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Essential Commodities Prices, Availability, and Market Actors' Perceptions

August 2025

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Summary

This report presents an overview of trends in prices, availability, and quality of key commodities, while also capturing traders' perceptions of supply, demand, and market conditions in Sudan between February and August 2025.

Cereals and Vegetables. Wheat and wheat flour prices increased in early August before stabilizing later in the month, while sorghum and millet remained relatively stable. Spatial disparities persisted, with the highest cereal prices reported in West and South Darfur. Traders noted a decline in cereal availability. Vegetable prices showed mixed movements: potato and onion prices increased in August, while tomato prices fluctuated. Traders also reported declines in both availability and quality of vegetables, alongside wide regional disparities.

Animal Products. Prices of lamb, beef, fish, and eggs remained stable in August, while milk and chicken prices increased slightly. Availability trends varied by commodity, and regional disparities remained significant.

Oils, Pulses, and Sugar. Prices of sugar, groundnut, and sunflower were stable in August. In contrast, cooking oil and sesame fluctuated before declining late in the month. Fava bean prices rose steadily in August.

Fuel. Fuel markets remained volatile. In the regular market, diesel and petrol prices declined before stabilizing in August. In the parallel market, both rose in early August before stabilizing and then fell slightly by late August.

Market Perceptions. Traders continued to report persistent challenges and disruptions. Nearly 44 percent cited supply chain, logistics, security concerns, and rainy-season disruptions as the main issues. Regional disparities remained prevalent. Most traders reported no change in demand (62 percent) and either stable (40 percent) or increased (37 percent) profits in August. Nearly 80 percent reported paying local or state taxes, many linking these to inflationary pressures on prices. Looking ahead, about two-thirds of traders plan to maintain current trading levels over the next one to three months, with no major changes in volume or location.

Cereals and Flour

Wheat prices increased slightly in the last three weeks of August, while sorghum and millet prices remained stable throughout the month. Wheat flour prices stayed higher than other cereals and fluctuated between late June and August, with notable increases in the second half of the month (Figure 1).

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

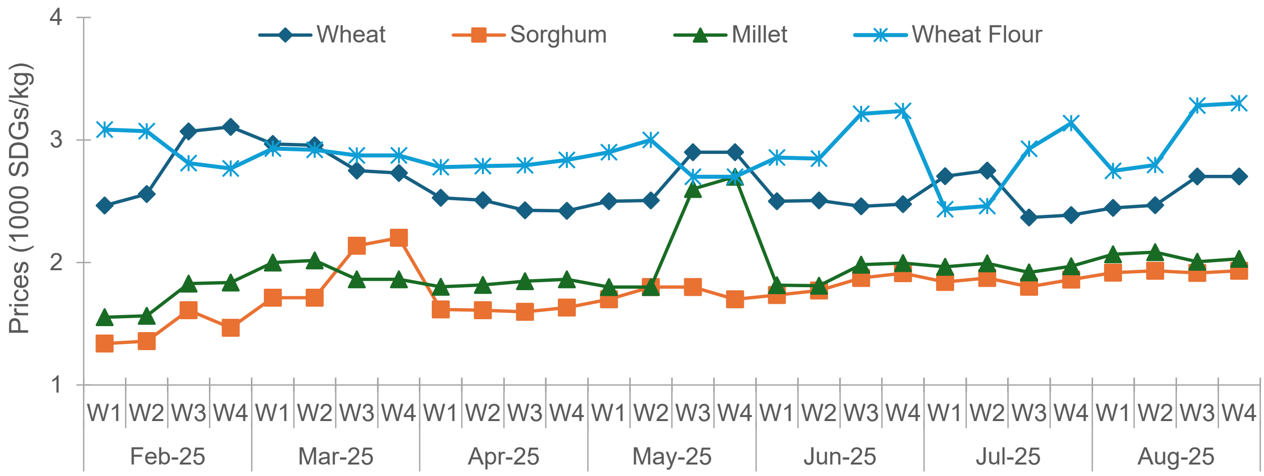


Figure 2 highlights considerable regional variations in cereal and wheat flour prices in August. Wheat prices increased slightly in West Darfur, Gedaref, River Nile, White Nile, and Northern state, with the highest levels recorded in West and South Darfur. A decline in wheat prices was observed in most other states, with the lowest recorded in Red Sea and Northern state. Sorghum and millet prices were more stable but saw modest increases in some markets, with the highest price in River Nile and the lowest in Central Darfur. Wheat flour showed a mixed trend, rising in Central, North, and South Darfur — where the highest price was observed in Central Darfur — while remaining relatively stable in most other states, with lower prices in Al Gezira and Sennar.

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

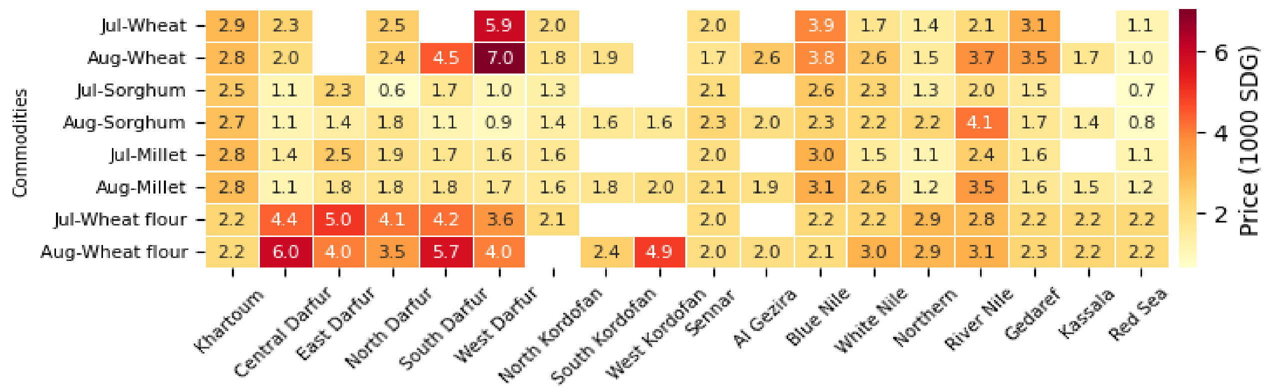


Figure 3 shows traders' perceptions of cereal and wheat flour availability between February and August 2025. The share of traders reporting high availability declined for all commodities in August compared to July. For wheat, it fell sharply from 36 percent in July to 27 percent in August. Wheat flour dropped from 65 to 48 percent, sorghum from 54 to 46 percent, and millet from 48 to 41 percent.

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

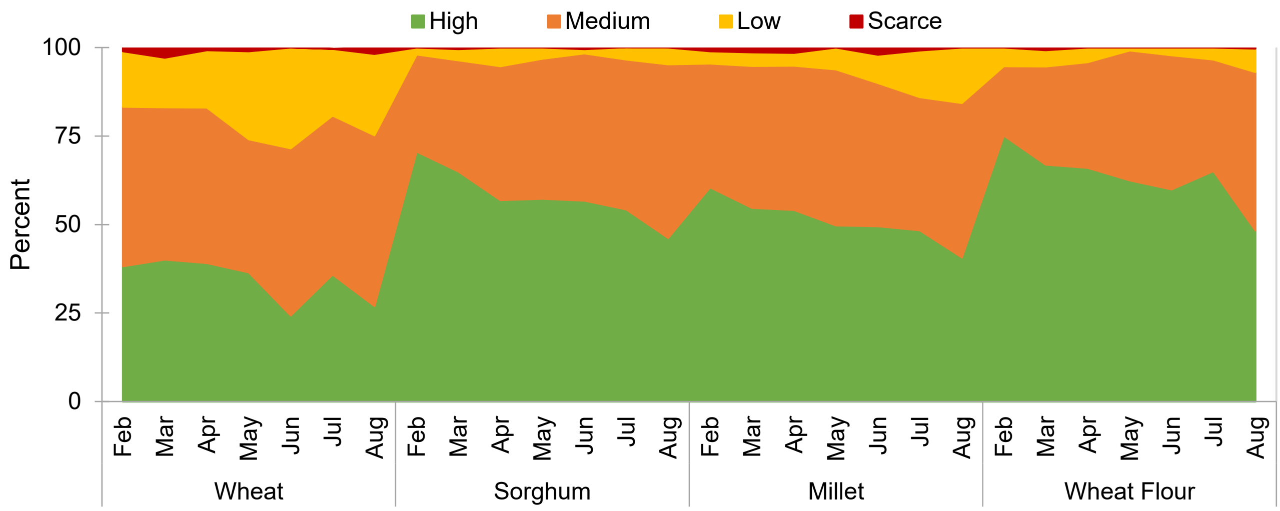
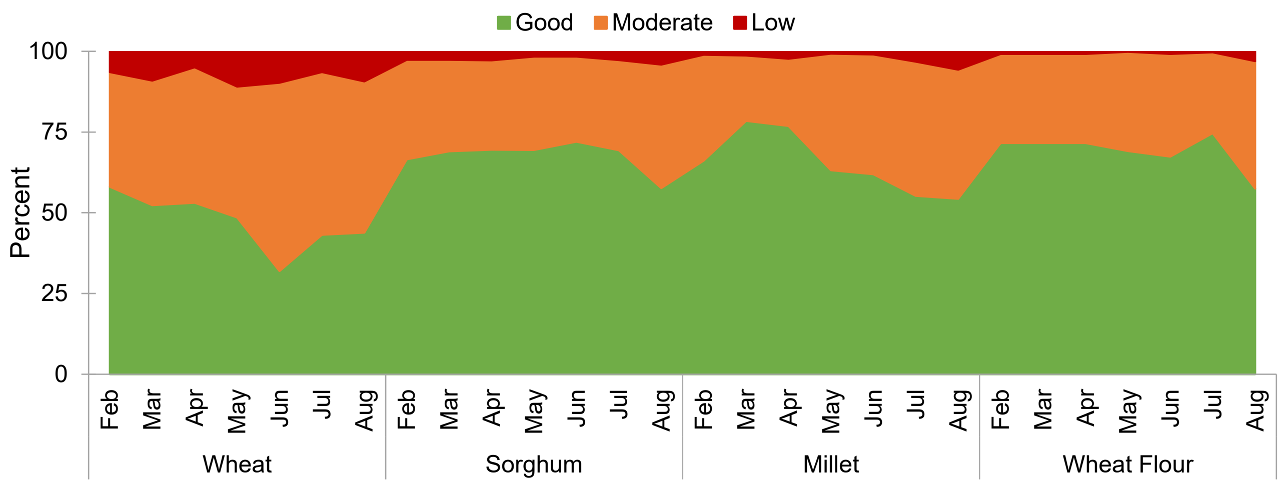


Figure 4 shows traders' perceptions of cereal and wheat flour quality between February and August 2025. Wheat quality improved marginally, with the share of traders rating it as good rising from 43 percent in July to 44 percent in August. In contrast, reported good quality declined for sorghum (69 to 58 percent) and wheat flour (75 to 58 percent), and slightly for millet (55 to 54 percent).

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



Vegetables

Vegetable prices fluctuated sharply in August, particularly for onions and tomatoes. Onion prices surged in the first two weeks before declining in the third, while tomato prices peaked in the second week and fell thereafter. Potato prices remained relatively stable throughout the month, showing less volatility than onions and tomatoes (Figure 5). These price movements were partly linked to supply conditions, as the share of traders reporting high availability of all three vegetables declined in August compared to July (Figure 7).

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

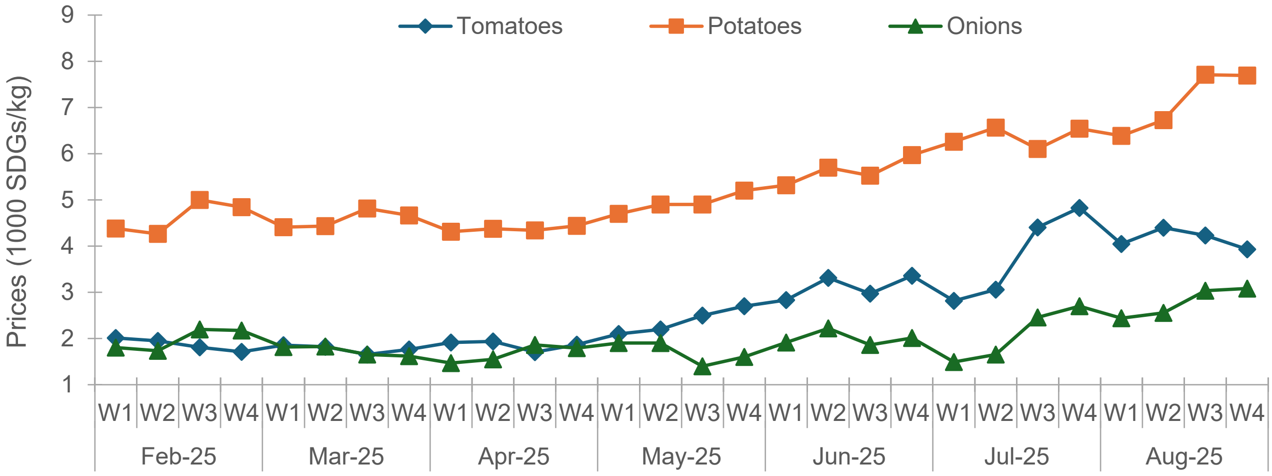


Figure 6 shows that regional disparities in vegetable prices persisted in August across Sudanese markets. Tomato prices rose significantly in most states, with the highest levels recorded in South Darfur, West Darfur, Al Gezira, and Kassala, and the lowest in Red Sea and Northern states. Potato prices also increased across most states, reaching their highest levels in the Kordofan states and West Darfur. Onion prices were relatively more stable, though variation persisted, with the highest prices reported in North Darfur and West Kordofan. These trends highlight ongoing imbalances in supply chains, availability issues, and market access across the country.

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

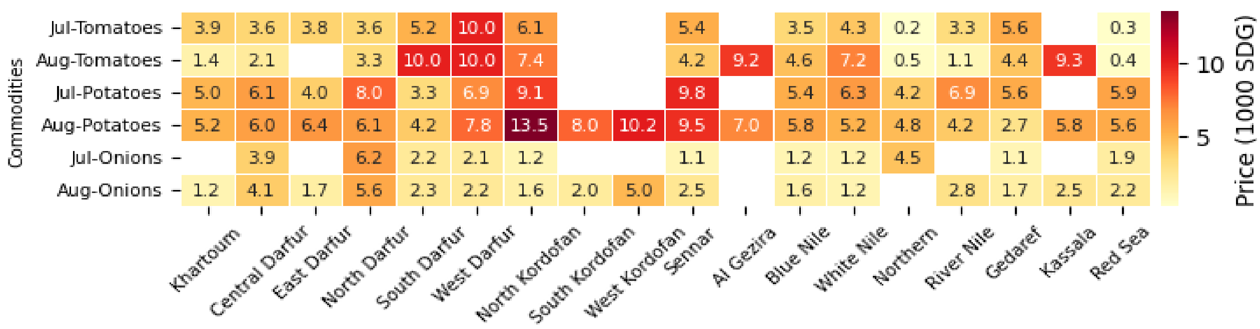


Figure 7 highlights a clear deterioration in vegetable availability in August compared to July. The share of traders reporting high availability of tomatoes dropped sharply, from 34 percent in July to just 22 percent in August, while those reporting medium availability rose from 25 percent to 49 percent over the same period. The share of traders reporting high availability also declined for potatoes (33 to 23 percent) and onions (51 to 47 percent).

Figure 7: Vegetable availability scores, February - August 2025

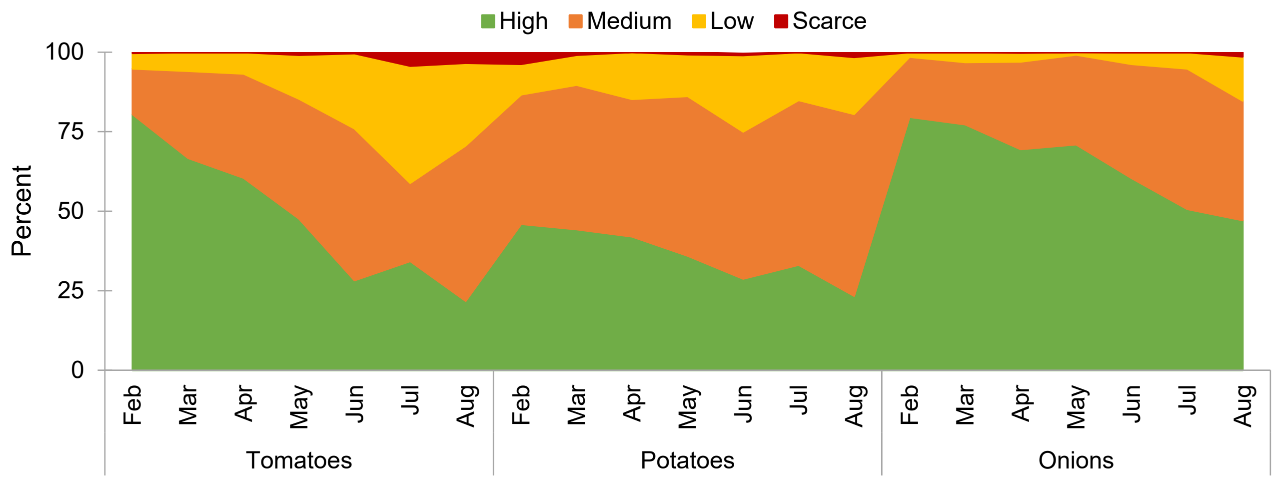
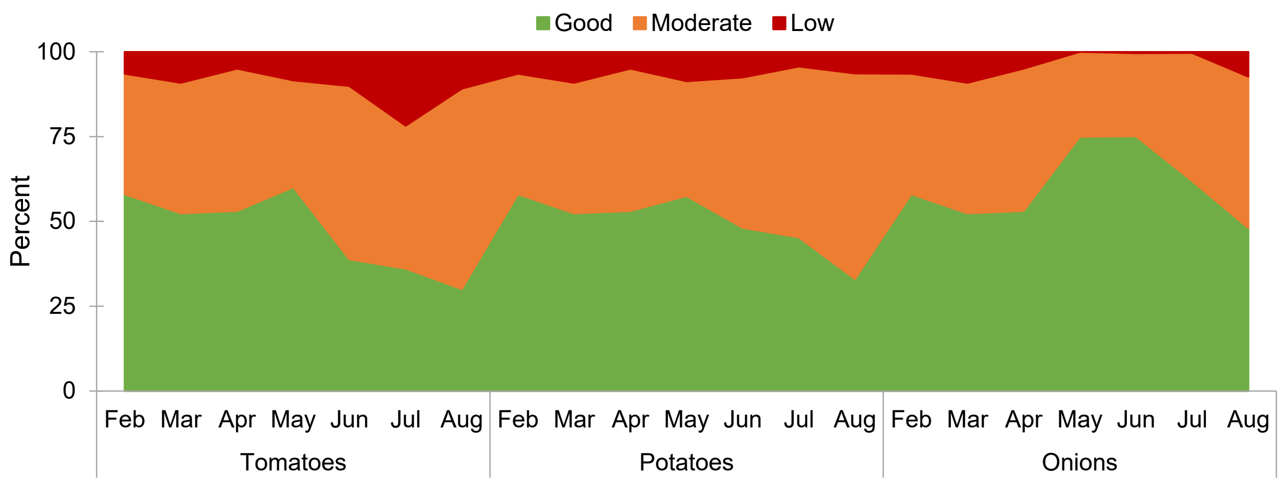


Figure 8 illustrates traders' perceptions of vegetable quality from February to August, showing a slight overall decline in the share of traders reporting good quality. For tomatoes, the share fell from 36 percent in July to 30 percent in August. For potatoes, it dropped from 45 to 33 percent, and for onions, from 62 to 48 percent

Figure 8: Vegetable quality scores, February - August 2025



Meat and Animal Products

Figure 9 shows that between February and August 2025, prices of key meat and animal products were marked by upward pressure and volatility, potentially limiting household access to essential proteins and micronutrients. Lamb prices rose steadily across the period, with only a brief pause between mid-May and mid-June. Beef prices showed signs of stabilization toward the end of July and remained steady through August. Chicken prices fluctuated, rising in early July, dipping at the end of the month, and then increasing again in August. Fish prices also rose in early July before stabilizing. Milk prices fluctuated, with peaks in March and late May, followed by a gradual upward trend. In contrast, egg prices remained stable across the reporting period with little variation.

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

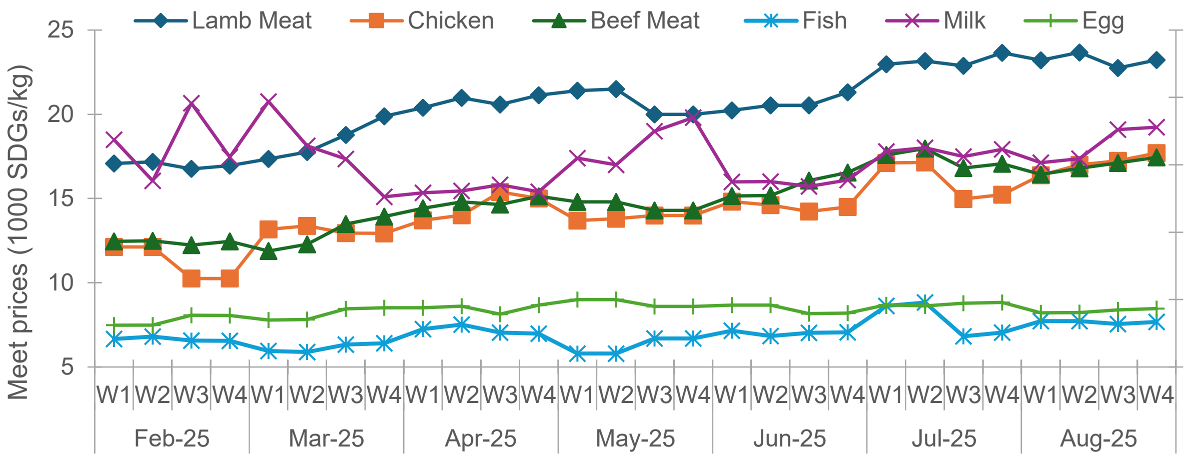


Figure 10 highlights the mixed regional trends and disparities in meat and animal product prices across Sudan's states during July and August 2025. Lamb prices rose most sharply in Khartoum, while East Darfur recorded the steepest decline. In August, the highest lamb price was observed in Al Gezira, more than four times higher than the lowest in North Darfur. Fish prices increased in most states, with the largest rise recorded in River Nile, where the August price was more than three times higher than the lowest in Blue Nile. The highest chicken price in August was observed in White Nile, while the lowest was in Central Darfur. Beef prices declined significantly overall, though the highest August price was reported in Kassala and the lowest in North Darfur.

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

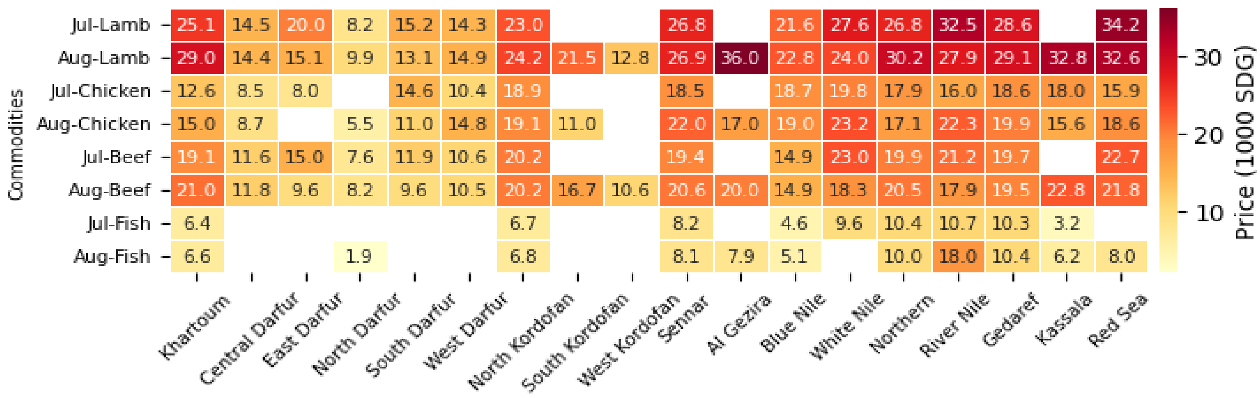


Figure 11 illustrates the varying trends in the availability of meat and animal products as reported by traders from February to August 2025. Over this period, the share of traders reporting high availability of lamb and beef steadily declined, pointing to growing supply challenges. By contrast, fish availability improved, with more traders reporting it as highly available. The availability of chicken, milk, and eggs fluctuated considerably, with a sharp decline in June. Notably, eggs consistently had the highest proportion of traders reporting low availability, underscoring persistent supply constraints.

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

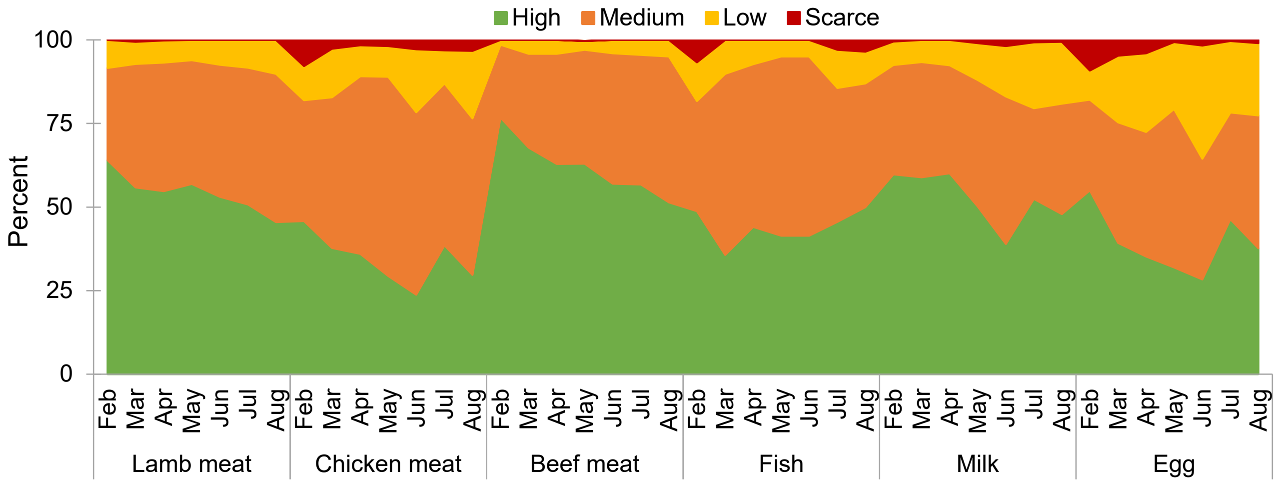
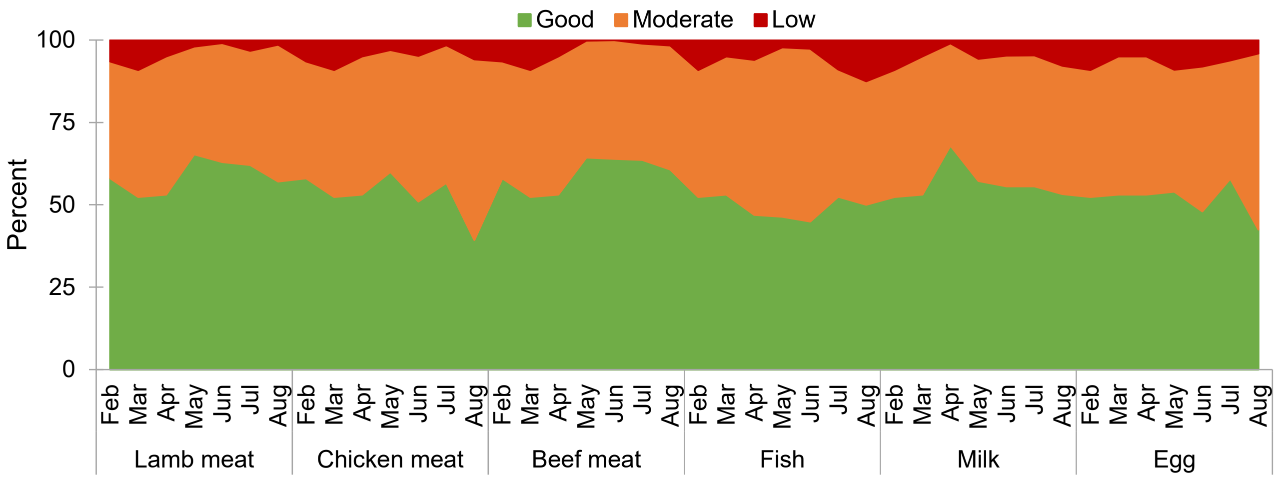


Figure 12 shows that the perceived quality of meat and animal products varied across commodities between February and August 2025. The share of traders reporting high quality of lamb, chicken, and beef declined over this period, with chicken experiencing a particularly sharp drop in August. Eggs also saw a notable decrease in reported quality in August. In contrast, the perceived quality of fish improved after July, while milk quality stabilized following a marked improvement in April.

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



Oilseeds, Cooking Oils, Sugar, and Fava Beans

Figure 13 shows mixed price movements in August 2025. Sugar prices followed an upward trend, peaking at the end of July before stabilizing in August. In contrast, both cooking oil and sesame prices declined toward the end of the month. Groundnut and sunflower prices remained stable throughout August. Fava bean prices, which had been steady since mid-May, began to rise gradually in August.

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

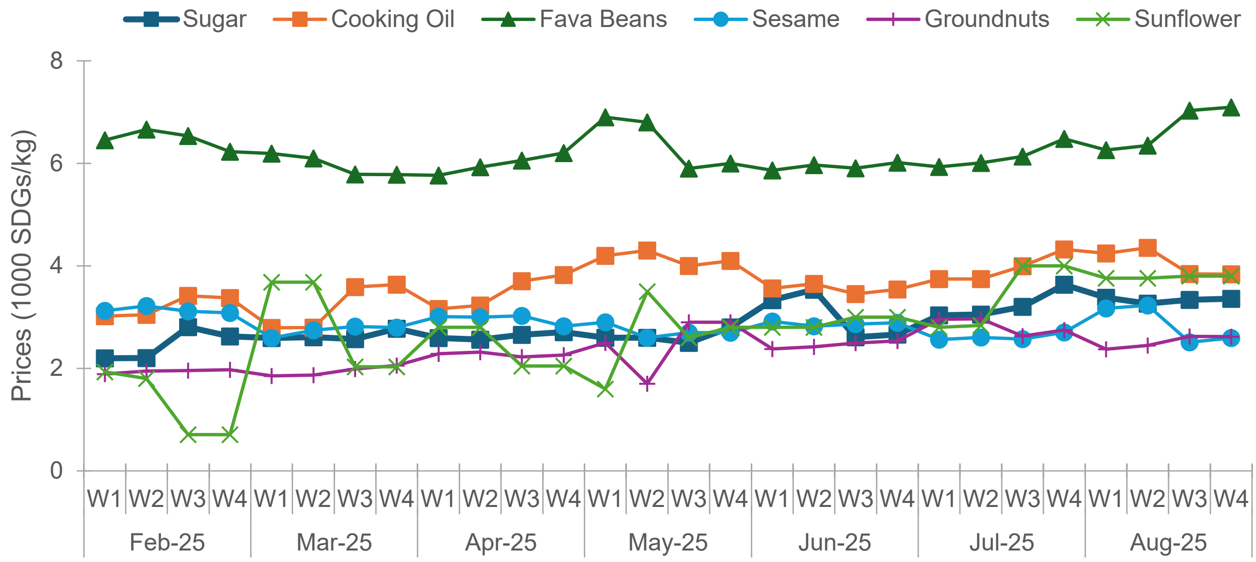


Figure 14 highlights notable shifts and regional disparities in the prices of oilseeds, cooking oils, sugar, and fava beans during July and August 2025. Sugar prices rose in most states in August, with East Darfur recording both the sharpest increase and the highest overall price. For cooking oil, the largest price increase occurred in South Darfur, while Khartoum reported the highest price. Sesame prices were also highest in Khartoum, though the largest increase was observed in Northern state. Groundnut prices rose most in South Darfur, with the highest level recorded in Red Sea. For fava beans, the steepest increase occurred in Red Sea, while South Darfur reported the highest overall price. In several cases, the highest state-level prices were more than double the lowest, underscoring significant regional disparities in market conditions.

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

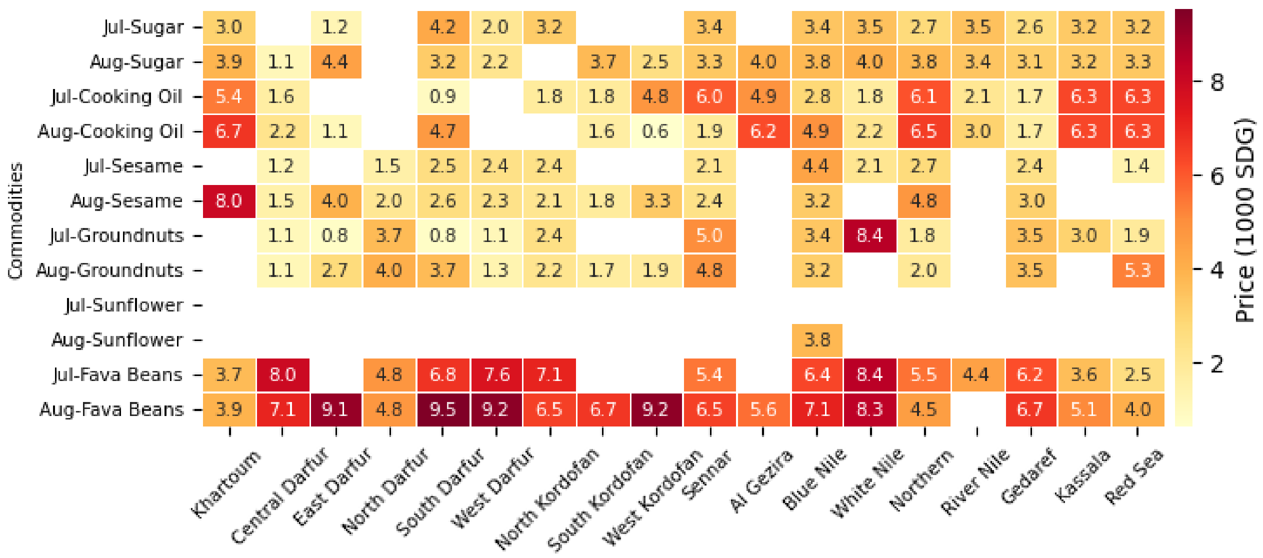


Figure 15 presents trader-reported availability trends for oilseeds, cooking oils, sugar, and fava beans between February and August 2025. Across all commodities, the share of traders reporting high availability declined. The sharpest drops were observed for cooking oil and sugar. Among the oilseeds, sunflower recorded the highest share of traders reporting low availability, signaling more severe supply constraints compared to other commodities. Fava beans, sesame, and groundnuts showed more modest declines in reported high availability over the same period.

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

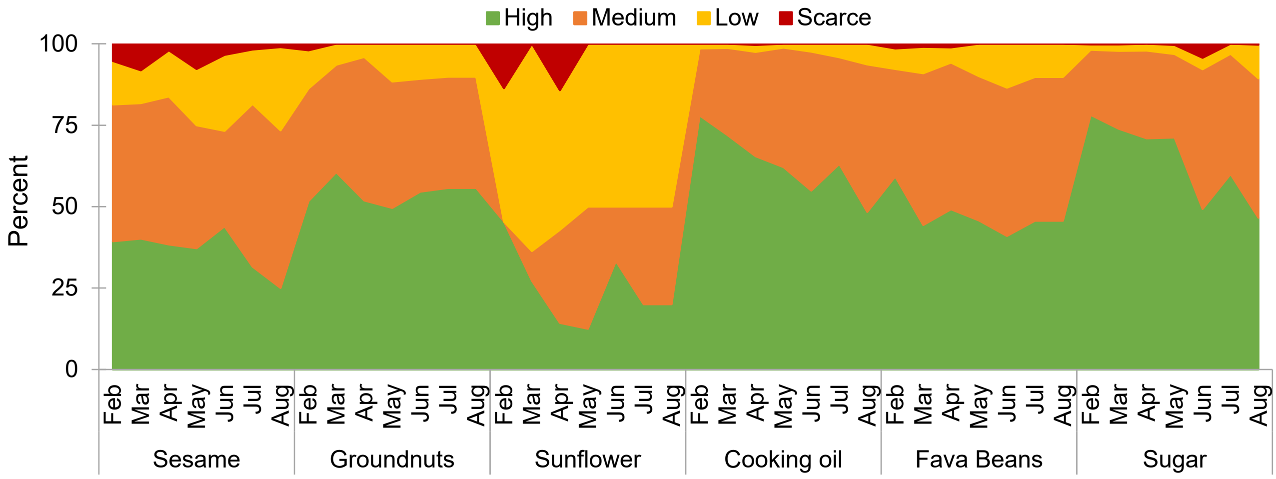
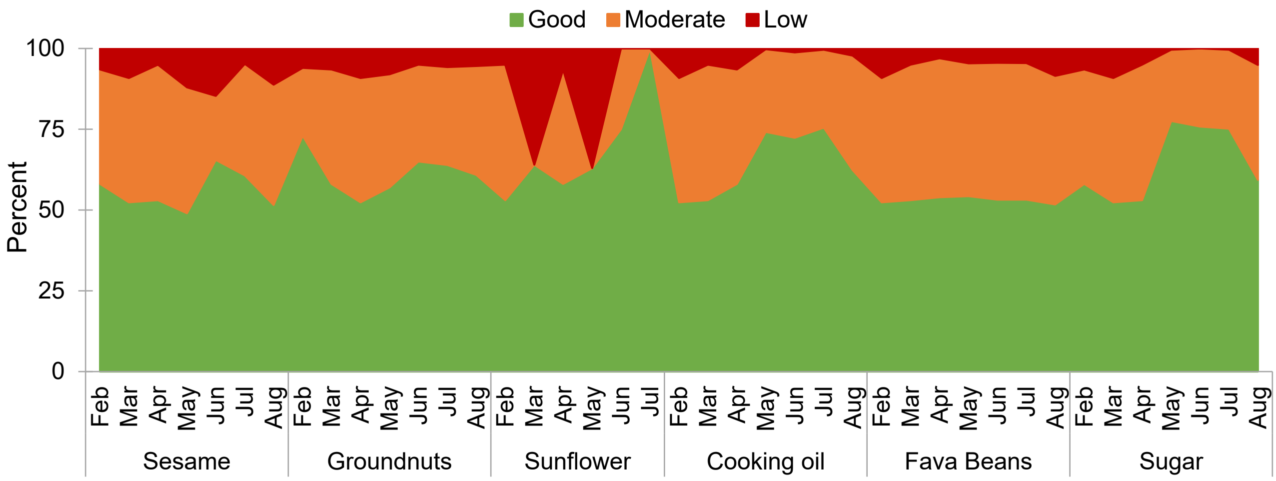


Figure 16 shows trends in the perceived quality of oilseeds, cooking oils, sugar, and fava beans between February and August 2025. Sunflower quality improved sharply, with all surveyed traders (100 percent) reporting high quality in August. The perceived quality of fava beans remained stable, with more than half of traders consistently rating them as high quality. In contrast, the share of traders reporting high quality declined for sesame, groundnuts, and sugar in August.

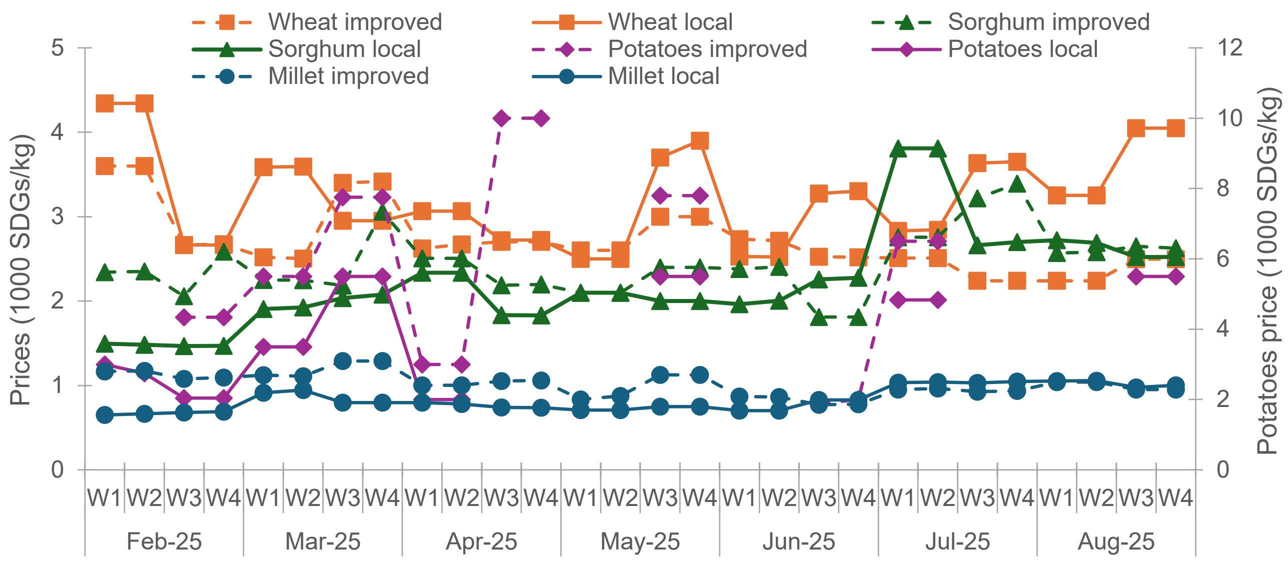
Figure 16: Oilseeds, cooking oils, sugar, and fava beans quality scores, February - August 2025



Improved and Local Seeds

Both improved and local seed prices remained relatively stable between July and August, with a few exceptions. Improved wheat prices were largely steady, while local wheat prices showed significant fluctuations during the period. Improved sorghum prices fluctuated slightly in late July and early August before stabilizing, whereas local sorghum prices were stable from mid-July onward, following a sharp peak in early July. In contrast, both improved and local millet prices remained consistently stable throughout the two months.

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



Diesel and Petrol

Figure 18 shows that petrol prices in the regular market declined steadily in August, falling from 5,499 SDG to 4,601 SDG before stabilizing at 4,741 SDG toward the end of the month. By contrast, parallel market petrol prices rose sharply in July (from 5,364 to 6,631 SDG) and then eased slightly in August, falling from 6,742 SDG in week 2 to 6,310 SDG in week 4. Diesel prices followed a similar pattern: in the regular market, prices dropped substantially from 4,803 SDG in week 2 to 4,287 SDG in week 3, while in the parallel market, they increased from mid-July to mid-August before stabilizing and declining slightly in late August. Across the month, parallel market prices for both petrol and diesel consistently exceeded regular market prices.

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

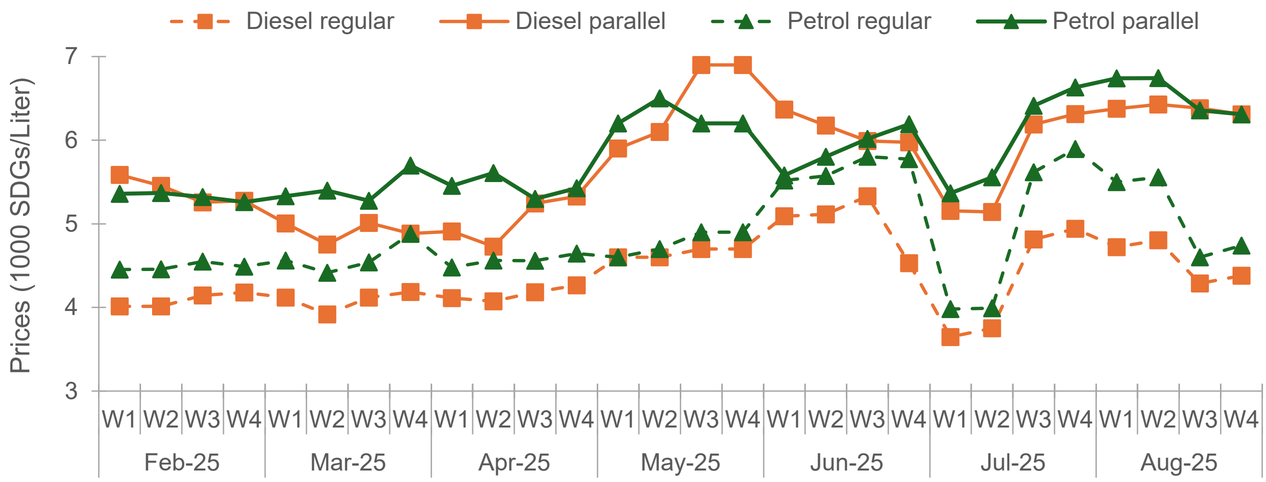
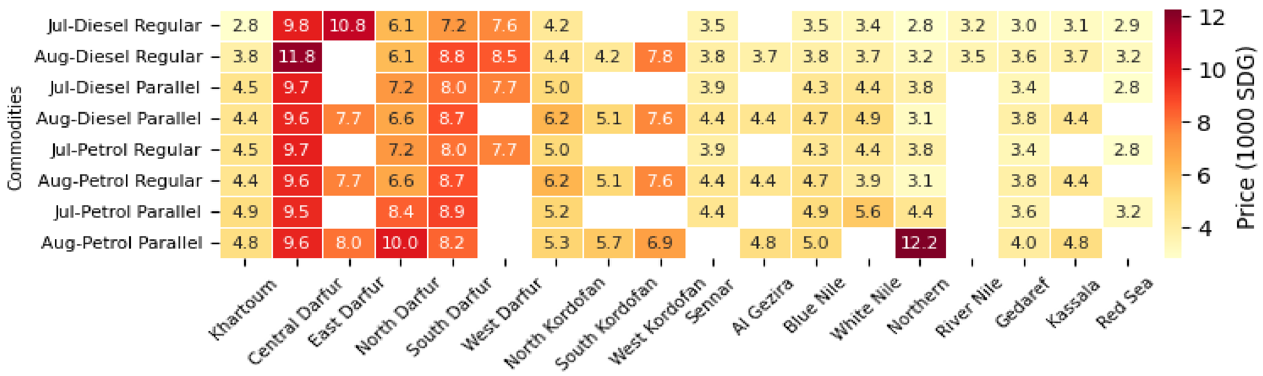


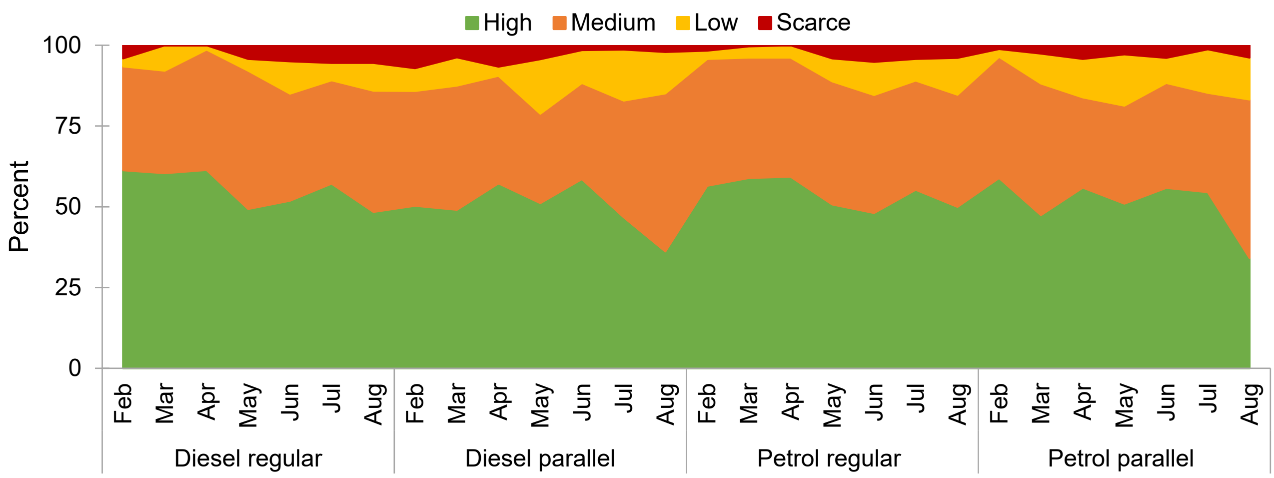
Figure 19 presents both spatial and temporal disparities in fuel prices across states. The figure highlights substantial spatial variation, with only modest temporal changes between July and August. Fuel prices remained markedly higher in the Darfur states compared to other regions. For example, in August, the regular market price of diesel reached about 12,000 SDG per liter in Central Darfur, while prices in Khartoum, Northern, Gedaref, and Red Sea states stayed below 4,000 SDG per liter. Regular market petrol prices showed a slight overall increase in August relative to July but remained largely stable in most states. In contrast, spatial differences were striking, ranging from 3,080 SDG per liter in Northern state to 9,558 SDG per liter in Central Darfur.

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



Traders' perceptions of fuel availability declined in August compared to July in both the regular and parallel markets. In the regular market, the share of traders reporting high availability of diesel fell from 57 to 48 percent, while for petrol it declined from 55 to 50 percent. Even so, most traders continued to report either medium or high availability of fuel products overall. A similar pattern was observed in the parallel market for both diesel and petrol.

Figure 20: Fuel availability scores, February - August 2025



Exchange Rates

Between mid-July and mid-August, both official and parallel exchange rates rose sharply. The parallel rate increased from mid-July, peaking at just above 3,078 SDG/USD in early August, before declining toward the end of the month. The official rate also rose during this period, reaching its peak in week 3 of August. Notably, in week 3, the gap between the two rates narrowed significantly, suggesting a temporary convergence in official and parallel market dynamics before widening again in the final week. Overall, parallel rates consistently remained above official rates despite the brief narrowing.

Figure 21: Exchange Rate, SDG/US Dollar, February – August 2025

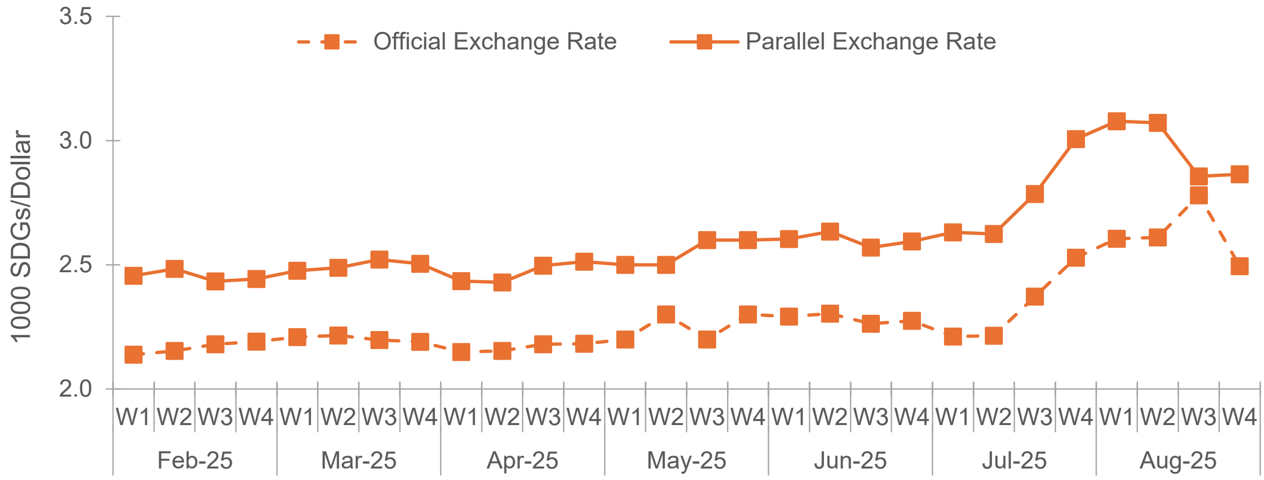
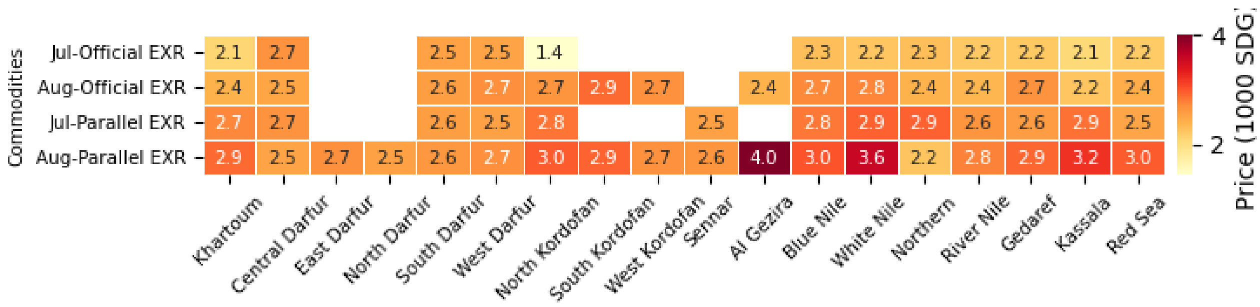


Figure 22 shows temporal and spatial variations in official and parallel exchange rates during July and August. The data reveal substantial spatial disparities, with only modest temporal changes over the two months. In the official market, the exchange rate in North Kordofan rose sharply from 1,431 SDG/USD to 2,652 SDG/USD, while in South Kordofan it was even higher, at 2,887 SDG/USD. In the parallel market, spatial variation was more pronounced, with the highest rate observed in Al Gezira. By contrast, Northern state experienced a marked decline, with the rate falling from 2,946 SDG/USD in July to 2,250 SDG/USD in August. Consistent with national trends (Figure 21), parallel rates remained above official rates in most states.

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



Market Actors' Perceptions

In August 2025, 146 merchants across 14 states were surveyed about market functionality. The results highlight persistent challenges linked to supply chains, demand, financial conditions, storage, and security, alongside modest changes in profits, the burden of taxes and fees, and cautious future plans.

Challenges Facing Merchants

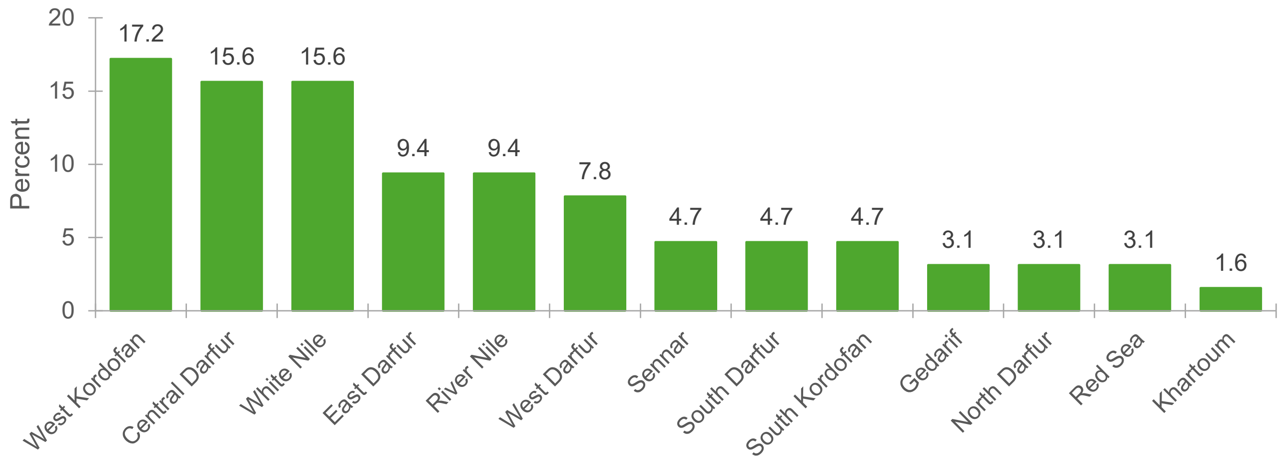
Supply Chain and Logistics

The share of merchants reporting transportation and logistical problems rose slightly compared to July. Figure 23 shows that these challenges were concentrated in West Kordofan, Central Darfur, and White Nile, while merchants in North Kordofan and Khartoum reported relatively fewer difficulties.

In the Kordofan and Darfur regions, heavy rains flooded valleys and blocked roads, leading to long transit delays and higher transport costs. Some merchants reported that goods imported from Al-

Dabba took up to two to three months to arrive. Higher fuel prices further exacerbated costs, while fuel scarcity in White Nile created additional constraints.

Figure 23: Proportion of merchants facing supply chain challenges, by state (N=64)



Merchants in West Darfur specifically reported severe scarcity of urea in August. Traders in River Nile, Red Sea, Gedaref, and Sennar noted significant increases in the prices of vegetables and fruits. In response, merchants sought to maintain profit margins by raising prices or bulk-buying to spread transportation costs. Other strategies included focusing on seasonal commodities in Darfur and relying on intra-state purchases in White Nile.

Demand Conditions

About two in five merchants (38.4 percent) reported changes in demand in August. Declines were most evident in Central Darfur, Red Sea, and West Kordofan, while demand remained relatively stable in North Kordofan, River Nile, Sennar, and White Nile.

Merchants in Central Darfur linked reduced demand to higher import costs. In Red Sea, demand fell due to price increases, which were aggravated by higher storage costs during frequent power cuts. West Kordofan traders cited liquidity shortages and deteriorating household incomes. By contrast, in Khartoum, merchants reported an increase in demand, attributed to the influx of returnees

Financial and Liquidity Constraints

The financial and liquidity challenges eased somewhat between July and August. In August, 73.3 percent of merchants across the 14 states reported no financial or liquidity difficulties, compared to 60.9 percent in July — showing improved access to cash and transactions.

However, significant regional variation persists. In East Darfur, West Darfur, West Kordofan, and Red Sea, liquidity problems remain high: 66.7 percent, 60 percent, 57.1 percent, and 46.1 percent of surveyed merchants in these states, respectively, reported difficulties. Notably, even in these states, the proportions are lower than in July, suggesting modest improvement.

Merchants in Darfur and Kordofan attributed liquidity problems to the continuation of bank closures, limited access to cash, and shortages among consumers, which constrained trade. In Red Sea, despite widespread cash shortages, the use of mobile banking apps like Bankak allowed transactions to continue. In banked states such as Sennar, Khartoum, and White Nile, merchants reported that cash withdrawal caps by banks limited their ability to import adequate quantities.

Liquidity constraints also affected labor: some merchants reduced or avoided hiring daily workers. However, about half of the surveyed merchants reported no challenges in paying daily workers, particularly in North Kordofan, Sennar, and White Nile, where more adaptive payment arrangements were in place. Merchants in Red Sea and Gedaref also reported only minimal challenges in paying laborers.

Storage and Power Access

Most merchants reported no major storage problems in August, though the share was slightly lower than in July. 87.6 percent of merchants indicated no storage challenges in August, compared to 89.8 percent in July.

Storage difficulties were concentrated in River Nile (30.7 percent), Red Sea (30 percent), Central Darfur (27.2 percent), and West Kordofan (23 percent) as informed by traders reporting storage challenges. In River Nile and Red Sea, traders linked these problems to frequent power outages during the summer season, which damaged goods and forced reliance on costly alternative electricity sources. In Central Darfur, limited secure storage within markets compelled merchants to move goods daily to and from markets to avoid theft and looting, which raised transport costs and prices. Similarly, in West Kordofan, conflict risks forced merchants to store goods at home rather than in markets.

Safety and Security

Market safety showed slight improvement in August compared to July. Only 4.1 percent of merchants reported severe insecurity and lack of safety in August, down from 6.5 percent in July. Security problems, however, persisted in some states. Merchants in West Kordofan voiced concerns about the potential escalation of conflict and market destruction, citing fear of combat, airstrikes, or drones in densely populated markets. In South Darfur and other Darfur states, merchants reported incidents of armed robbery within markets and along trade routes. These threats create uncertainty, raise risks of capital loss, and contribute to unstable prices and profits.

Profits and Profitability Trends

Merchants across the 14 states surveyed in August reported either increases or no change in profits compared to July. Figure 24 shows that 39.7 percent of merchants indicated no change in profits over the last month. The share of merchants reporting profit increases rose slightly, reaching about 37 percent in August, compared to 34 percent in July.

Figure 24: Changes in merchants' profits

Among those who experienced profit declines, 33.3 percent were in White Nile, followed by 15.1 percent in North Darfur and 12.1 percent in Khartoum. By contrast, among merchants reporting profit increases, the largest shares were in Sennar (22.2 percent), North Kordofan (16.7 percent), and

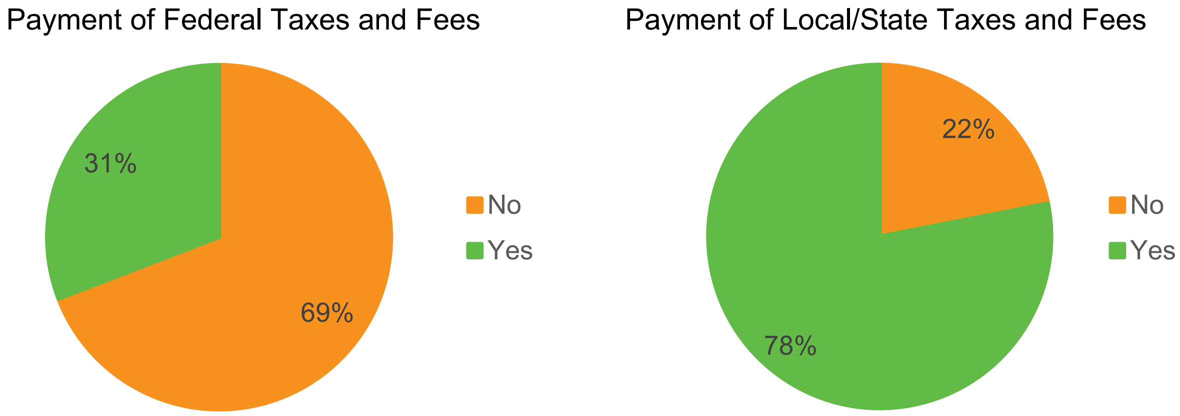
West Kordofan (14.8 percent). Overall, stability in profits dominated, particularly in River Nile and North Kordofan, where most traders reported no change compared to July.

Taxes and Fees

Merchants also reported that taxes, customs, and levies contribute to inflationary pressures, raising commodity prices and reducing demand. Figure 25 shows that 78 percent of merchants pay local or state taxes, while only 30.8 percent pay federal taxes or customs.

At the federal level, the most common tax cited was the value-added tax on tradable commodities, along with trade licenses, annual profit taxes, and customs duties. At the state and locality levels, merchants often pay monthly or weekly fees for market organization, cleaning, health safety, and Zakat.

Figure 25: Payments of Federal and Local taxes and government fees



Merchants in River Nile and White Nile states accounted for the largest shares of tax-paying traders, while those in North Kordofan and West Kordofan were more likely to report not paying federal taxes. Of those paying federal taxes, 51 percent believed these payments were beneficial for domestic trade. However, many also stressed that high federal taxes cut into profit margins and force traders to raise commodity prices, adding to inflationary pressures.

By contrast, state and locality fees were perceived somewhat more positively. 60.5 percent of merchants considered them beneficial for market functionality, with White Nile and North Kordofan traders making up large shares of those who pay such fees. These payments typically covered market organization and cleaning services. Still, in the Darfur states, many traders reported no formal state or locality fees, instead paying ad hoc weekly or monthly charges to local authorities for market security.

Traders' Future Outlook

When asked about their expectations for the next one to three months, most merchants reported that they plan to continue trading at current levels without major changes in volume or location. 63.1 percent of surveyed merchants indicated no planned changes.

A smaller share, 17.8 percent, planned to increase the volume of goods traded. This was most notable in Khartoum, where returnees have boosted demand, and in North Kordofan, where market functionality has improved.

Only 2.7 percent of merchants reported plans to reduce trade volumes, citing challenges such as power outages and heavy rains that have disrupted storage and transport, particularly in White Nile and Red Sea. Another 2.7 percent planned to change the type of goods traded — mainly in North

Darfur, West Kordofan, and White Nile — pointing to the seasonal nature of homegrown commodities that were more accessible and affordable.

Finally, 6.1 percent of merchants expressed uncertainty about their operations in the next one to three months.

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