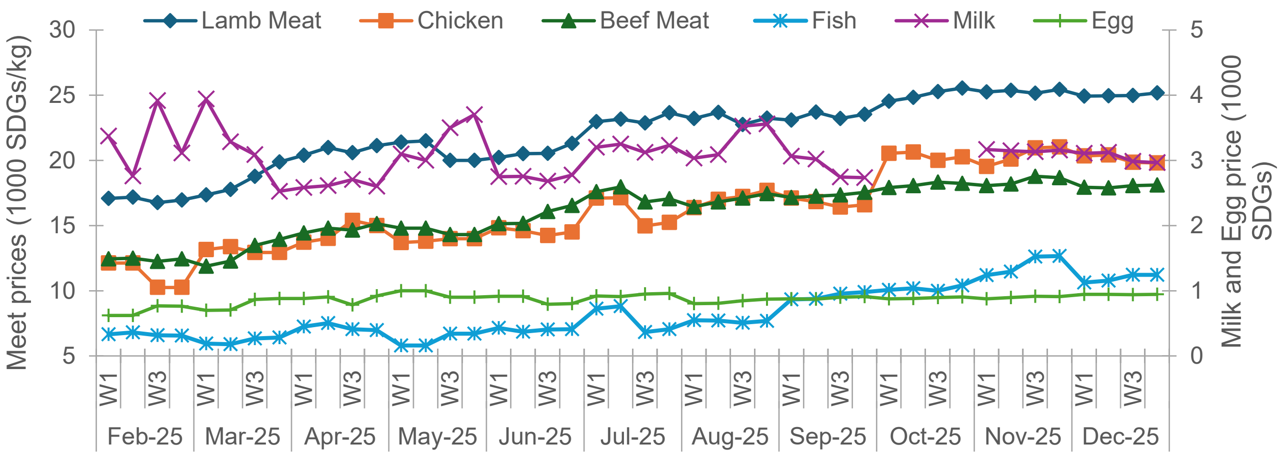


Figure 12 shows that in December, states in the Darfur region generally reported lower prices of animal products compared to other regions. Red Sea had the highest prices for lamb, beef, and fish, while Khartoum recorded the highest chicken price.

Figure 12: Local prices of meat and animal products across states (1000 SDGs), November-December 2025.

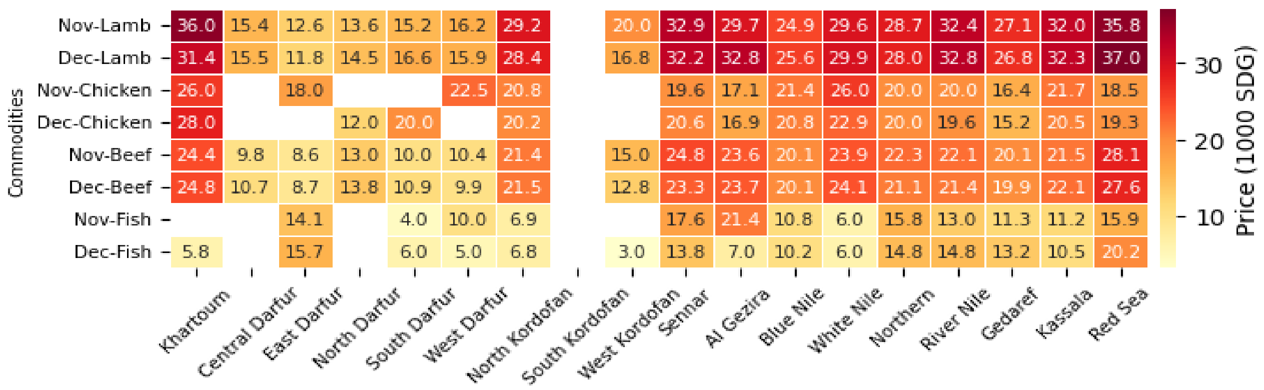
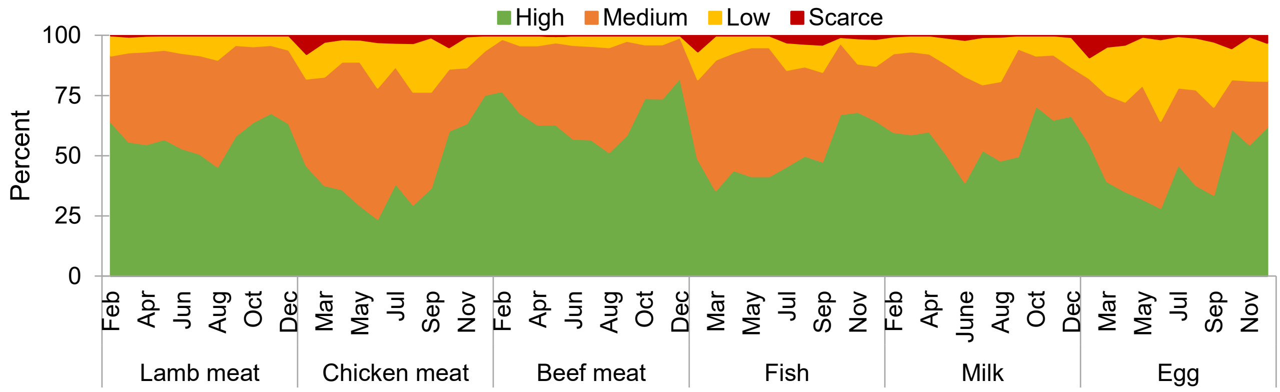


Figure 13 shows that in December, “high” availability increased for eggs and milk but declined for lamb and fish. Reported “high” availability of chicken and beef continued to rise steadily from September onward.

Figure 13: Meat and animal products availability scores, February - December 2025



Oilseeds, Cooking Oil, Sugar, and Fava Beans

Figure 14 shows that prices for sesame, groundnuts, sugar, and fava beans stabilized in November and December, while cooking oil prices spiked in November before easing in December.

Figure 14: Local prices (1000 SDGs) of oilseed (Kg), cooking oil (Liter), sugar (Kg), and fava beans (Kg), February – December 2025

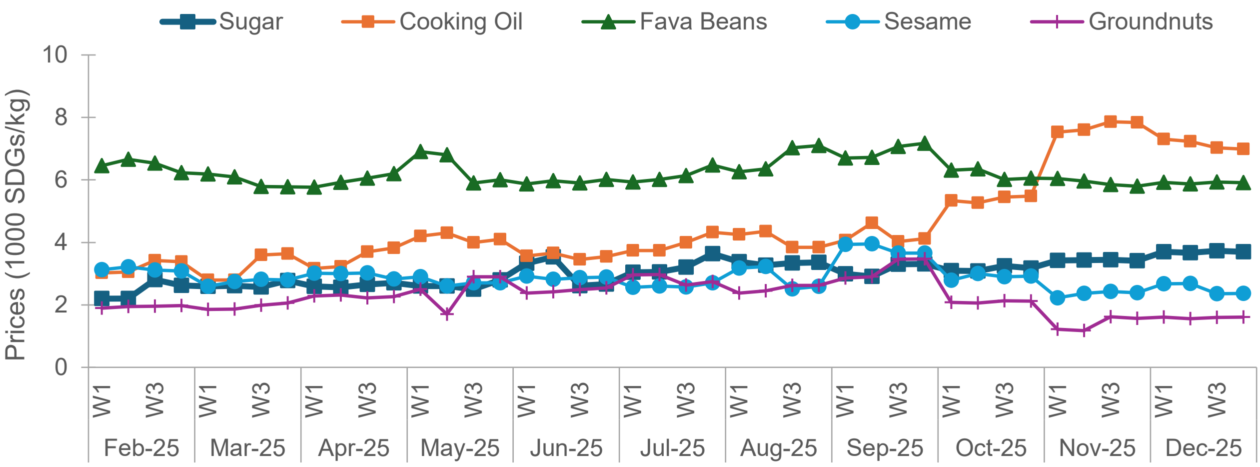


Figure 15 shows that in December, the highest cooking oil prices were recorded in White Nile, Northern, and Blue Nile. West Kordofan reported the highest prices for both fava beans and sugar. Sesame prices were highest in Khartoum and Al Gezira, while groundnut prices peaked in Sennar and White Nile.

Figure 15: Oilseeds, cooking oil, sugar, and fava beans prices (1000 SDGs) across states, November - December 2025

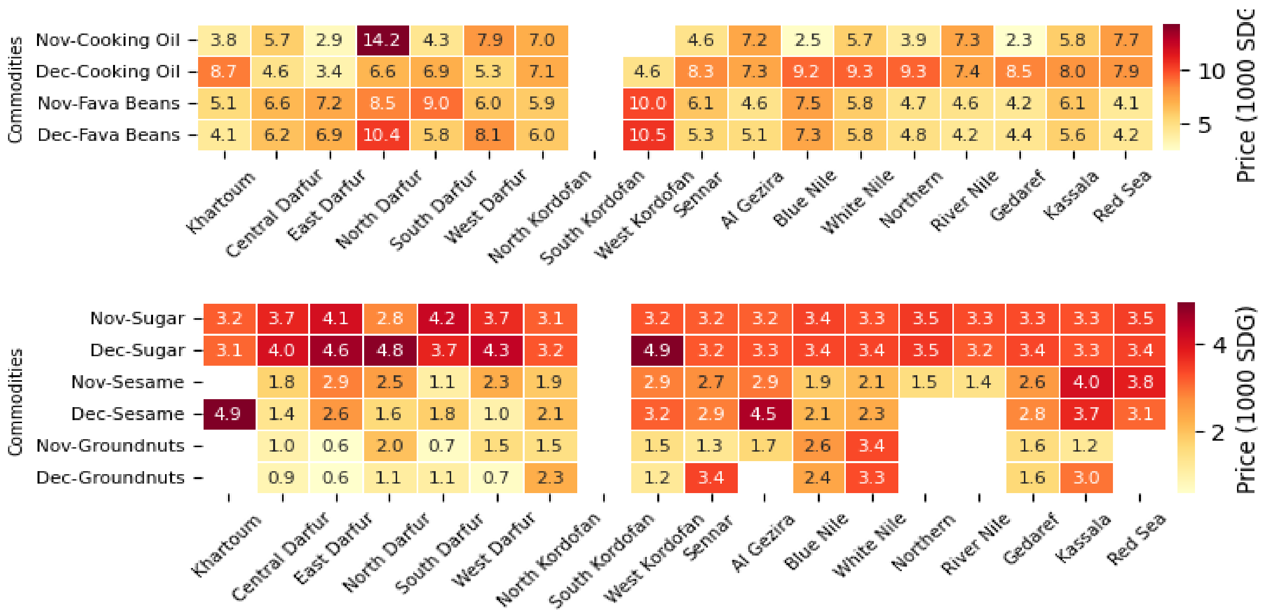
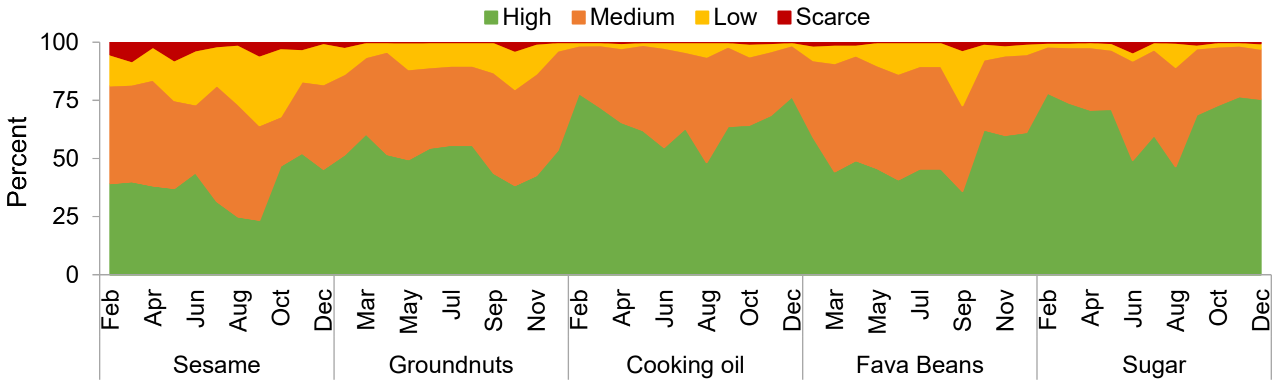


Figure 16 shows that trader-reported “high” availability for sugar and fava beans stabilized in the last three months, while it increased for cooking oil and groundnuts over the same period. For sesame, “high” availability declined in December.

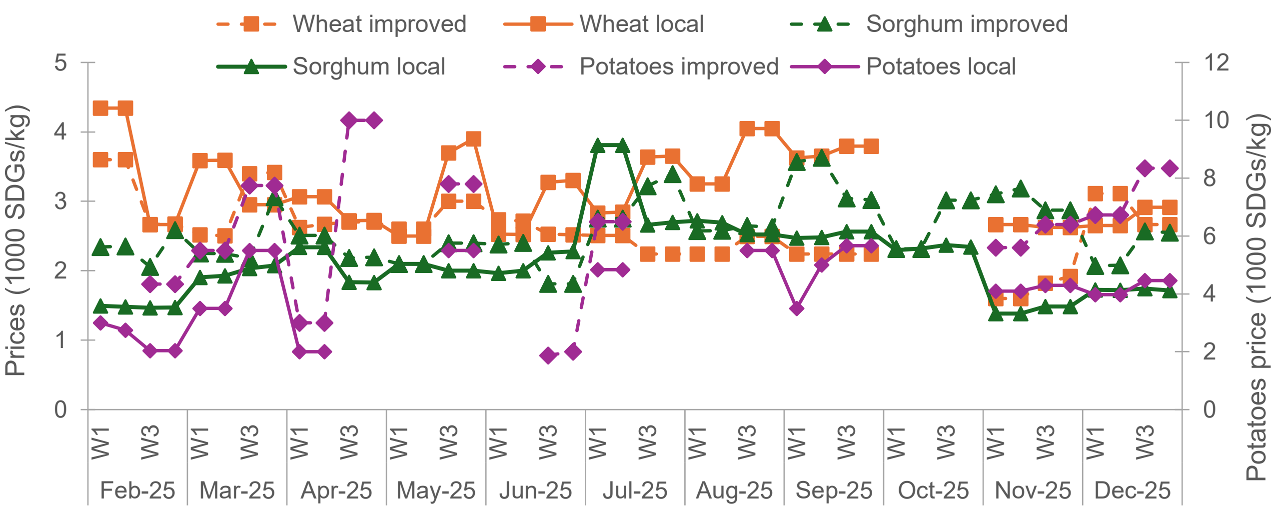
Figure 16: Oilseeds, cooking oil, sugar, and fava beans availability scores, February - December 2025



Seeds (Improved and Local)

Improved and local seed prices remained relatively stable in December, with improved sorghum and potato prices increasing toward the end of the month (Figure 17).

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



Fertilizers

Figure 18 shows that fertilizer prices increased relatively in December, the increase was more pronounced for DAP.

Figure 18: Fertilizer prices (1000 SDG/Kg), monthly average, February/May – December 2025

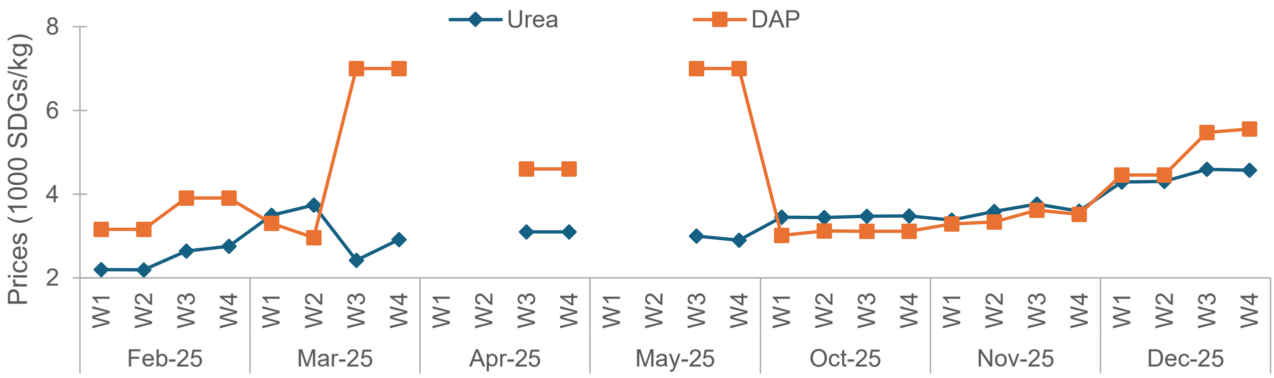
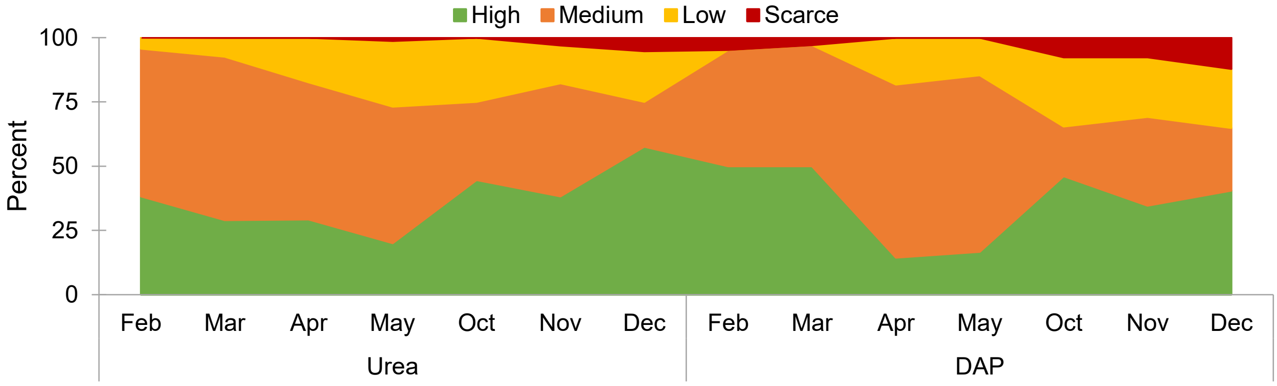


Figure 19 shows that the perceived high availability of fertilizers increased for both Urea and DAP compared to November levels. The share of traders reporting high availability of Urea and DAP increased from 35 percent and 38 percent in November to 41 percent and 58 percent, respectively, in December.

Figure 19: Fertilizer availability scores, February/May - December 2025



Diesel and Petrol

Fuel prices remained relatively stable between November and December, with only minor week-to-week fluctuations (Figure 20).

Figure 20: Local fuel prices, SDGs/Liter, monthly average, February – December 2025

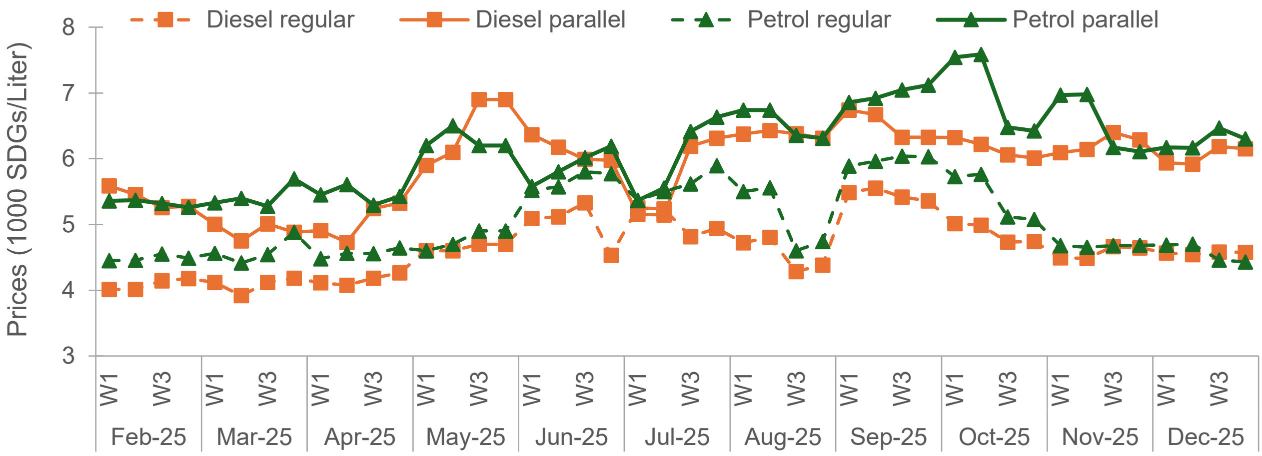
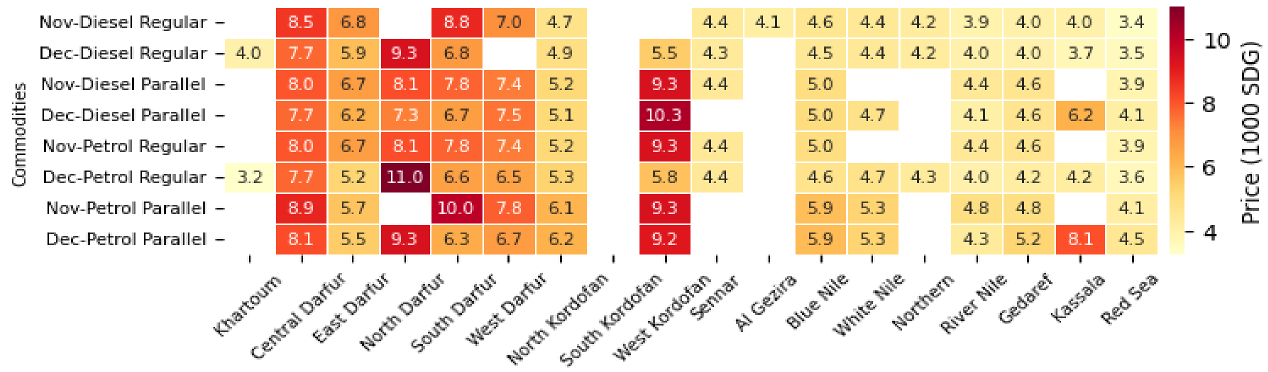


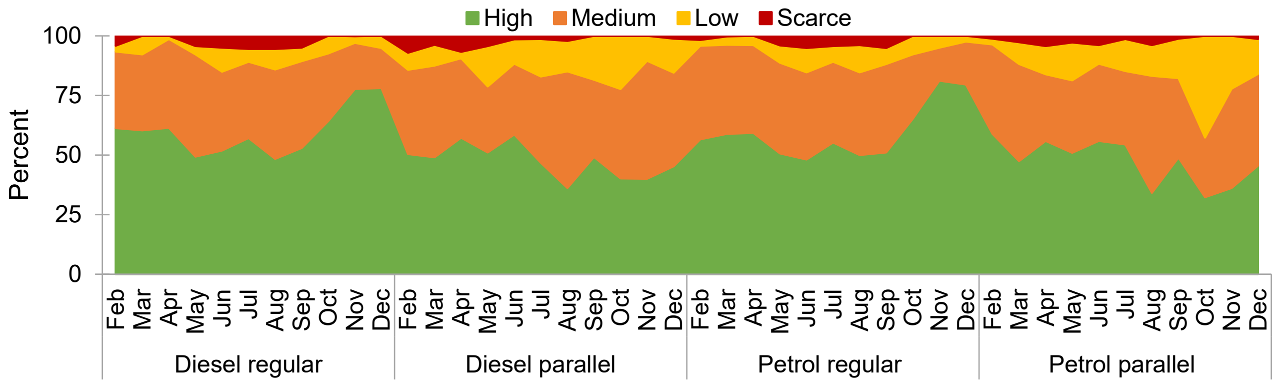
Figure 21 shows the spatial and temporal dynamics of fuel prices across states in November and December. Fuel prices remained substantially higher in the Darfur states and West Kordofan compared to other regions.

Figure 21: Fuel prices across states, 1000 SDGs/Liter, November -December 2025



For both diesel and petrol, the share of respondents reporting high availability in the parallel market increased in December, while availability in the regular market remained broadly stable (Figure 22).

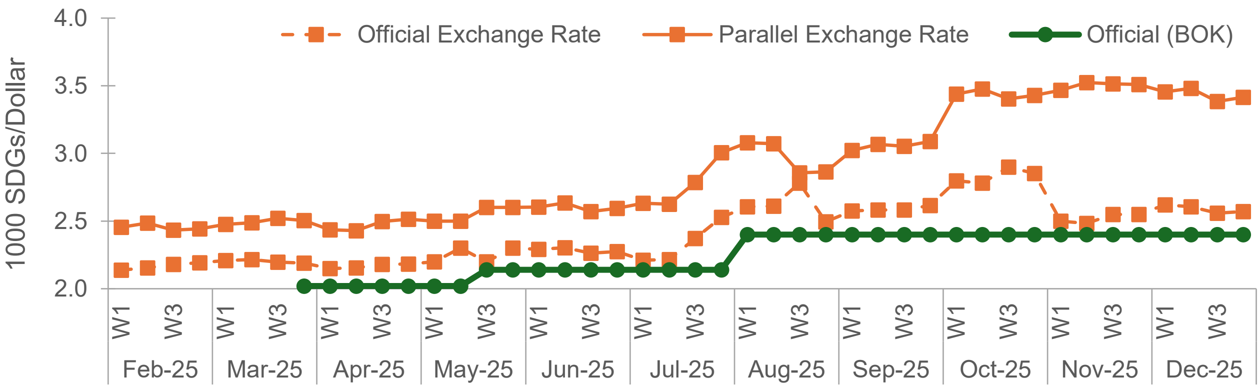
Figure 22: Fuel availability scores, February - December 2025



Exchange Rates

The parallel exchange rate remained elevated but showed only modest fluctuations, while the official exchange rate stayed broadly flat over November and December. The reported official and parallel rates are consistently higher than the rate reported by the Bank of Khartoum (BOK), which has been flat since August (Figure 23).

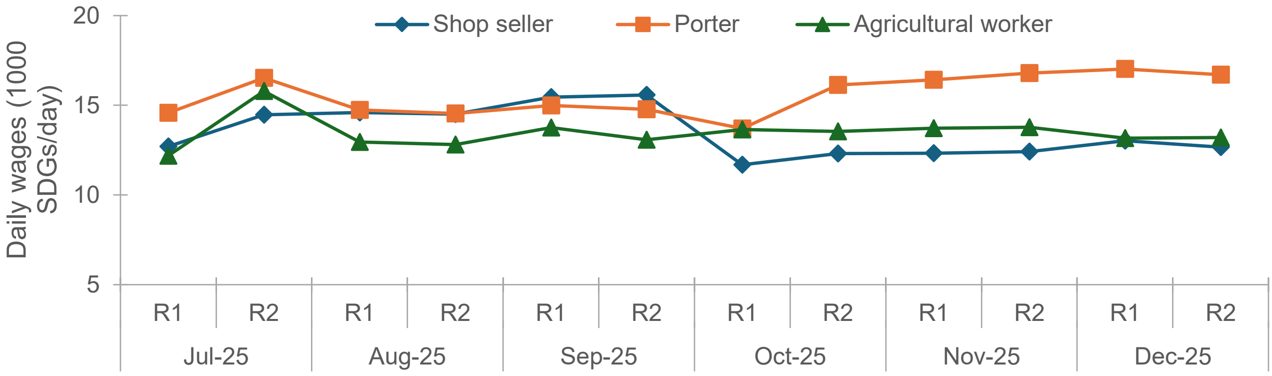
Figure 23: Exchange Rate, SDG/US Dollar, February –December 2025



Labor wages

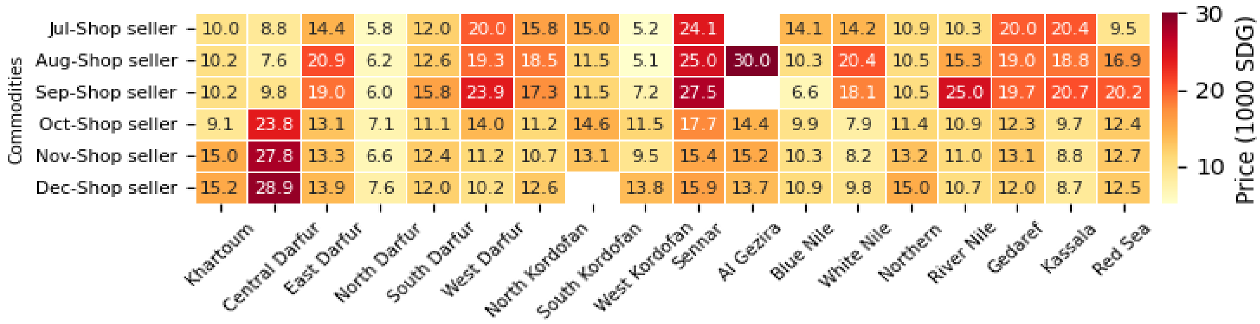
Figure 24 shows that porter wages were the highest in both November and December, followed by agricultural workers and shop sellers, with wages across all three groups remaining largely stable.

Figure 24: Labor daily wages, biweekly average, in SDG/day, July – December 2025



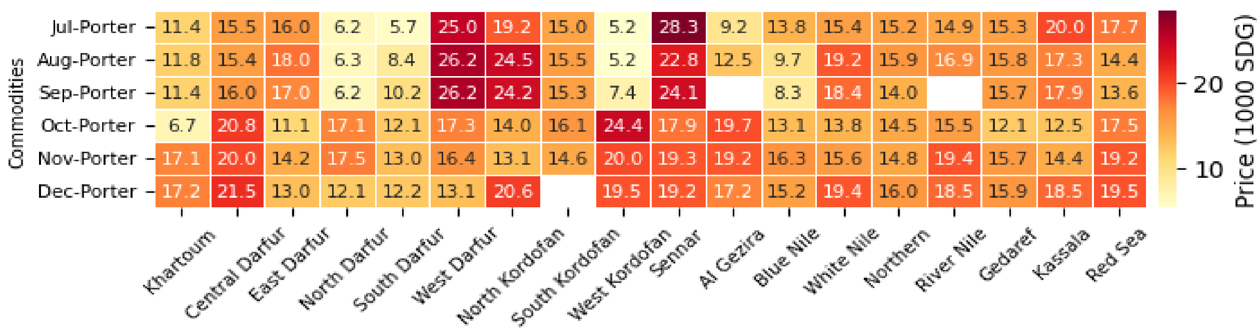
Shop seller wages remained largely stable in November and December. Some states, such as Central Darfur and Sennar, recorded relatively higher wages (Figure 25).

Figure 25: Shop seller daily wage across states 1000 SDG/day, July – December 2025



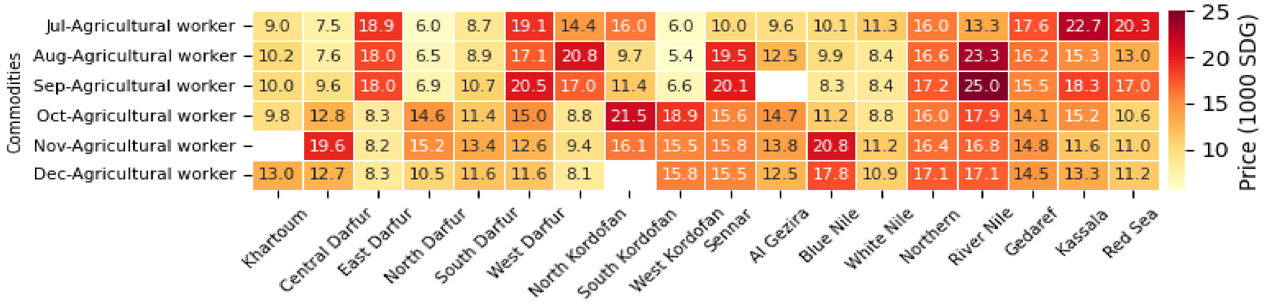
Porter wages remained largely stable between November and December (Figure 26).

Figure 26: Porter daily wage across states 1000 SDG/day, July – December 2025



Agricultural workers' wages remained broadly stable between November and December, with modest changes across most states (Figure 27).

Figure 27: Agricultural worker daily wage across states 1000 SDG/day, July – December 2025



Market Actors' Perceptions

In December 2025, 136 merchants across 15 states were surveyed about market functionality and perceptions on trading activities. Out of the surveyed merchants, 59.6 percent were medium-scale traders, 15.4 percent large-scale traders, and 25 percent small-scale traders.[1]

Challenges Facing Merchants

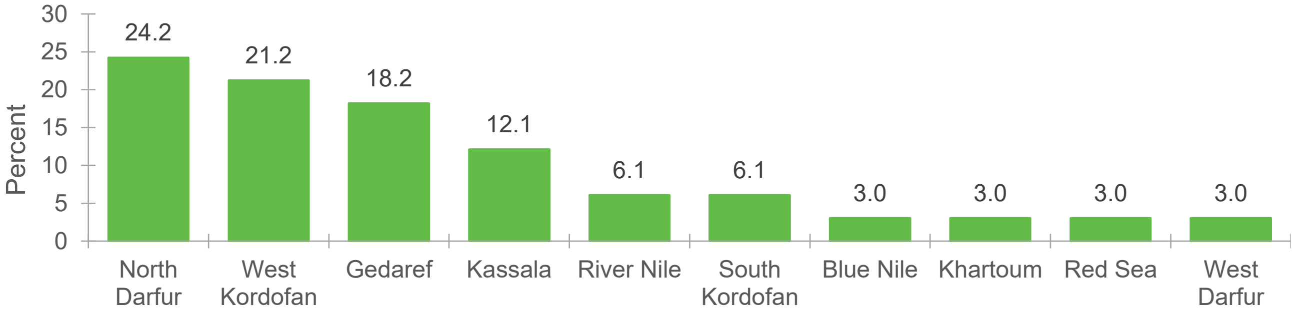
Supply Chain and Logistics

The share of merchants reporting supply chain and logistical challenges remained broadly stable between November and December, at about 24 percent. However, the geographic concentration of these challenges shifted. As shown in Figure 28, supply chain constraints in December were most pronounced in North Darfur, West Kordofan, and Gedaref.

In North Darfur, merchants cited limited transport services and commodity scarcity, driving up transport costs and restricting inflows from other markets. In West Kordofan, the closure of key trade routes from northern Sudan reduced commodity imports and contributed to local shortages and higher prices. In Gedaref, high government fees, taxes, and transport costs were the main drivers of supply chain stress. By contrast, merchants in Northern State, Blue Nile, and South Kordofan most frequently reported no major supply chain challenges.

Overall, merchants continued to face elevated transport costs, disrupted trade routes, and regulatory burdens, with many reporting reduced supply volumes in December, contributing to increased scarcity and upward pressure on prices of essential commodities.

Figure 28: Proportion (percentage) of merchants facing supply chain challenges, by state (N=33)



[1] Traders were asked to self-identify the size of their business using five categories: largest in the market, large, medium, small, and smallest in the market. For reporting purposes, these were consolidated into three groups: large-scale, medium-scale, and small-scale traders.

Demand Conditions

Demand conditions shifted slightly in December, with a higher share of merchants reporting changes compared to November (34.6 percent versus 29.3 percent). Demand fluctuations were most pronounced in Blue Nile, South Kordofan, and North Darfur, while markets in Northern State remained the most stable, followed by North Kordofan and Khartoum.

Merchants attributed demand declines in several states to high prices, the harvest season, and limited cash availability. In Blue Nile, increased own-production during the harvest reduced market demand, while in South Kordofan liquidity constraints constrained purchasing power. By contrast, merchants in North Darfur reported increased market activity and demand despite rising prices.

Financial and Liquidity Constraints

Financial and liquidity pressures intensified in December, with the share of merchants reporting cash constraints rising from 23.3 percent in November to 36.7 percent. These constraints were most pronounced in South Kordofan, Khartoum, and North Darfur, while Northern State, Blue Nile, and North Kordofan remained relatively less affected.

Cash shortages continued to limit imports and bulk purchases in 10 of the 18 states, reducing trade volumes and commodity diversity, with merchants increasingly relying on digital banking applications.

Storage and Power Access

Storage and power access conditions remained favorable in December, with nearly all merchants (97.8 percent) reporting no constraints, similar to November. Only a small number of merchants in Kassala and North Darfur reported challenges. In Kassala, high storage rental costs and poor facility quality constrained safe storage, while in North Darfur insecurity reduced confidence in using available storage. The highest shares of merchants reporting no storage or power constraints were observed in Northern State, South Kordofan, West Kordofan, and Blue Nile.

Safety and Security

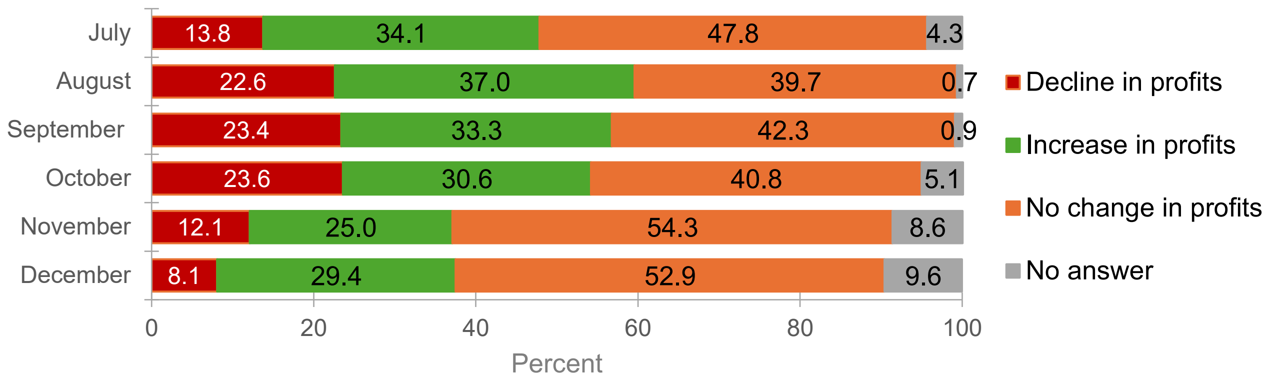
Market safety and security improved further in December, with only 2.9 percent of merchants reporting concerns, down from 3.5 percent in November and 5.1 percent in October. While overall risks remained limited, residual security concerns persisted in North Darfur, where merchants reported exposure to active conflict, violence, and looting in markets.

Profits and Profitability Trends

Profit conditions improved modestly in December. The share of merchants reporting profit increases rose to 29.4 percent from 25 percent in November, while those reporting profit declines fell from 12 percent to about 8 percent (Figure 29). Most reported profit gains were modest (below 50 percent), and just over half of merchants continued to report no change in profits (52.9 percent).

Profit increases were most common in South and West Kordofan and Khartoum, while stable profit margins were widespread across 11 states, particularly Northern State, North Kordofan, and Blue Nile. Although fewer merchants reported declining profits overall, profit losses remained concentrated in North Darfur, followed by Blue Nile, highlighting continued geographic disparities in market performance.

Figure 29: Percentage of merchants reporting changes in profits (July-December 2025)

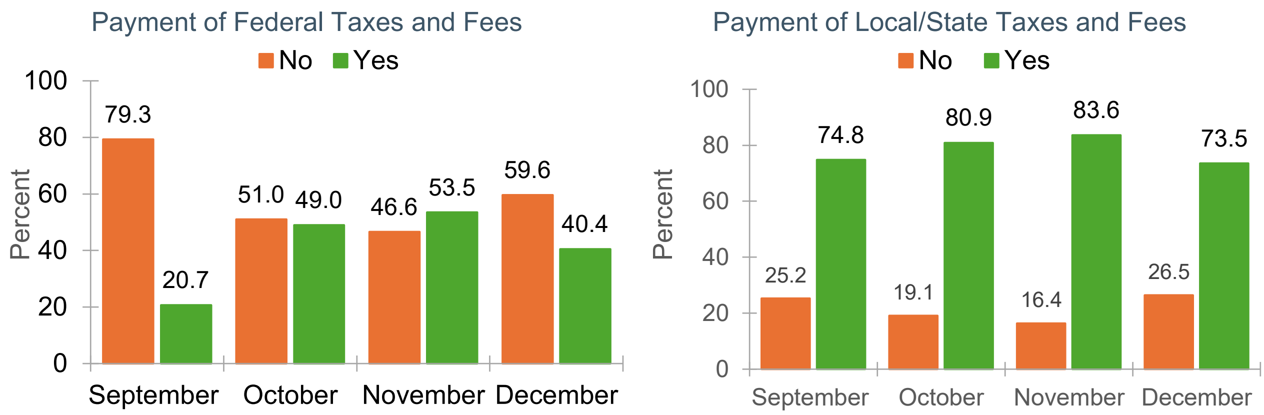


Taxes and Fees

Merchants across most surveyed states continued to report payments of taxes and government fees at both federal and state or locality levels. In December, the share of merchants paying federal taxes declined to 40.4 percent from 59.6 percent in November, mainly reflecting lower payments of VAT, trade licenses, profit taxes, and customs duties. Federal tax payments were most frequently reported in Northern State, North Kordofan, and Blue Nile.

Payments at state and locality levels remained substantially higher, although they also declined in December, from 83.6 percent in November to 73.5 percent. These fees were largely related to market management, sanitation, licensing, health services, and Zakat, with reports of irregular fees in parts of Darfur and Kordofan linked to market security. The highest shares of merchants reporting local-level payments were observed in Northern State, Blue Nile, and North Kordofan (Figure 30).

Figure 30: Percentage of merchants reporting payments of taxes and government fees (July-October 2025)



Perceptions of the usefulness of federal taxes declined, with 71 percent of paying merchants viewing them as beneficial for trading activities, down from 93.6 percent in November. While concerns remain that high taxation reduces profit margins and raises prices, many merchants acknowledged that federal taxes facilitate cross-state trade, ease bulk transactions, and support government revenue generation.

Perceptions of state and locality fees followed a similar pattern. Although still largely viewed as beneficial for market functioning, the share of merchants considering these fees useful declined to 78 percent in December from 85.6 percent in November.

Traders' Future Outlook

Merchants' expectations remained broadly stable in December. About 62.5 percent planned to continue trading at current levels, similar to November. However, the share intending to expand trading volumes declined to 20.6 percent from 26.7 percent, with planned expansions mainly concentrated in Blue Nile and South Kordofan.

Only small shares of merchants planned to reduce trade volumes (4.4 percent, mainly in Gedaref and North Kordofan) or relocate to other markets (around 4 percent, notably in South Kordofan and Kassala). Temporary exits from trading or changes in product mix were negligible, while uncertainty about future plans increased to 6.6 percent, up from 3.5 percent in November.

ABOUT THE AUTHORS

Shima Mohamed is a Research Analyst in IFPRI's DSG Unit, based in in Cairo, Egypt. **Halefom Yigzaw Nigus** is a Research Collaborator in the DSG Unit of IFPRI, based in Addis Ababa, Ethiopia. **Tarig Rakhy** is a Research Analyst in IFPRI's DSG Unit, based in Doha, Qatar. **Hala Abushama** is a Research Analyst in IFPRI's DSG Unit, based in Cairo, Egypt. **Khalid Siddig** is Senior Research Fellow in IFPRI's DSG Unit and the Leader of IFPRI's Sudan Strategy Support Program, based in Nairobi, Kenya and an Associate Professor at Khartoum University, Sudan.

ACKNOWLEDGMENTS

This research was supported by the Netherlands Embassy for Sudan and the Food and Agriculture Organization of the United Nations (FAO). This partnership enables the sustained production and use of timely, reliable, and publicly available market data in one of the world's most challenging contexts.

Ministry of Foreign Affairs

Food and Agriculture Organization of the United Nations

The Sudan Strategy Support Program (SSSP) is managed by the International Food Policy Research Institute (IFPRI). This publication has been prepared as an output of the SSSP and has not been independently peer reviewed. Any opinions expressed here belong to the author(s) and are not necessarily representative of or endorsed by IFPRI.

INTERNATIONAL FOOD POLICY RESEARCH INSTITUTE

A world free of hunger and malnutrition

IFPRI is a CGIAR Research Center

IFPRI Sudan, Arab Organization for Agricultural Development (AOAD), 7th Amarat Street | P.O. Box 474 – 11111 | Khartoum, Sudan

Email: ifpri-sudan@cgiar.org | https://sudan.ifpri.info/