

Essential Commodities Prices, Availability, and Market Actors' Perceptions

June 2025

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Summary

This report analyzes key market trends in Sudan from February to June 2025, focusing on the prices, availability, and quality of essential commodities—cereals, vegetables, animal products, agricultural inputs, fuel, and exchange rates. Consistent with previous editions, it reveals significant spatial and temporal disparities across Sudan's 18 states.

Cereals showed mixed trends. Wheat prices stabilized in June after a mid-May spike, while sorghum and millet fluctuated modestly. Wheat flour prices continued rising. Perceived availability and quality, particularly of wheat and wheat flour, deteriorated in June, with highest prices in conflict-affected and remote areas. Vegetables—particularly tomatoes and potatoes—experienced sharp price hikes in June, largely due to seasonal pressures and logistical disruptions. Onion prices were more stable but showed regional variation.

Animal products faced upward price pressure and volatility. Prices of lamb, beef, and eggs rose steadily; chicken and fish were erratic, and milk prices fluctuated. Availability declined, especially for beef and eggs. Perceived quality improved for meat but dropped for chicken and fish. Other staples, including sugar, cooking oil, fava beans, and oilseeds, had relatively stable trends overall, but prices

varied widely by state. Sugar and fava beans rose sharply, particularly in South Kordofan and Kas-sala.

Agricultural inputs showed moderate price fluctuations. Improved seed varieties remained costlier than local ones, with peaks for wheat and potato seeds. Fuel prices in parallel markets spiked in April–May before easing in June. South Kordofan and Central Darfur recorded the highest prices. Exchange rates continued to diverge between official and parallel markets, with wide regional disparities—Khartoum, Gedaref, and North Kordofan reported the highest parallel rates.

Cereals and Flour

As depicted in Figure 1, wheat prices remained relatively stable throughout June, following the sharp spike observed in mid-May. This stabilization can be attributed to medium to high levels of availability in local markets and an overall easing of supply constraints, as illustrated in Figure 3. Sorghum prices, which had been consistently low and stable over the preceding months, began to rise gradually during June. This upward trend likely reflects growing supply-side challenges, including logistical disruptions and limited market access in certain areas.

Millet prices, which had surged in mid-May, initially declined but began to rebound toward the end of June. This pattern suggests continued volatility in supply and intermittent availability, with fluctuations likely driven by localized disruptions. In contrast, wheat flour prices, which had decreased in May, exhibited a steady increase throughout June. This trend points to a gradual tightening in the availability of wheat flour, a finding further supported by the availability data presented in Figure 3.

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

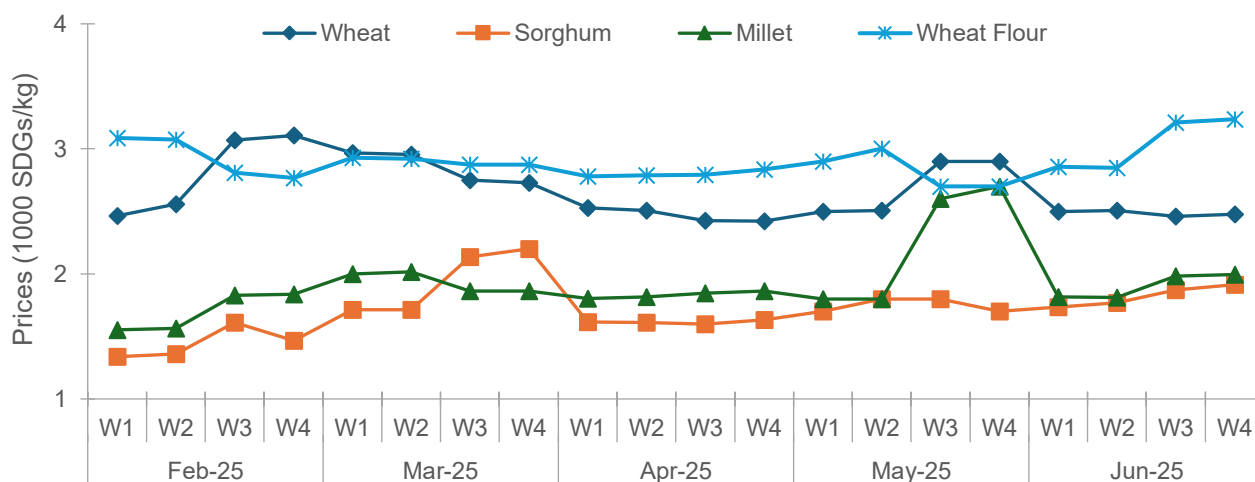


Figure 2 highlights regional variation in cereal prices in June across Sudan’s market. Wheat prices vary most significantly, with the highest recorded in West and South Darfur, and the lowest prices in Northern and White Nile, indicating significant disparities in availability, supply, and logistical constraints across states. Sorghum prices were relatively uniform across states, maintaining relatively low levels with only slight changes in Darfur and Kordofan states, indicating more consistent supply chains and availability. Millet prices also vary slightly and modestly in June, with the highest level recorded in Blue Nile, Khartoum, and River Nile, and reaching their lowest in Northern, Darfur, North, and West Kordofan states. Wheat flour showed the most striking spatial disparity, with exceptionally high prices in South Kordofan and Central Darfur states, indicating severe supply disruptions.

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

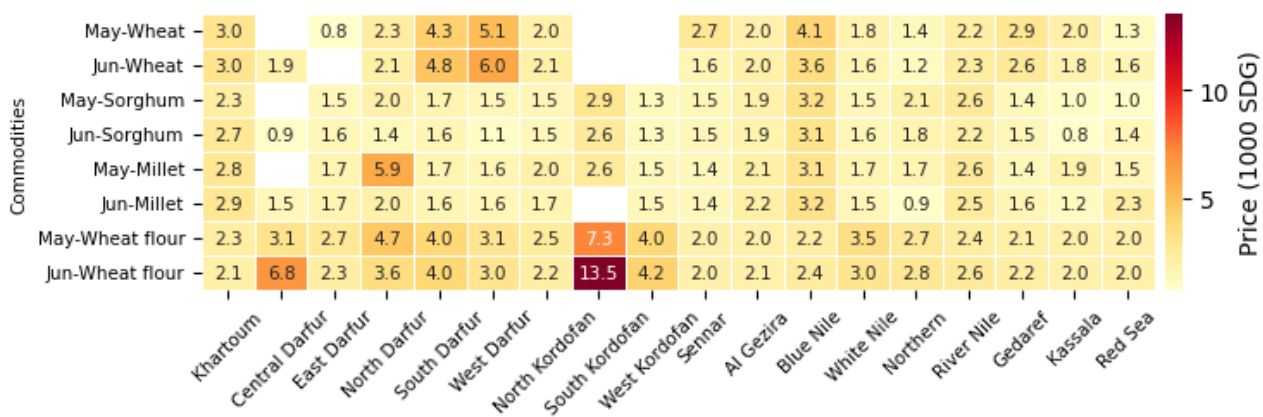


Figure 3 illustrates reported availability trends for cereals and wheat from February to June 2025. The data indicates a notable decline in the proportion of traders reporting high availability in June, particularly for wheat. The share of traders indicating high availability of wheat dropped significantly, from 38 percent in February to just 24 percent in June. Sorghum’s availability remained relatively stable, with 57 percent of traders still reporting high availability, though the share has declined from 71 percent in February. For millet, the share of traders reporting high availability remained the same in June, continuing a downward trend from earlier months. Wheat flour availability also decreased slightly in June. These trends suggest persistent and, in some cases, worsening access issues, supply constraints, and increasing pressures on cereal markets.

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

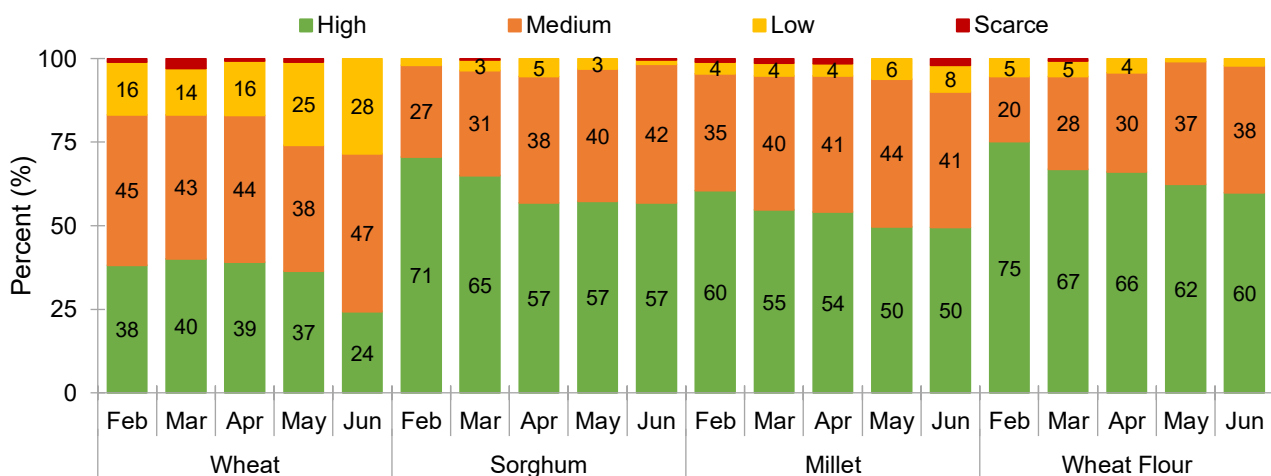
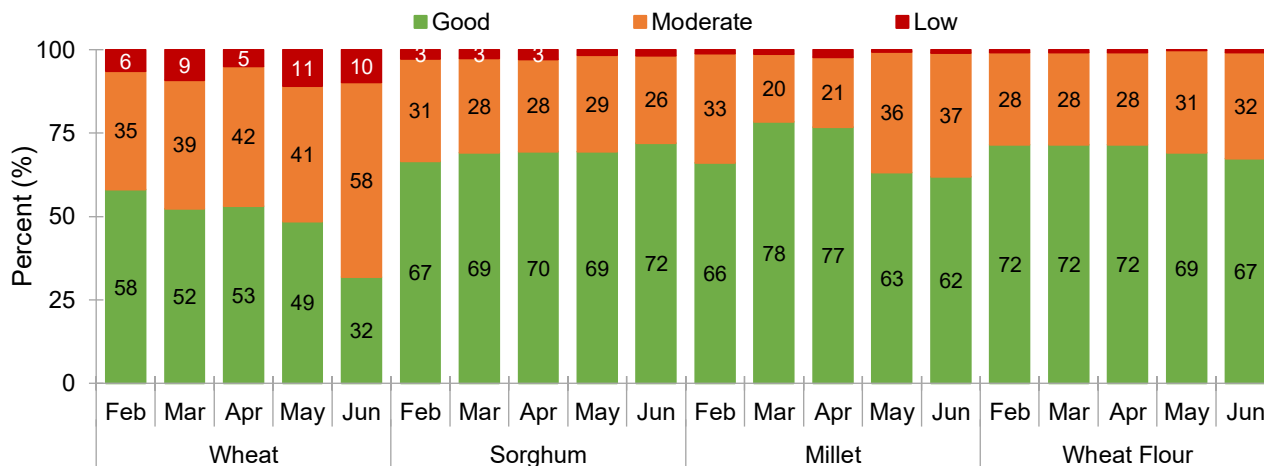


Figure 4 presents traders’ perceptions of cereal and wheat flour quality up to June. Wheat quality continued to decline significantly; only 32 percent of traders reported it as good in June, compared to 49 percent in May. For the sorghum, millet, and wheat flour most of traders rated their quality as good or moderate – slight changes over time are observed – with only minor reports of low quality.

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



Vegetables

Figure 5 shows that tomato prices remained relatively stable from February through April, but rose sharply in June, following a gradual increase in May. This trend reflects declining availability, as the share of merchants reporting high availability dropped significantly—from 80 percent in February to just 28 percent in June (Figure 7). The gradual price increase and reduced availability suggest growing supply constraints, likely driven by seasonal factors or logistical disruptions.

Potato prices, consistently higher than other vegetables, peaked in late February and rose again in May and June after a period of relative stability during March and April. This pattern also points to declining availability or transportation bottlenecks, as indicated in Figure 7.

Onion prices followed a more fluctuating path—declining steadily from February to early April, then rebounding modestly through May and June. While certain vegetables such as tomatoes and potatoes saw sharp hikes, overall price patterns showed fewer abrupt fluctuations than those seen in the meat or fuel markets. However, seasonal pressures and possible supply shortages—particularly in conflict-affected areas—continue to shape market dynamics.

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

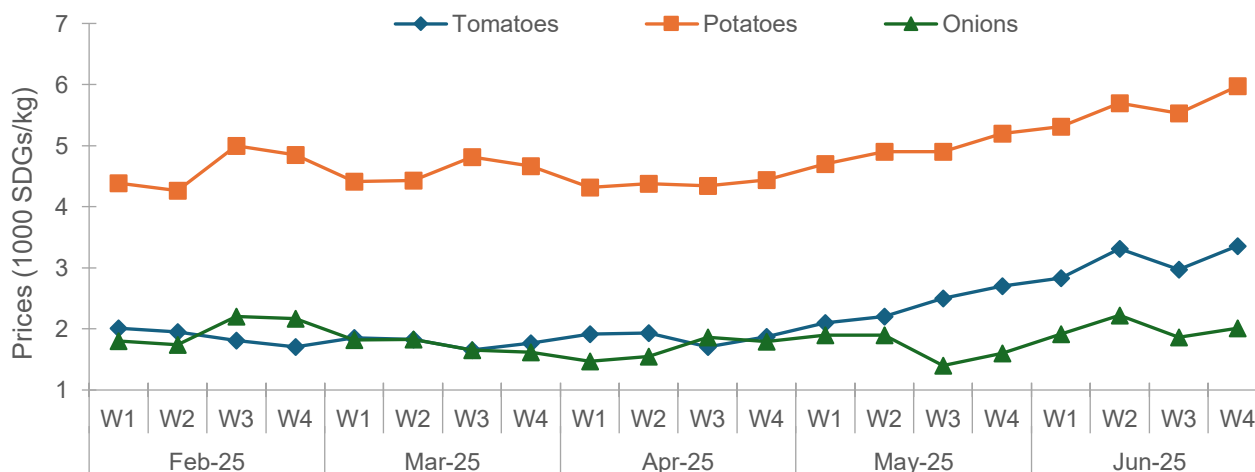


Figure 6 reveals marked regional and temporal disparities in vegetable prices across Sudan in June. Tomato prices rose in most states compared to May, with the highest levels recorded in West Kordofan, Sennar, large parts of Darfur, Kassala, and Gedaref. Potato prices also showed pronounced regional variation, peaking in Sennar, West Kordofan, and North Kordofan. While onion prices were

relatively more stable, significant variation persists—prices in Northern State were up to seven times higher than those in East Darfur, which recorded the lowest level. These trends reflect deep imbalances in supply chains and market access across the country.

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

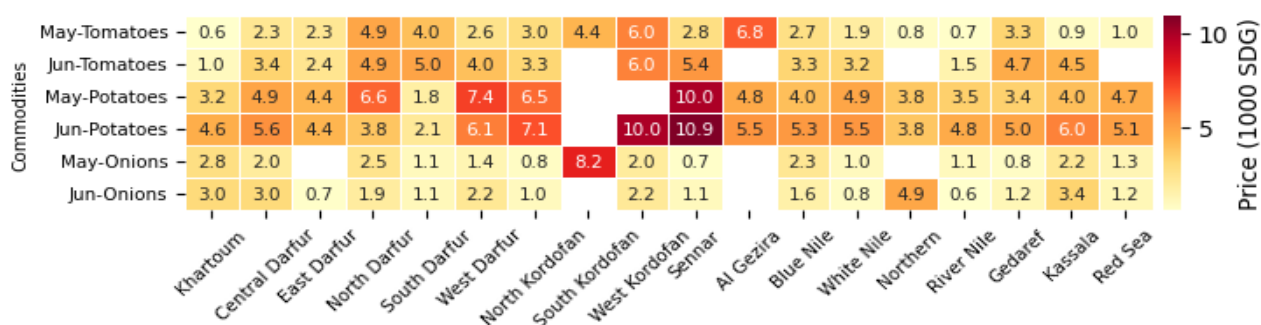


Figure 7 highlights a clear trend of deterioration in the availability of vegetables in June, particularly tomatoes and potatoes. The share of traders reporting high availability of tomatoes dropped sharply, from 80 percent in February to just 28 percent in June. Meanwhile, those reporting low availability rose from 5 percent to 24 percent over the same period. In contrast, onion availability remained relatively stable throughout February to May but decreased from 71 percent in May to 60 percent in June; however, it was still significantly higher than other vegetables.

Figure 7: Vegetable availability scores, February - June 2025

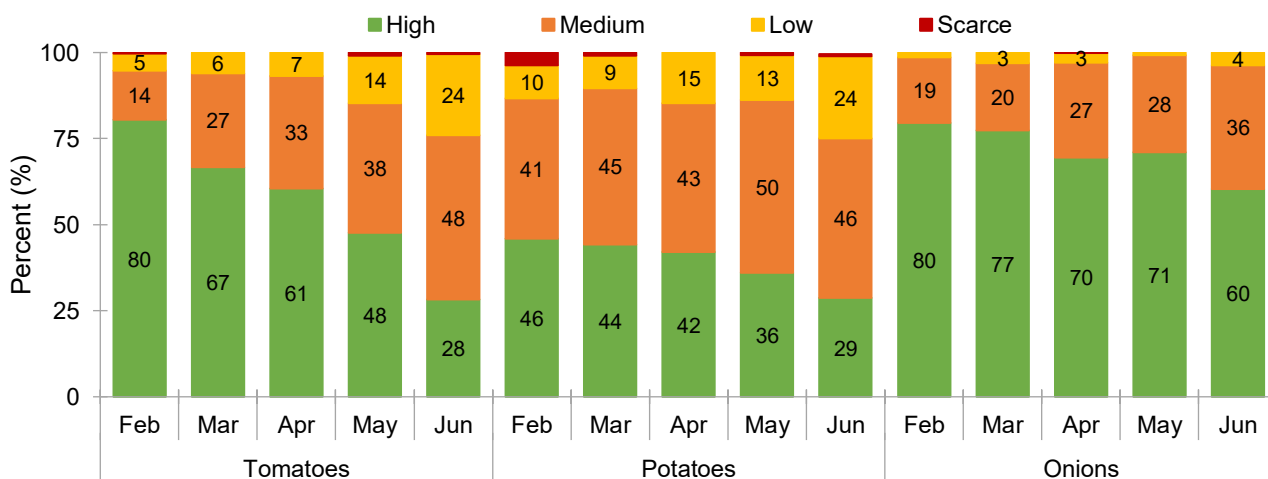
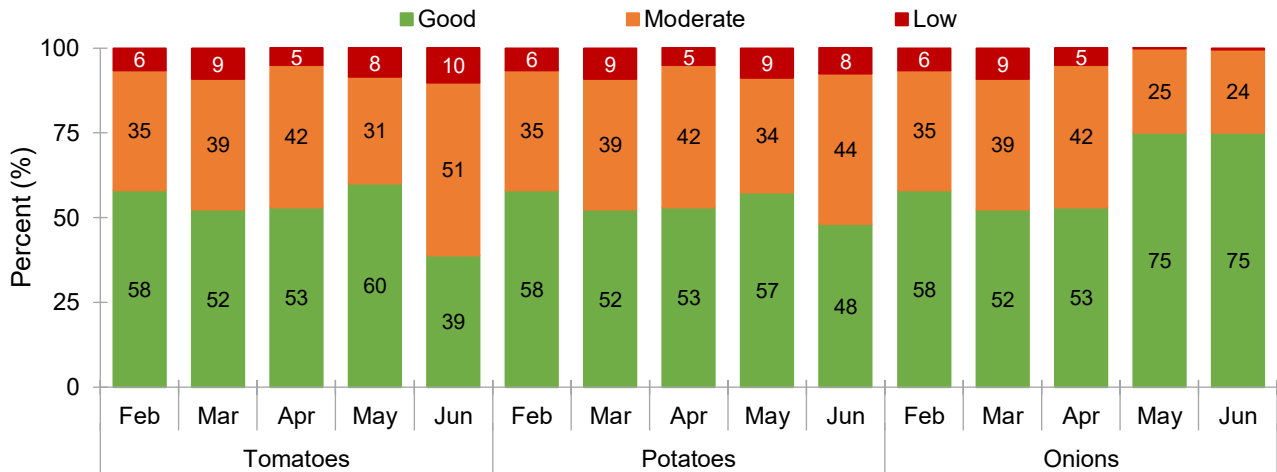


Figure 8 illustrates traders' perceptions of vegetable quality from February to June 2025, showing overall stability for onions and tomatoes, and a modest improvement for potatoes over time. Tomato quality remained relatively stable until May but experienced a sharp decline in June: only 39 percent of traders rated tomatoes as good quality, while 51 percent reported moderate and 10 percent low quality—the highest share of poor ratings observed over the period. Potato quality showed gradual improvement between February and May, peaking with 57 percent of traders rating it as good in May, before dropping to 48 percent in June. Onion quality remained consistently high throughout, with 75 percent of traders reporting good quality in both May and June, and almost no traders rating it as low in June. These trends suggest emerging concerns about the freshness and handling of tomatoes and potatoes, while onions remained reliably high in quality.

Figure 8: Vegetable quality scores, February - June 2025



Meat and Animal Products

Figure 9 shows that during the February to June 2025 period, prices of key meat and animal products exhibited notable volatility and upward pressure. Lamb meat prices rose steadily through the early months before stabilizing. Beef followed a similar trajectory, reflecting sustained inflationary pressure. Chicken prices were more erratic, initially declining before recovering and peaking mid-period, then stabilizing. Fish prices fluctuated throughout, with alternating dips and peaks across the months. Milk prices were highly unstable, marked by sharp drops and rebounds, suggesting ongoing challenges in dairy supply and distribution. Egg prices showed the least volatility, with a gradual increase before reaching a stable level.

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

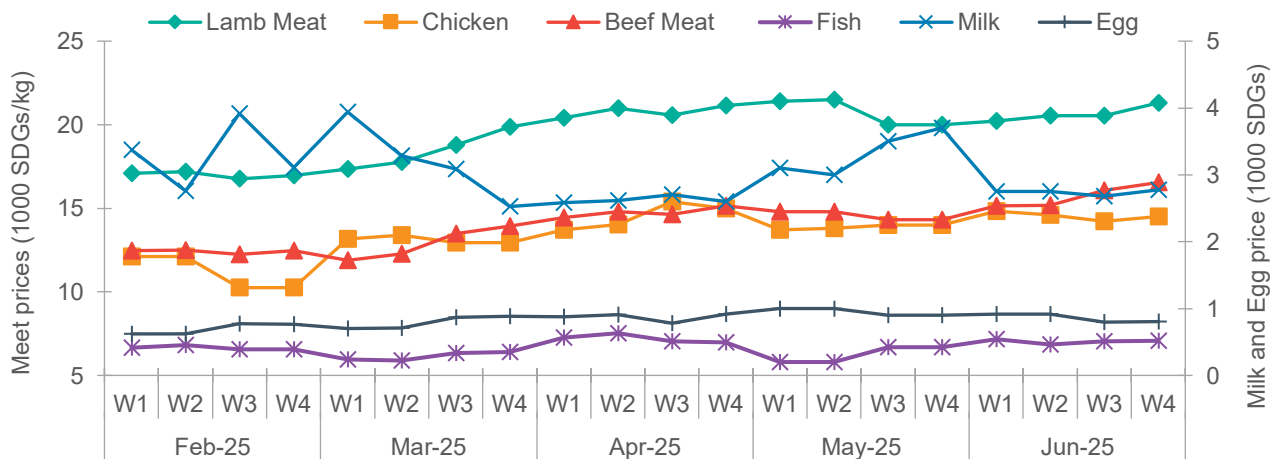


Figure 10 highlights the mixed regional trends and disparities in meat prices across Sudanese states during May–June 2025. Lamb prices remained relatively stable overall, though some states, such as West Kordofan, experienced a sharp drop of over 10,000 SDG, while others, such as South Kordofan and Gedaref saw moderate increases. The highest lamb price in June was recorded in the River Nile, nearly three times higher than the lowest price in North Darfur.

Chicken prices declined slightly on average, with notable drops in North Darfur, Al Gezira, and the River Nile. However, some states, such as Gedaref and North Kordofan, saw increases. The highest

chicken price in June was observed in Sennar (18,600 SDG), while the lowest was in Central Darfur (3,900 SDG), indicating significant regional disparities. Beef prices, in contrast, rose significantly in most states, with the largest increases seen in Al Gezira, Kassala, and Gedaref. The highest beef price in June was recorded in Al Gezira, more than double the lowest price in East and North Darfur.

Fish prices showed the most variability: Khartoum recorded the highest price in June (17,800 SDG), while North Darfur had the lowest (3,500 SDG). Milk prices remained generally stable, though some states—such as Northern, West Darfur, and North Darfur—reported slight decreases. Egg prices also remained stable overall, with minor declines observed in North Darfur, West Darfur, and Gedaref.

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

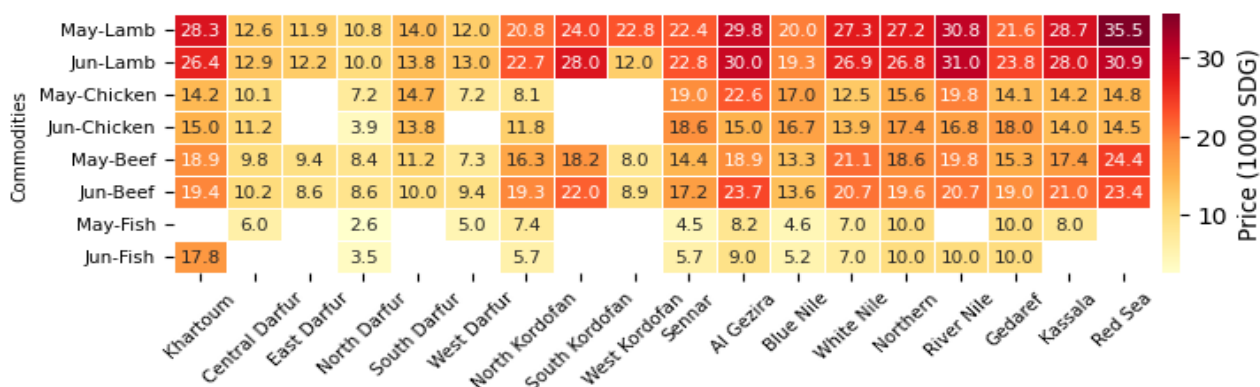


Figure 11 shows varying trends of availability reporting by traders of meat and animal products during the February to June 2025 period. Lamb, chicken, beef, milk, and eggs all experienced a noticeable decline in high availability reported by traders, with the most significant drops observed in beef and egg, which started the period with widespread availability but saw reduced availability by June. Chicken availability declined steadily, with fewer traders reporting high availability and a slight reduction in scarcity. Milk availability also dropped, and a small increase in scarcity was observed toward June. Fish availability remained relatively stable, with a slight improvement in scarcity levels over time.

Figure 5: Meat and animal products availability scores, February - June 2025

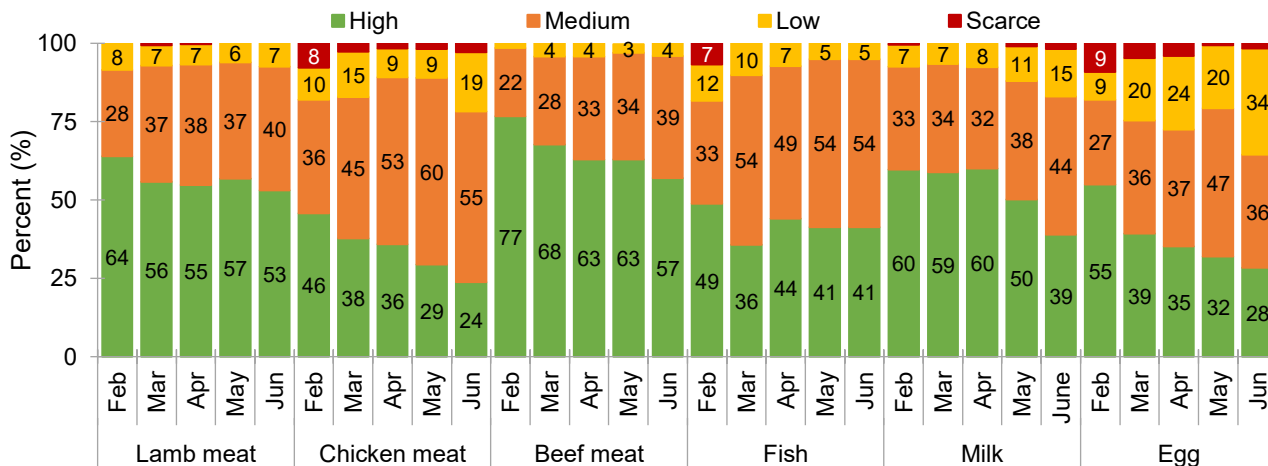
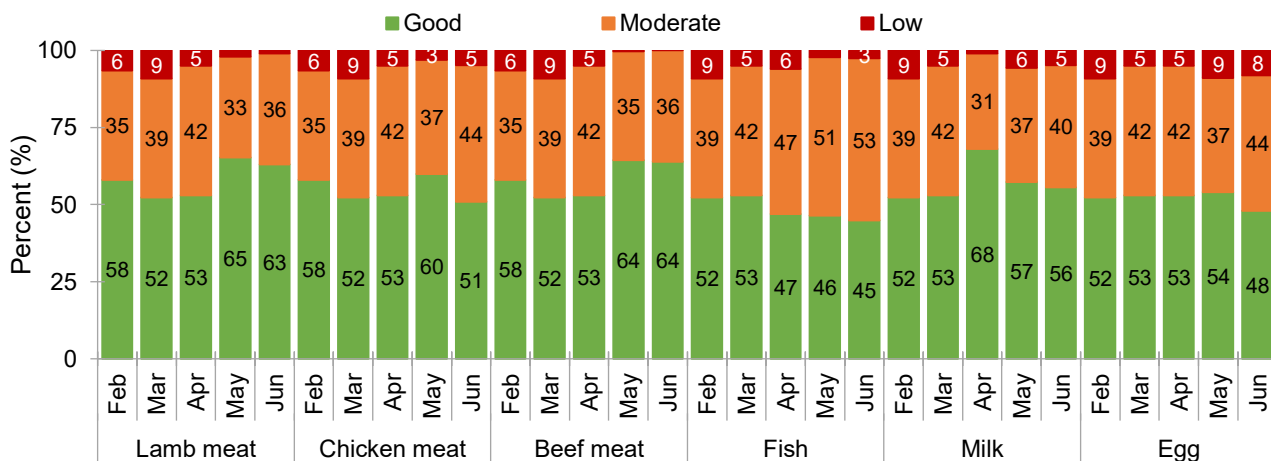


Figure 12 shows that during the February to June 2025 period, the perceived quality of meat and animal products in Sudan exhibited varying trends. Lamb, beef, and milk quality generally improved over time, with more traders reporting good-quality products by May and June. In contrast, chicken,

fish, and eggs experienced a gradual decline in quality, with fewer traders reports of good quality by June. Across all commodities, there were occasional spikes in traders' reports of low-quality products. For lamb, chicken, and beef, these spikes were most notable during March and April. For fish and milk, the highest readers' reports of low quality occurred in February. In the case of eggs, low-quality reports by traders were more frequent in February, May, and June.

Figure 6: Meat and animal products quality scores, February - June 2025



Oilseeds, Cooking Oils, Sugar, and Fava Beans

Figure 13 shows that between February and June 2025, prices of key staple commodities in Sudan exhibited diverse trends. Sugar prices increased overall, with a sharp rise in early June followed by a brief dip. Cooking oil also saw a general upward trend, marked by steady increases through April and May before stabilizing. Fava bean prices declined slightly overall, though they peaked briefly in mid-May. Sesame prices decreased overall, with a noticeable dip in March followed by a gradual recovery. Groundnut prices rose, with a notable jump in mid-May. Sunflower prices also increased overall, despite a sharp drop in late February, which was followed by a recovery in March.

Figure 7: Local prices (1000 SDGs) of oilseed (Kg), cooking oils (Liter), sugar (Kg), and fava beans (Kg), February - June 2025

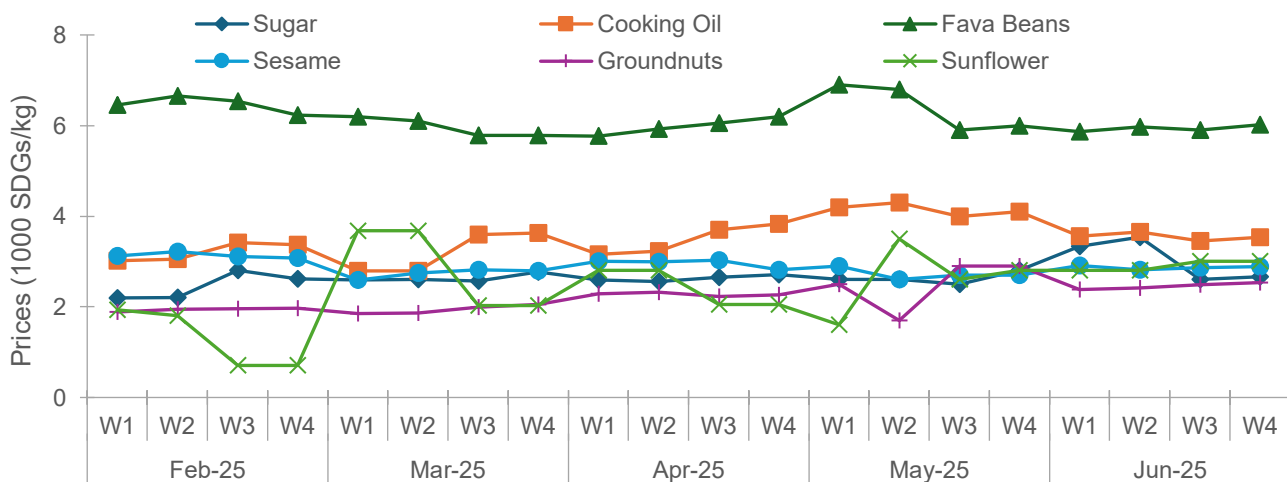


Figure 14 illustrates significant state-level variation in the prices of six staple commodities across Sudan in June 2025.

- ▶ Sugar prices ranged widely—from the lowest in West Kordofan to the highest in South Kordofan, where prices were over 13 times higher. The steepest monthly increase occurred in South Kordofan, while North Darfur saw the largest drop.
- ▶ Cooking oil was most expensive in Kassala and cheapest in South Darfur, with a sevenfold price gap. Blue Nile recorded the sharpest rise, and North Darfur the largest fall.
- ▶ Sesame peaked in West Kordofan and was lowest in North Darfur. Northern state saw the most notable increase, while prices declined most in East Darfur.
- ▶ Groundnut prices were highest in Al Gezira and lowest in Central Darfur. North Darfur experienced the sharpest rise, while Al Gezira saw the biggest drop.
- ▶ Sunflower oil was only available in select states. North Kordofan had the highest and most stable prices, while Blue Nile recorded the lowest.

Fava beans were costliest in South Kordofan and cheapest in Khartoum, with prices varying more than fourfold. South Kordofan also had the largest month-on-month increase, while Northern state saw the steepest decline.

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

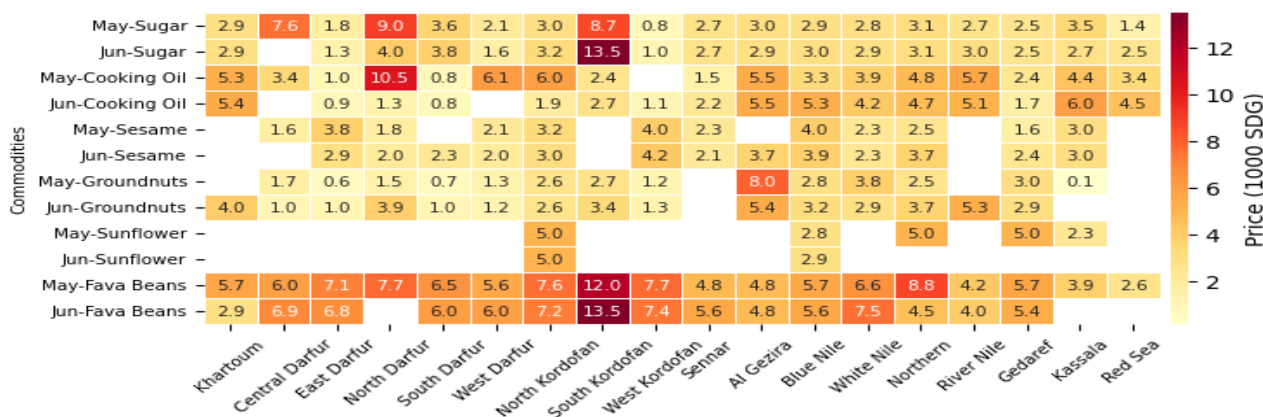


Figure 15 shows that the availability of oilseeds, cooking oils, sugar, and fava beans in Sudan displayed a range of trends. Sesame and groundnuts both showed improved availability alongside a reduction in scarcity. Sunflower, however, experienced a decline in availability, though scarcity levels also eased slightly. Cooking oil availability declined over the period, but scarcity remained stable. Fava beans saw a modest decline in high availability, yet scarcity decreased. Sugar experienced a drop in availability accompanied by a rise in scarcity.

Figure 8: Oilseeds, cooking oils, sugar, and fava beans availability scores, February - June 2025

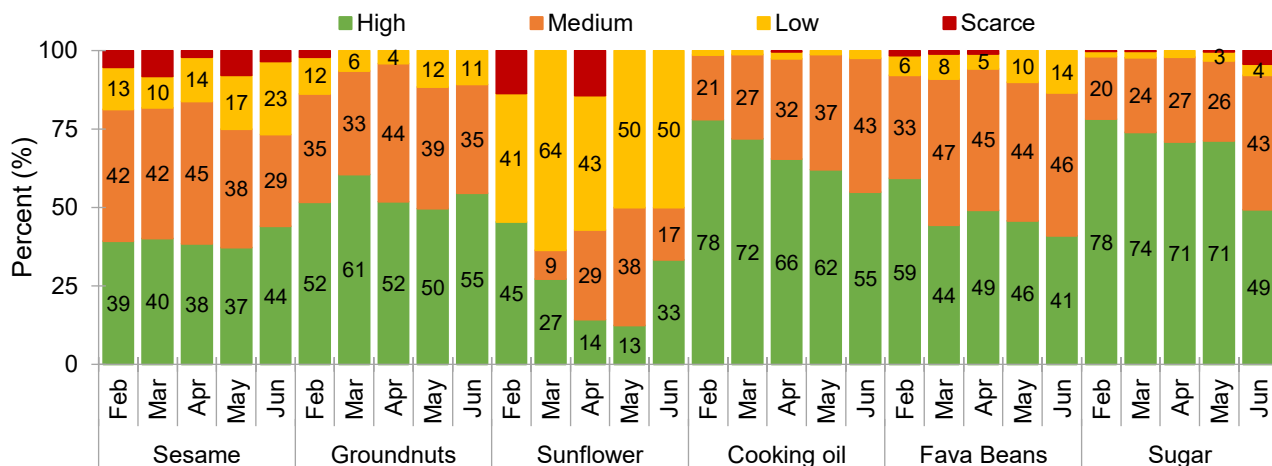
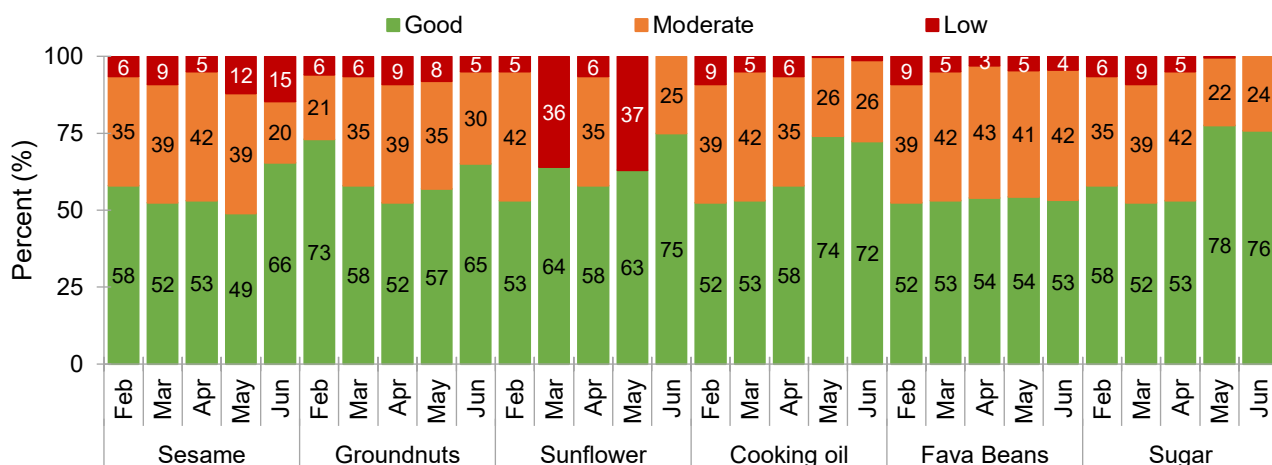


Figure 16 shows that from February to June, sesame, groundnuts, sunflower, cooking oil, fava beans, and sugar consistently exhibited a dominant trend of good perceived quality. Moderate ratings fluctuated throughout the period, particularly for sunflower and cooking oil. Low ratings remained minimal overall, except for sunflower, which recorded the highest low-quality scores in March and June, and sesame, which saw a peak in low-quality ratings in June. Sugar and fava beans demonstrated the most stable quality perception, with little variation across all categories.

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



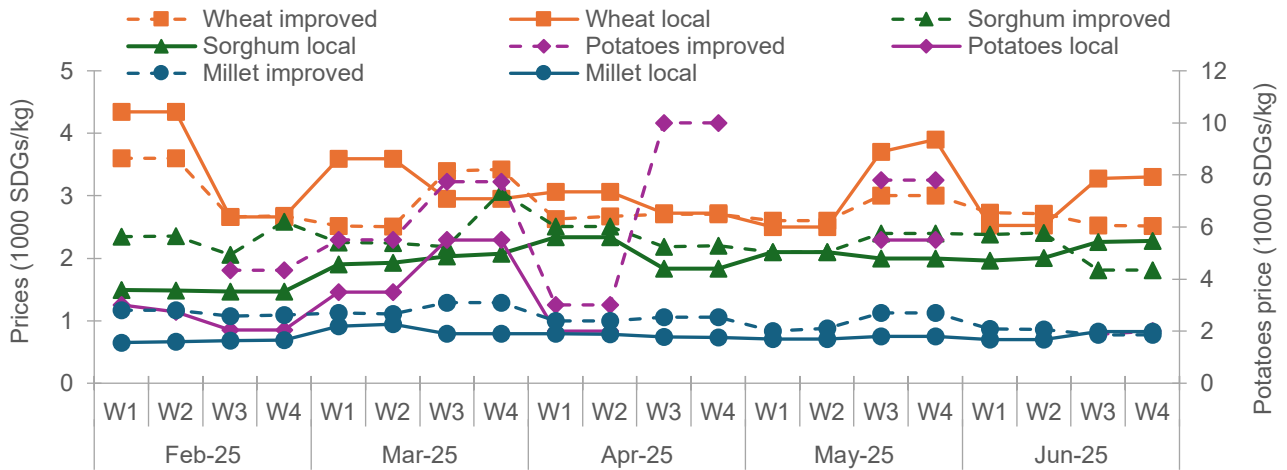
Improved and Local Seeds

Figure 17 shows weekly price trends of local and improved seed varieties of wheat, sorghum, millet, and potatoes from February to June 2025.

- ▶ Millet prices remained the most stable throughout the period, with improved seeds consistently priced slightly above local ones.
- ▶ Sorghum also exhibited relatively steady prices, though improved seeds peaked briefly in March before returning to earlier levels.
- ▶ Wheat prices were more volatile. Local seeds were generally priced higher than improved ones—particularly in early February and May—likely due to their dual use for planting and household consumption, unlike treated improved seeds.

- Prices of improved potato seeds spiked sharply at the end of April, while local potato seeds showed more moderate fluctuations.

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



Diesel and Petrol

Figure 20 shows that parallel market diesel prices rose sharply between April and May, while regular diesel prices remained mostly stable. A similar pattern was observed for parallel petrol, which increased from late April to mid-May before declining. Throughout the period from February to June 2025, prices in the parallel market consistently exceeded those in the regular market for both fuel types.

Figure 20: Local fuel prices, SDGs/Liter, monthly average, February - June 2025

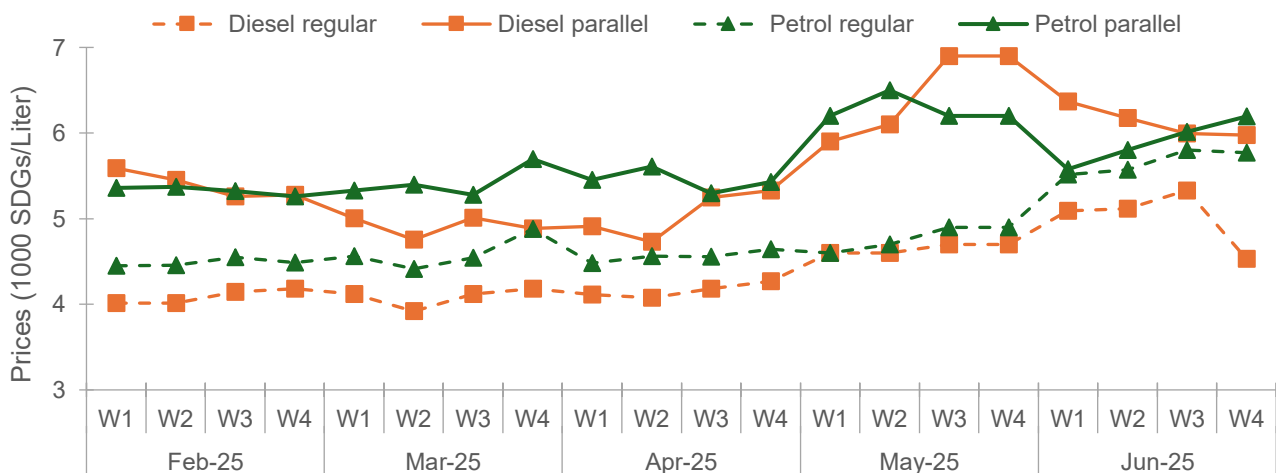


Figure 21 reveals pronounced spatial disparities in fuel prices across Sudanese states. In June, South Kordofan recorded the highest regular diesel price (24.8 SDG/L), while Khartoum and River Nile had the lowest. Parallel market diesel prices also varied significantly across states, with relatively higher prices reported in East and Central Darfur states and Gedaref again among the least expensive.

Petrol prices followed broadly similar trends. In June, South Darfur had the highest parallel petrol price (8.6 SDG/L), followed by Central Darfur, while Gedaref posted the lowest price across both market types.

These patterns highlight persistent geographic inequalities in fuel pricing and market functioning, with conflict-affected and remote states facing the highest costs, while prices remain relatively low in more accessible eastern regions.

Figure 21: Fuel prices across states, 1000 SDGs/Liter, May - June 2025

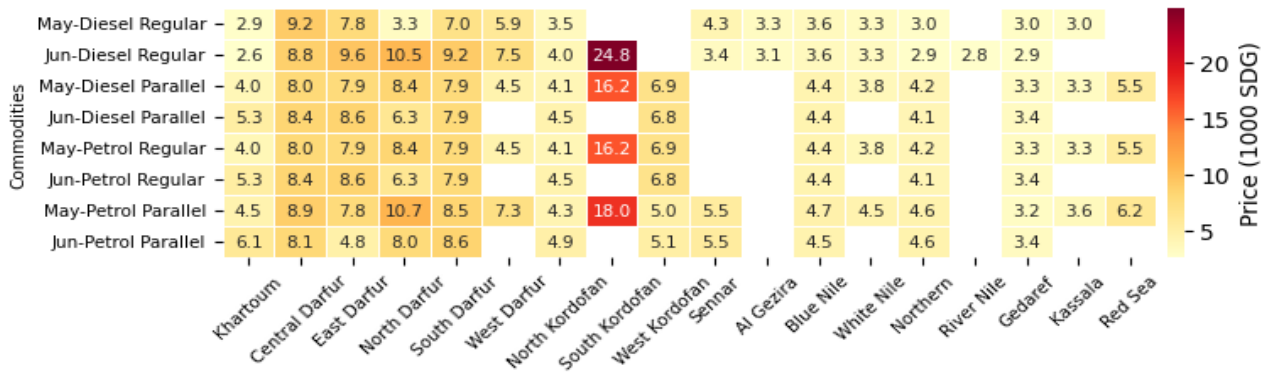
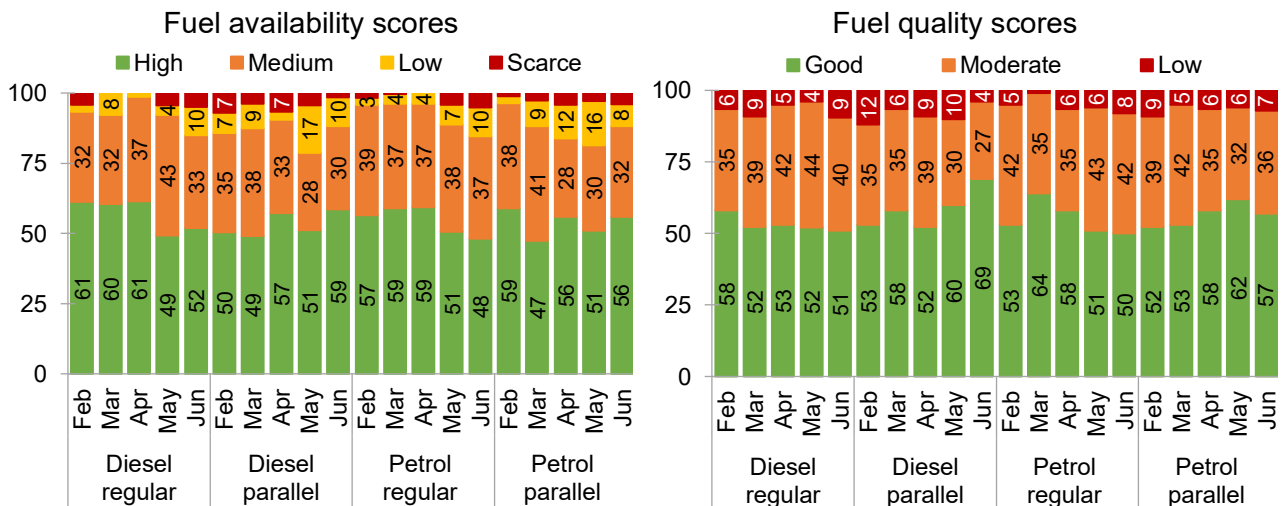


Figure 22 shows that fuel availability in the regular market remained largely stable, with most traders reporting high or medium availability. However, in May, there was a slight decline in availability, especially for diesel. In contrast, availability in the parallel market fluctuated more over time, with increased reports of low and scarce availability in May, particularly for petrol.

Regarding fuel quality, the proportion of traders reporting high-quality fuel in the regular market declined steadily over the period. Meanwhile, in the parallel market, perceptions of quality were more mixed, but June saw a slight increase in the share of traders reporting good quality, particularly for diesel. These trends suggest that while the regular market offers relatively consistent access, both availability and quality remain more volatile in the parallel market.

Figure 22: Fuel availability and quality scores, February - June 2025



Exchange Rates

Figure 23 shows a persistent and widening gap between the official and parallel market exchange rates. Both rates rose gradually during the February to June period, but the parallel rate increased more sharply, especially in late May. The official rate remained more stable, with only a modest mid-May spike.

Figure 23: Exchange Rate, SDG/US Dollar, February - June 2025

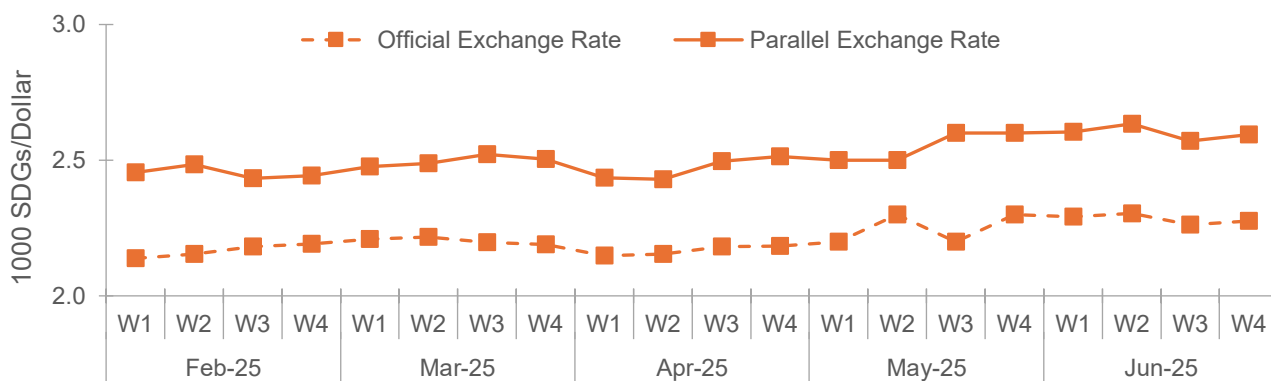
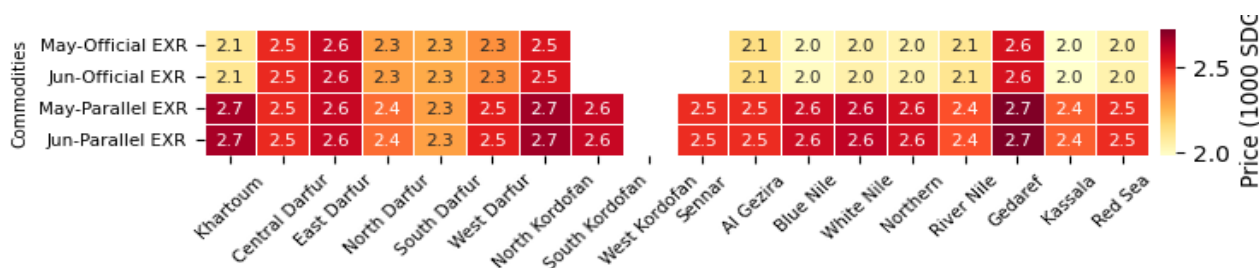


Figure 24 highlights significant spatial variation in exchange rates during May and June 2025. Across all states, parallel rates were consistently higher than official rates, underscoring heavy reliance on informal exchange channels due to foreign currency shortages. The highest parallel rates were recorded in Khartoum, Gedaref, and North Kordofan, while lower rates appeared in South Darfur, Kassala and North Darfur. Several states saw rising parallel rates from May to June, signaling increasing pressure on unofficial markets.

Figure 24: Units of 1000 SDGs to one US dollar exchange rates across states, May - June 2025



Market Actors' Perception

Market actors in 12 of Sudan's 18 states report continued concerns over market functionality, namely, access to goods and commodities, increased prices of essential goods, and declining purchasing power as a result of reduced income levels of Sudanese households. Although the situation continues to press on merchants' profitability and smooth market operations, regional challenges and opportunities vary; however, some common challenges persist. Some of the common challenges across Sudan include:

- ▶ Notable declines in demand and purchasing power even for essential commodities (except in the Red Sea State).
- ▶ Continued increase in prices of essential commodities.
- ▶ Difficulty and delays in delivering commodities to many markets.

In conflict-intense regions in Darfur and parts of Kordofan, namely West Kordofan, merchants note:

- ▶ Significant increases in prices of commodities in June, in view of security concerns and the approaching rainy season.
- ▶ High security risks in trade routes and inside markets are pushing merchants to import reduced quantities, thus reducing supply in the market.
- ▶ Lack of access to banking and finance for trading activities, due to limited profitability.

In relatively safer regions like Gedaref, River Nile, White Nile, and Red Sea states, merchants note:

- ▶ Increased losses due to sharp and frequent price fluctuations.
- ▶ Frequent power cuts jeopardize capacity to store commodities; thus, reducing quantities bought by merchants and hence the supply of goods.
- ▶ The monopoly of large merchants in some states and limited competition in the market contribute to price increases.

In contested regions like North Kordofan, and formerly conflict-intense states like Khartoum, Blue Nile and Sennar states, merchants note:

- ▶ Price fluctuations amid low demand and limited running capital by merchants.
- ▶ Difficulties in marketing and lowered sales, resulting from reduced purchasing power.
- ▶ Armed robbery and fluid security situations pose concerns over the safety of commodities in markets and storage.

In response to ongoing challenges, many traders have adopted adaptive strategies to sustain operations. These coping strategies include:

- ▶ Diversifying the range of supplied commodities to better align with shifting consumer demand.
- ▶ Relocating trading activities to rural areas and establishing new market points to avoid conflict-affected urban centers.
- ▶ Expanding mobile markets to reach consumers in more stable or accessible locations.
- ▶ Forming cooperative arrangements among merchants to facilitate bulk imports from less-affected regions.
- ▶ Opening satellite branches in displacement-affected areas, such as the Red Sea state, to maintain market presence.
- ▶ Utilizing storage facilities located in safer rural zones to protect stock and ensure continuity of supply.

Merchants' profitability remains constrained by overlapping challenges at both national and regional levels amid the ongoing conflict. Across states, profits are generally low to average, with particularly poor returns reported in Khartoum, Blue Nile, and Central Darfur.

Regulatory fragmentation continues to hinder trade. In SAF-controlled areas, merchants face high tax burdens, customs duties, and local fees (e.g., cleaning and license renewals), along with frequent checkpoint delays—though Red Sea state is a partial exception. In RSF-controlled and contested areas, merchants report excessive charges for commodity entry approvals, ad hoc taxes in crop markets, and additional fees for security provision.

Conclusions

This report reveals persistent disruptions and widening disparities across Sudan's markets. While some staples, such as cereals and vegetables, exhibited relative stability in certain months, volatility across most markets remained pronounced, particularly for meat, dairy, oilseeds, and fuel. Spatial disparities, especially between conflict-affected and more stable states, persisted across most commodities, reflecting structural constraints in transport, storage, and market access.

The informal sector, particularly parallel fuel and currency markets, continues to dominate the regular market. This shift has amplified price volatility and exacerbated access challenges, especially in Darfur, Kordofan, and other conflict-intense areas. Fuel and currency shortages have cascading effects on food availability, distribution costs, and trade volume, compounding pressures on both traders and consumers.

Market actors across states reported widespread declines in demand, purchasing power, and profitability, with insecurity, logistical delays, and regulatory inconsistencies cited as major constraints. Insecurity along trade routes and within markets has driven up costs and reduced supply. Meanwhile, traders face rising taxation and fees, both formal and informal, particularly in RSF-controlled and contested areas. Despite these challenges, traders continue to adapt. Strategies include expanding mobile and rural markets, bulk purchasing collaborations, diversification of commodities, and leveraging safer regions for storage and distribution. These coping mechanisms reflect remarkable resilience but are not substitutes for coordinated intervention.

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