

Essential Commodities Prices, Availability, and Market Actors' Perceptions

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Summary

This report presents an overview of trends in prices, availability, and quality of key commodities in Sudan from February to May 2025. It covers cereals, vegetables, animal products, and other essential commodities such as cooking oil, sugar, agricultural inputs (fertilizers and seeds), fuels, and exchange rates. The analysis reveals notable spatial and temporal disparities in prices, availability, and quality across Sudan's 18 states.

Cereal prices showed mixed patterns: wheat and millet prices were stable throughout April and early May but rose sharply starting in the second week of May. Sorghum prices remained low and stable over April and May. In contrast, wheat flour prices dropped starting from the second week of May. Spatial disparities were particularly evident for wheat and wheat flour. Traders consistently reported stable availability and quality for most cereals. Vegetable prices varied significantly. While prices of both potatoes and tomatoes show a gradual upward trend during May, onion prices dropped during May. Additionally, potato prices were consistently higher than other vegetables. Spatial and temporal differences in prices were also prominent, particularly in potato prices.

The prices of animal products remained stable during May, except for the prices of Milk, which increased substantially, while lamb meat dropped slightly during May. Among agricultural inputs, improved seed prices of wheat, sorghum, and millet show a gradual upward trend during May, while prices of local seeds of wheat, sorghum, and millet remained stable. Fertilizer prices fluctuated: urea prices experienced a modest increase during May, while DAP prices remained low and stable from April through May. Fuel prices demonstrated a gradual upward trend during May, except petrol prices in the parallel market. Prices were notably higher in the parallel market, while diesel and petrol prices in the regular market were relatively stable. Finally, the exchange rate dynamics showed a continued premium in the parallel market. Additionally, while the official rate increases modestly in mid-May before stabilizing, the parallel rate rises more sharply toward the end of May.

Cereals and Flour

Wheat prices remained relatively low and stable throughout April and early May but rose sharply starting in the second week of May, indicating a decline in wheat availability in the market (Figure 3). Similarly, millet prices were stable until early May, after which they increased significantly, also suggesting reduced availability as confirmed by traders' perception shown in Figure 3. Sorghum prices remained consistently low and stable over April and May. In contrast, while wheat flour price remained relatively stable over the three months, it began to decline after the second week of May.

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

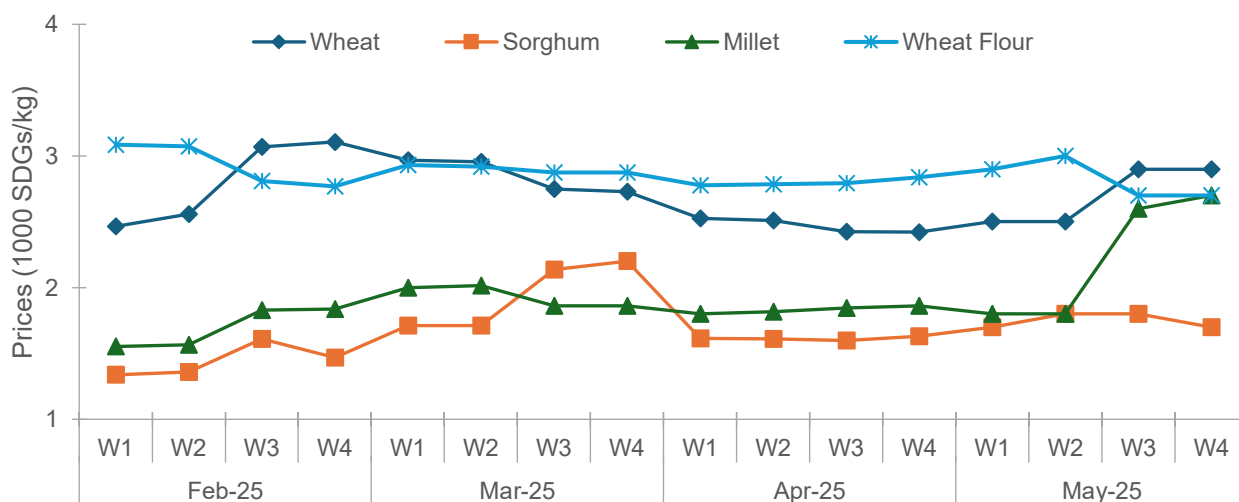


Figure 2 highlights significant regional variation in cereal prices. Wheat prices vary most significantly, with the highest recorded in West Darfur and the lowest in East Darfur, indicating significant disparities in supply constraints across states. Millet prices also vary considerably, peaking in North Darfur and reaching their lowest in Sennar. Wheat flour exhibits similar spatial variation, with particularly high prices in South Kordofan and North Darfur. In contrast, sorghum prices remain relatively stable across both space and time, suggesting more consistent supply chains.

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

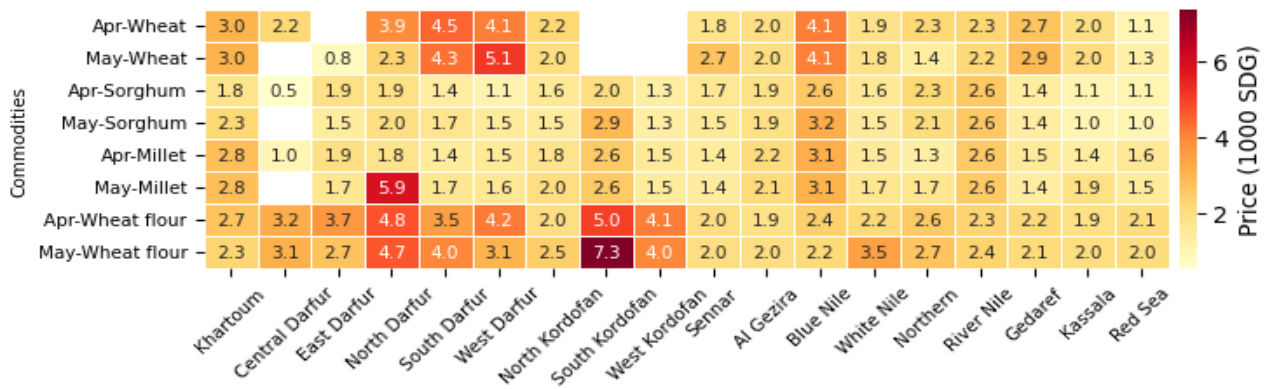


Figure 3 illustrates reported availability trends for wheat and other cereals from February to May. The data indicates a notable decline in the proportion of traders reporting high availability in May, particularly for sorghum. The share of traders indicating high availability of sorghum dropped significantly, from 71 percent in February to just 57 percent in May. Wheat availability also showed signs of deterioration. In May, 25 percent of traders reported low availability of wheat, up from 16 percent in February. These trends suggest growing supply constraints and increasing pressures on cereal markets.

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

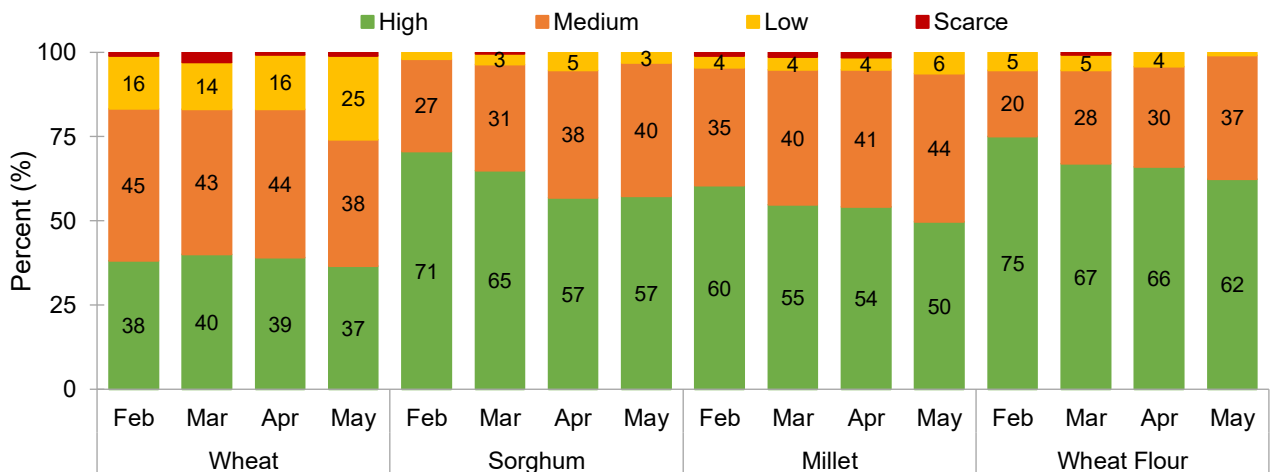
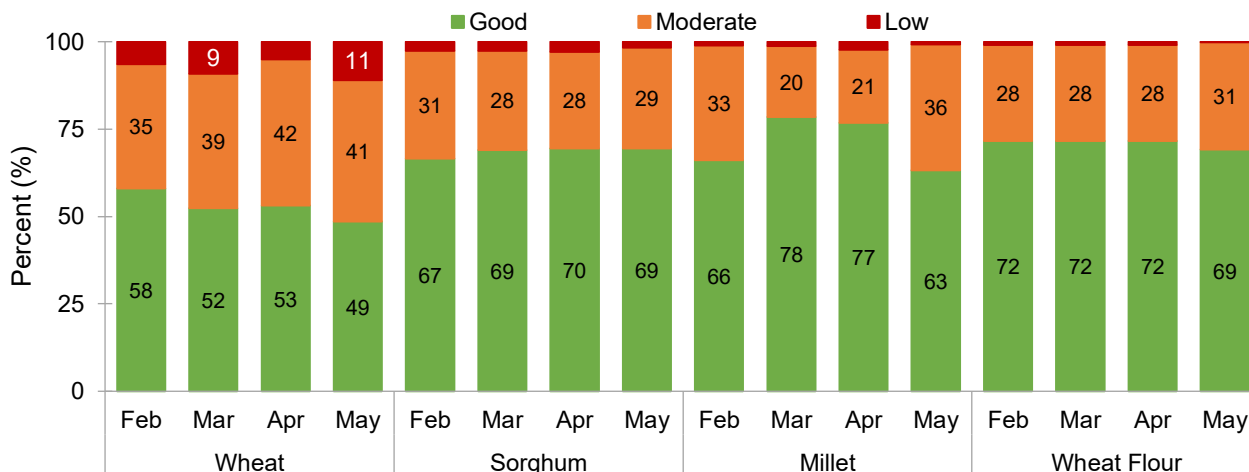


Figure 4 shows consistently high perceived quality for cereals and wheat flour. Most traders rated quality as good or moderate, with only minor reports of low quality. Wheat showed slight declines in good ratings over time, while sorghum, millet, and wheat flour maintained strong quality perceptions, with over two-thirds of traders rating them as good throughout the period.

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



Vegetables

Figure 5 shows stable tomato prices throughout the February to April period, reflecting consistent supply across markets during that period. However, prices increased steadily in May, which could suggest supply constraints driven by seasonal changes or logistical disruptions, which is confirmed by the availability scores reported in Figure 7. Potato prices were consistently higher than other vegetables, peaked in late February, and gradually increased again in May after a period of relative stability during March and April. Onion prices showed a fluctuating trend – declined steadily from February to early April, then rebounded slightly toward the end of April into May. Compared to other essential commodities, like cereals, vegetable prices remained generally more stable with fewer sharp fluctuations.

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

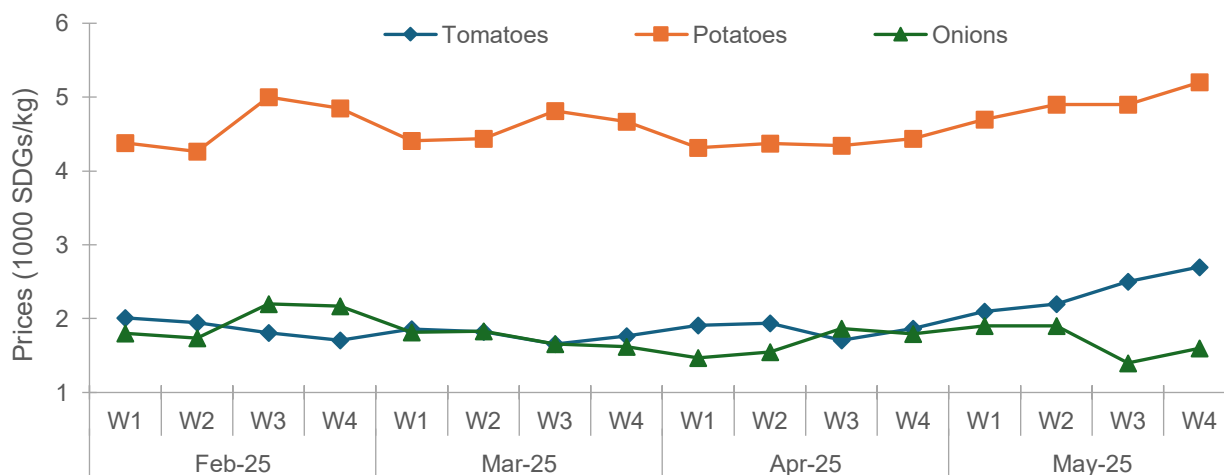


Figure 6 shows significant regional and temporal variation in vegetable prices. Tomato prices vary widely, with the highest prices in West Kordofan and Al Gezira, over six times higher than the lowest recorded. Potato prices are highest in all Kordofan states, North and West Darfur states, showing sharp regional disparities. Onion prices are more stable but still vary across states, with peaks in South Kordofan. These trends reflect uneven supply and distribution across regions.

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

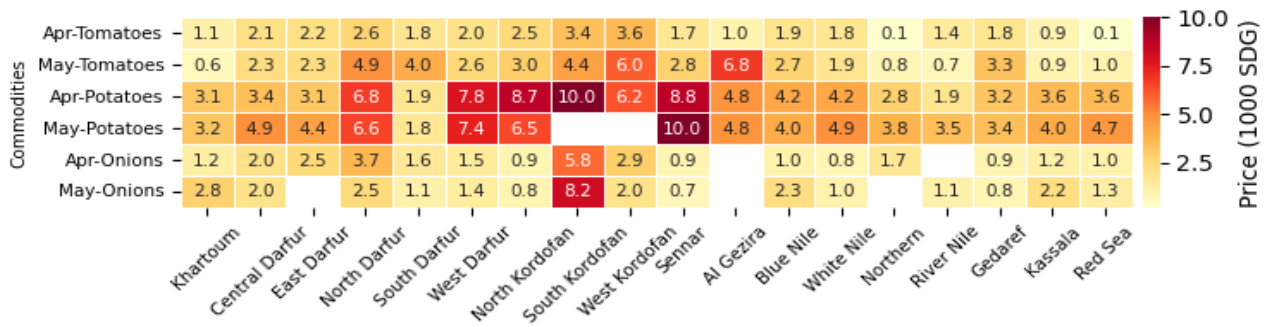


Figure 7 highlights a clear deterioration in the availability of tomatoes and potatoes in May. The share of traders reporting high availability of tomatoes dropped sharply—from 80 percent in February to just 48 percent in May. Meanwhile, those reporting low availability rose from 5 percent to 14 percent over the same period. In contrast, onion availability remained relatively stable throughout the reporting period.

Figure 7: Vegetables availability scores, February - May 2025

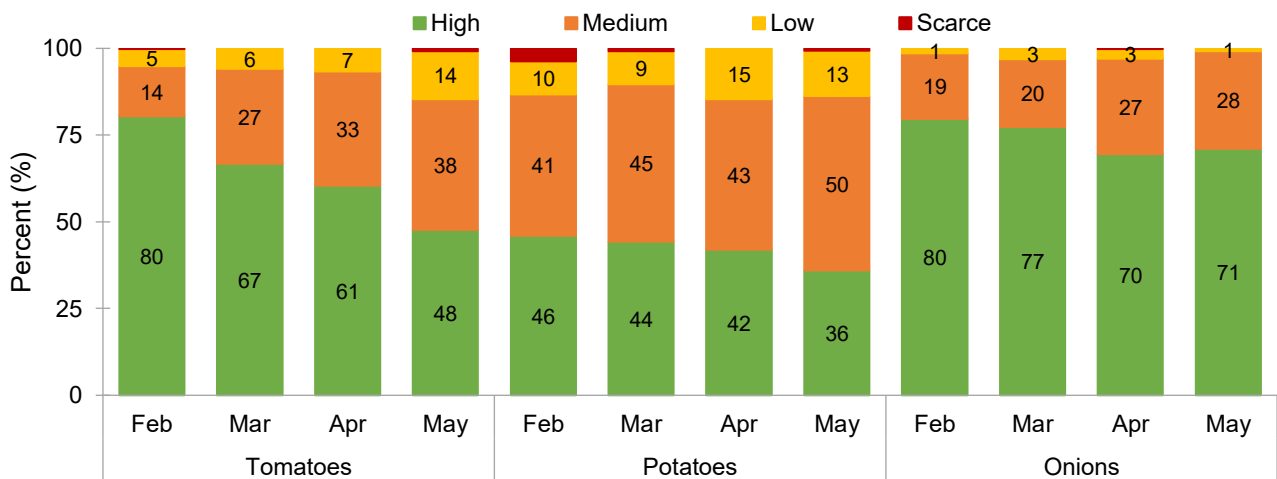
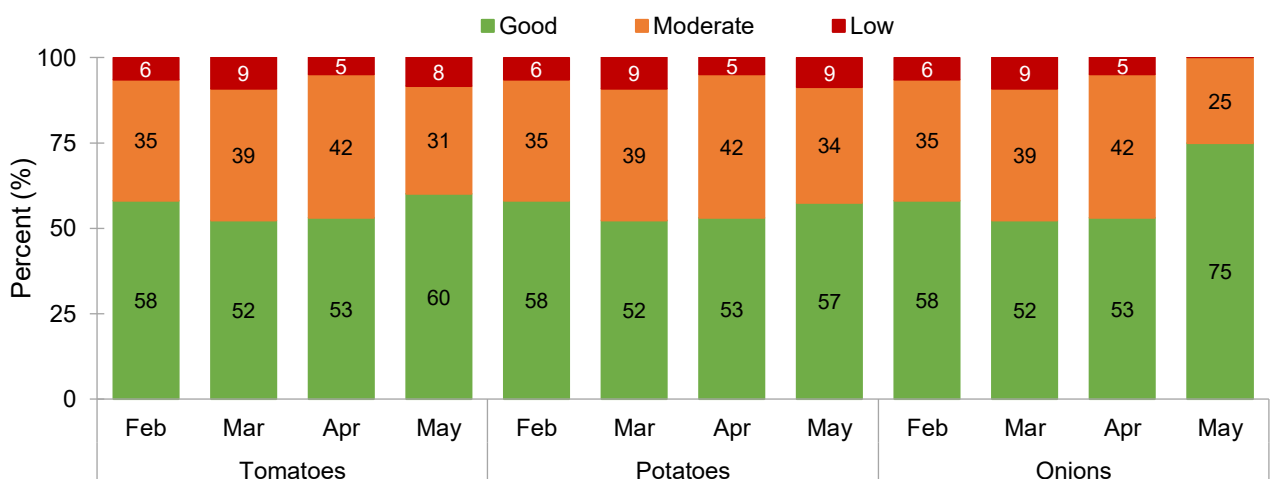


Figure 8 shows stable and increasing quality perceptions for tomatoes, potatoes, and onions, with most traders reporting good or moderate quality. Vegetable quality improved over time, with a growing share of traders rating it as good.

Figure 8: Vegetables quality scores, February - May 2025



Meat and Animal Products

Figure 9 shows consistent price increases for lamb, chicken, and beef meat from February to May 2025. Lamb meat rose steadily, peaking in the third week of May before a slight drop. Chicken and beef showed moderate but consistent increases. Fish prices remained volatile, reflecting unstable supply. Egg prices gradually increased, while milk prices declined during February and March, then rose sharply in April and May—indicating reduced availability (see Figure 11).

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

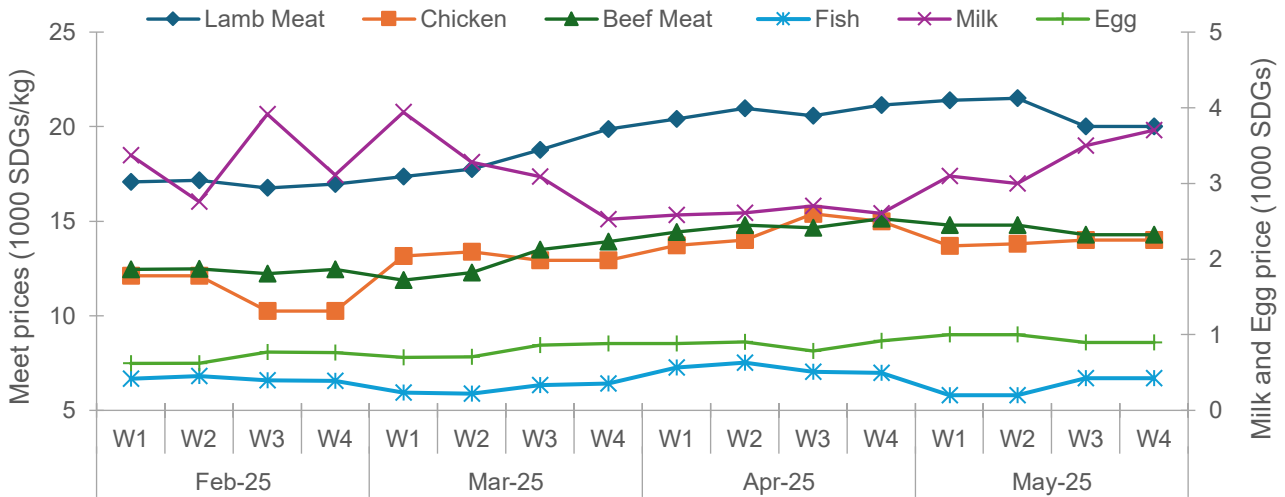


Figure 10 highlights sharp regional and temporal disparities in meat prices. Lamb and chicken prices vary significantly, with the highest prices – in the Red Sea state – nearly three times the lowest, and notable increases in several states over time. Beef prices show moderate spatial variation but are more stable overall, with the highest prices in the Red Sea state, and the lowest prices in West Darfur and West Kordofan states. Fish prices are consistent across states, with limited changes over time and with highest prices in May reported in Gadaref and Northern states. Egg prices show the least variation, while milk prices remain stable over time but differ across regions.

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

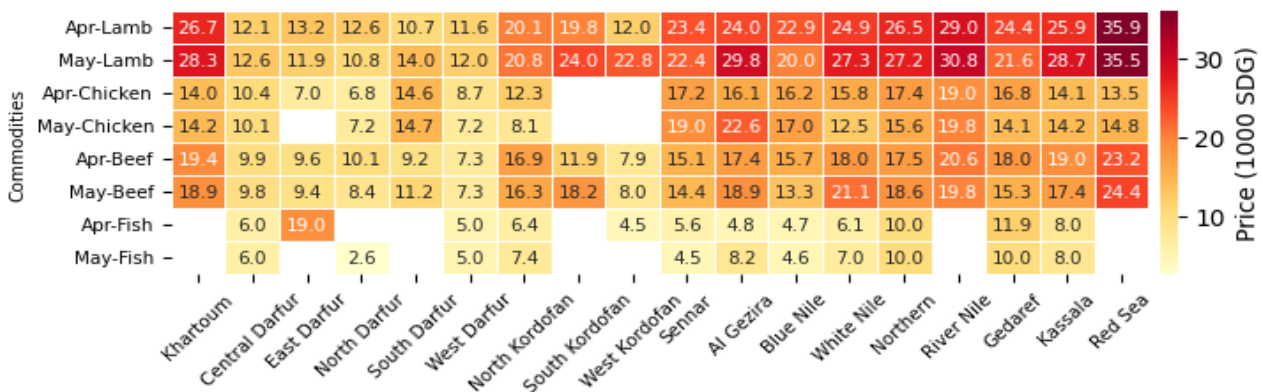


Figure 11 presents a mixed trend in the availability of meat and animal products. Availability of lamb meat and milk remained relatively stable throughout the reporting period. In contrast, chicken meat and eggs experienced a sharp decline in the proportion of traders reporting high availability between February to May. While fish availability fluctuated over the period.

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

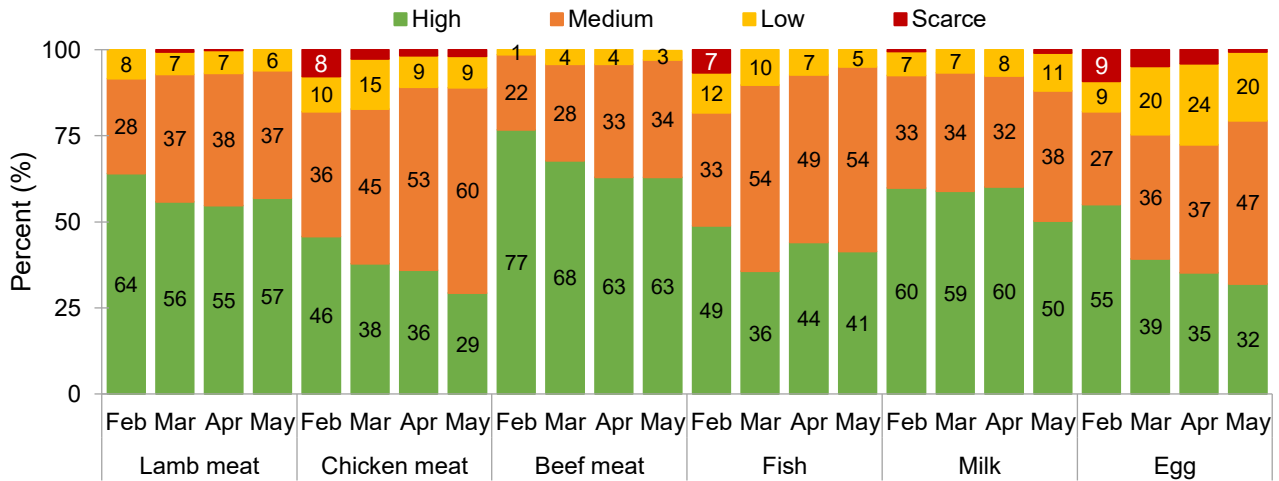
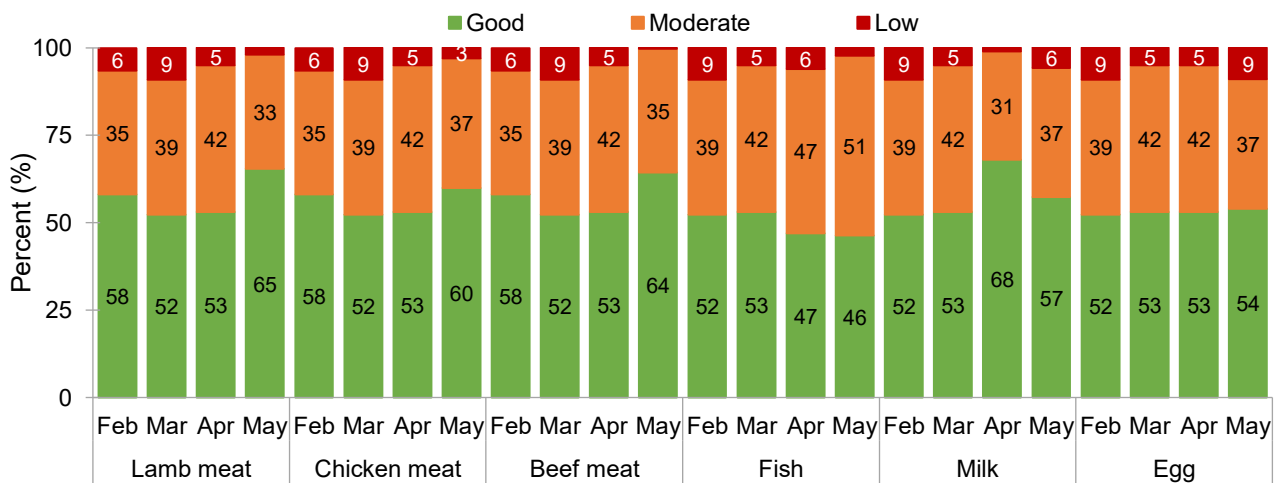


Figure 12 shows a general decline in reported quality for meat and animal products between February and May 2025. The share of products rated as “good” decreased over time, while those rated as “moderate” or “low” increased, indicating a gradual deterioration in quality. This trend was most pronounced for milk, fish, and beef, but also visible across lamb, chicken, and eggs.

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



Oilseeds, Cooking Oils, Sugar, and Fava Beans

Figure 13 shows that sugar and cooking oil prices remained stable, with only marginal week-to-week fluctuations, supported by high availability and quality (see Figures 15 and 16), indicating continued supply and demand balance. Prices for fava beans were the highest among the group, rose significantly in the first two weeks of May, but declined sharply in the last week. Sesame, and groundnuts prices declined slightly over time, but experienced a slight increase in late May. Sunflower prices were more volatile throughout, rose in early May but dropped again by mid-month, reflecting availability and quality concerns.

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

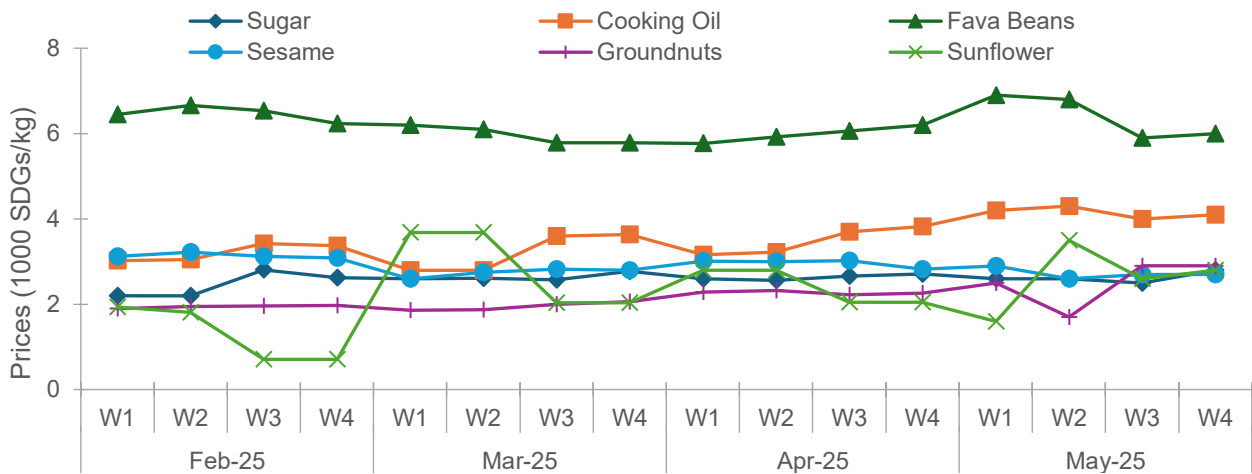


Figure 14 highlights wide price disparities across states. Cooking oil prices are highly variable, with a peak during May in North Darfur state. Prices of sunflower, sesame, fava beans, and groundnuts also show significant spatial variation. In contrast, sugar prices are more stable across both space and time, with the highest prices reported in South Kordofan, North and Central Darfur states.

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

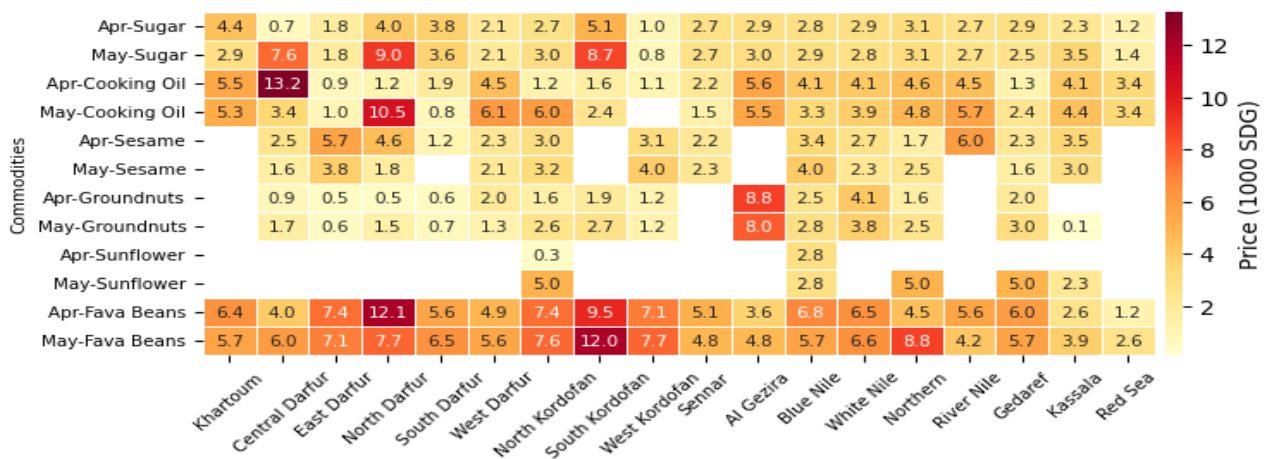


Figure 15 indicates that both sugar and cooking oil maintained consistently medium-to-high levels of availability throughout the period, though there was a gradual decline in the share of traders reporting high availability. Sesame also remained generally well available, despite the brief supply dips. Groundnut availability showed improvement over time but experienced a decline in May. Sunflower faced the most significant supply challenges, with consistently low reports of high availability and persistent indications of low availability and scarcity.

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

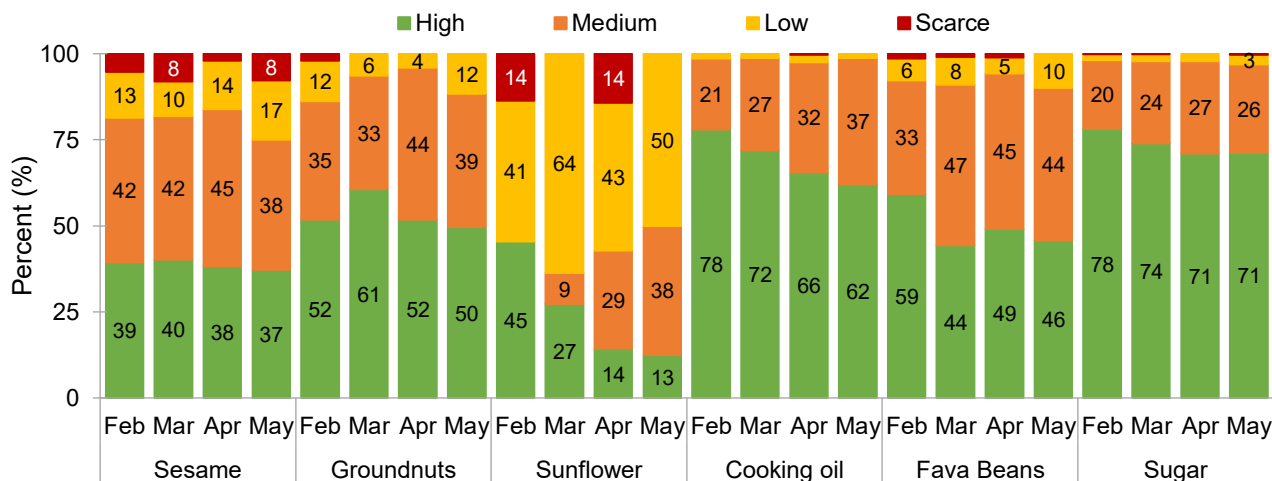
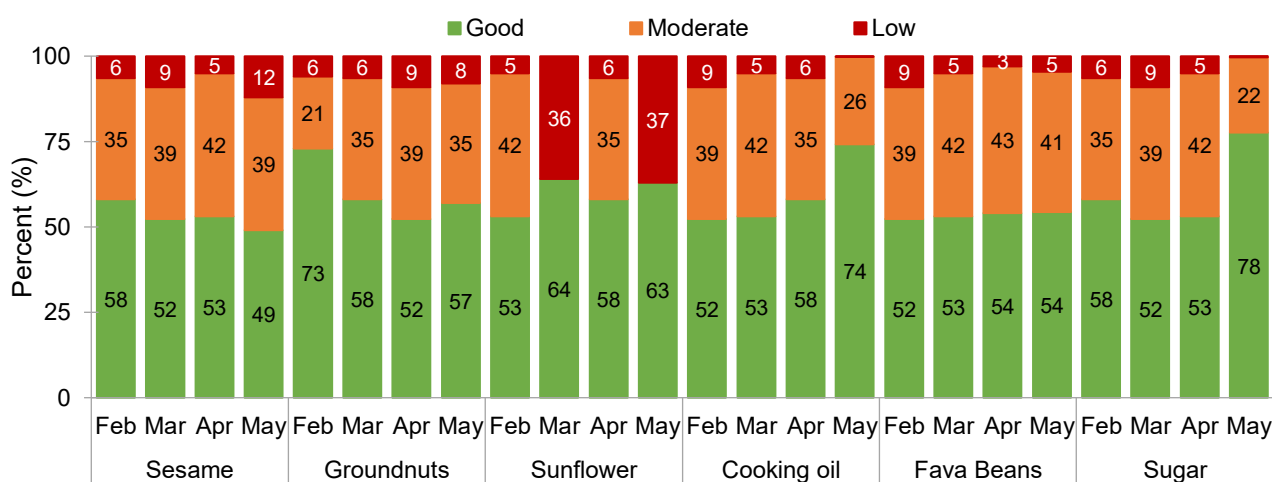


Figure 16 shows stable quality perceptions for fava beans, sesame, and groundnuts, with most traders reporting good to moderate quality. Sunflower quality declined, with low-quality reports peaking in March. Sugar and cooking oil maintained consistently high quality throughout the period.

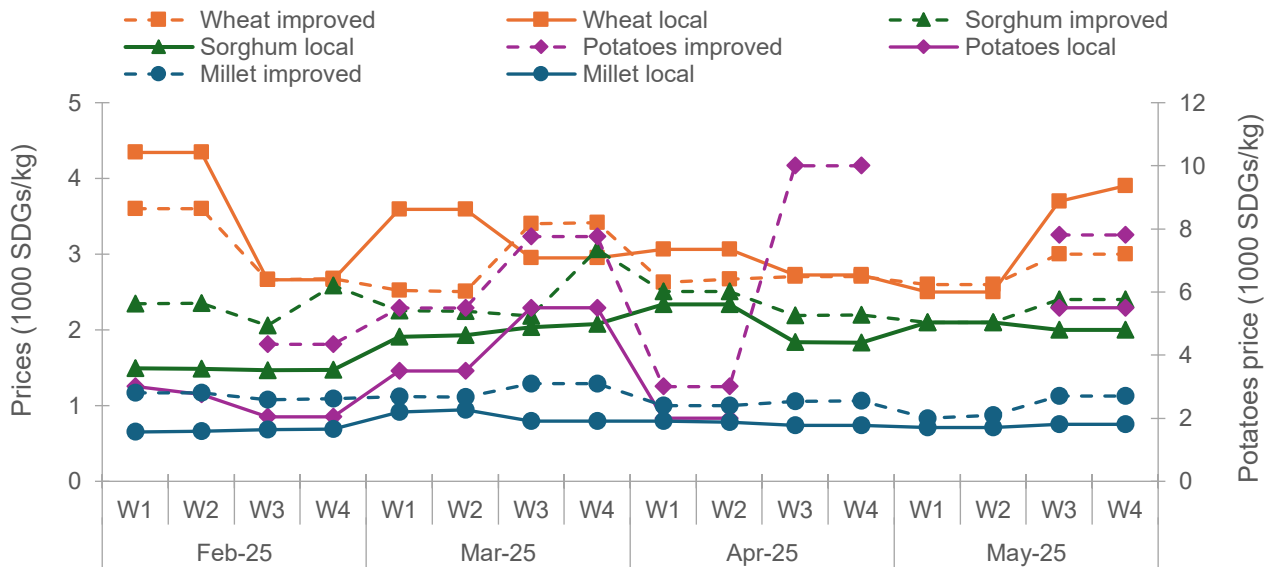
Figure 16: Oilseeds, cooking oils, sugar and fava beans quality scores, February - May 2025



Improved and Local Seeds

Figure 17 shows that prices for both improved and local wheat seeds remained stable through most of the period but rose noticeably in May. Improved sorghum seed prices were flat, while local sorghum saw a moderate increase in May. Improved potato seed prices peaked in March, surged again in late April to the highest levels observed, then declined slightly by end-May. Local potato seed prices spiked in March, dropped sharply in April, and rose slightly toward the end of May. Millet seed prices were the lowest and most stable, with local millet showing only mild fluctuations—a slight rise in March, a dip in April and early May, and a small increase in late May.

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



Fertilizers

Figure 18 shows moderate price fluctuations for Urea and DAP. Urea prices rose from February to March, then declined in April, and then increased again in May. DAP prices remained low and stable from April through May. These trends align with reported changes in availability and quality (Figure 19).

Figure 18: Local fertilizer prices (SDG/Kg), weekly average, February - May 2025

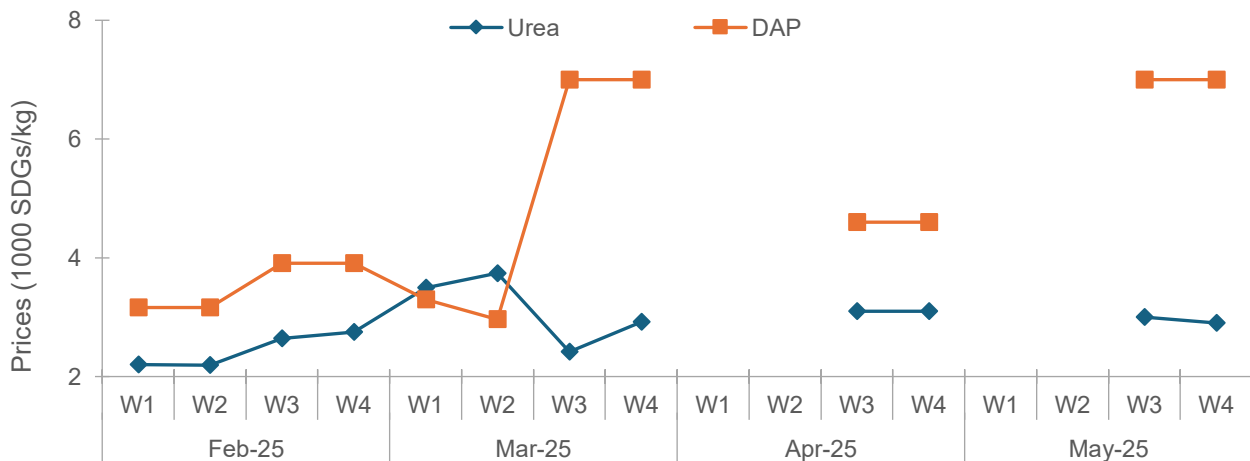
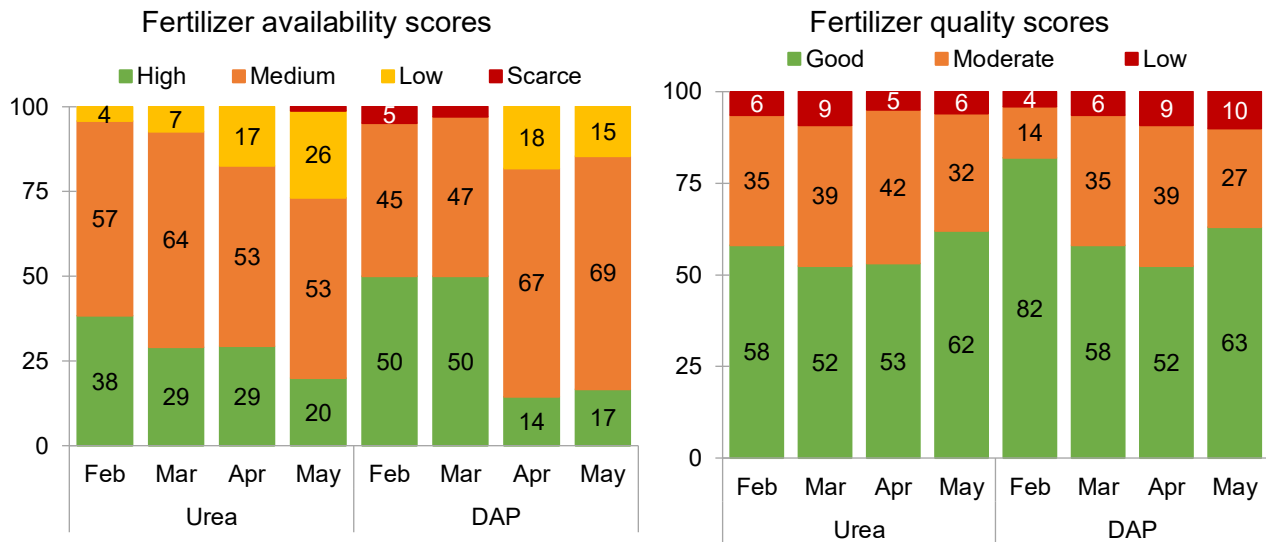


Figure 19 shows a sharp decline in the availability of urea by May. The proportion of traders reporting high availability dropped significantly between February and May, accompanied by a corresponding rise in reports of low availability and scarcity.

For DAP, the share of traders reporting high availability also declined notably during April and May. Perceptions of DAP quality worsened during this period, with only slight improvement observed in May. Similarly, the share of traders rating DAP quality as “high” increased in May.

Figure 19: Fertilizer availability and quality scores, February - May 2025



Diesel and Petrol

Figure 20 shows that diesel prices in the parallel market rose steadily from early April, peaking in mid-May, and remained elevated through the end of the month. In contrast, regular diesel prices were relatively stable, with only a gradual increase over the entire period. Petrol prices in the parallel market followed a similar pattern, rising from mid-April to mid-May before slightly declining in the final week. Meanwhile, regular petrol prices remained relatively flat throughout. Across both fuel types, parallel market prices consistently exceeded regular market prices, reflecting widening price gaps under constrained supply conditions.

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

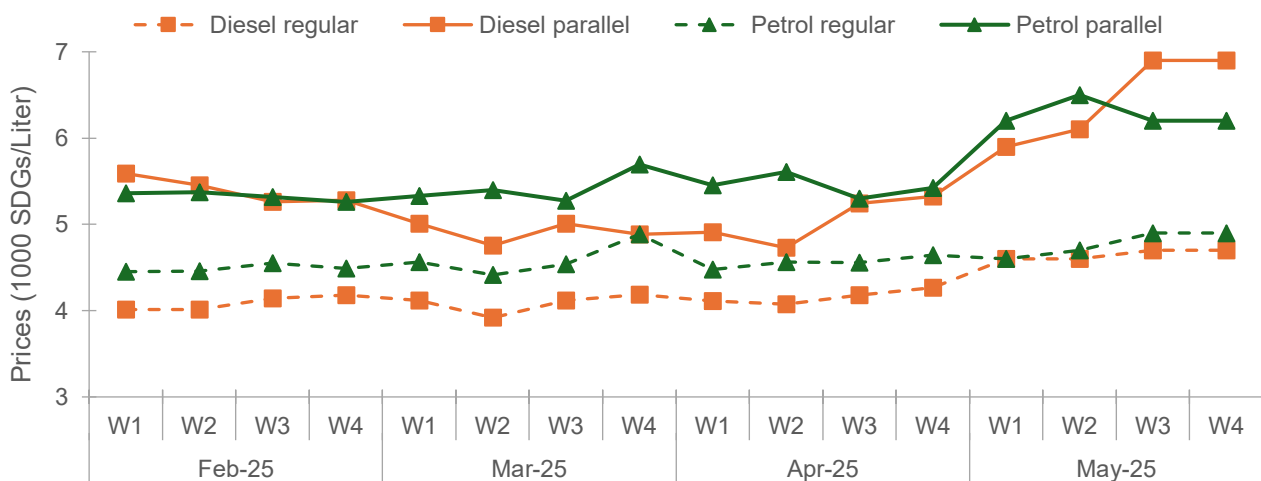


Figure 21 highlights pronounced spatial disparities in fuel prices as of May 2025. Regular diesel prices were highest in Central Darfur and lowest in Gedaref, Northern, and Kassala. Parallel market diesel prices showed even greater variation, with South Kordofan recording the highest prices and Gedaref and Kassala the lowest. Regular petrol was most expensive in South Kordofan and cheapest in Kassala and Gedaref, a pattern mirrored in the parallel market. These differences underscore persistent regional disparities in fuel access and market dynamics.

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

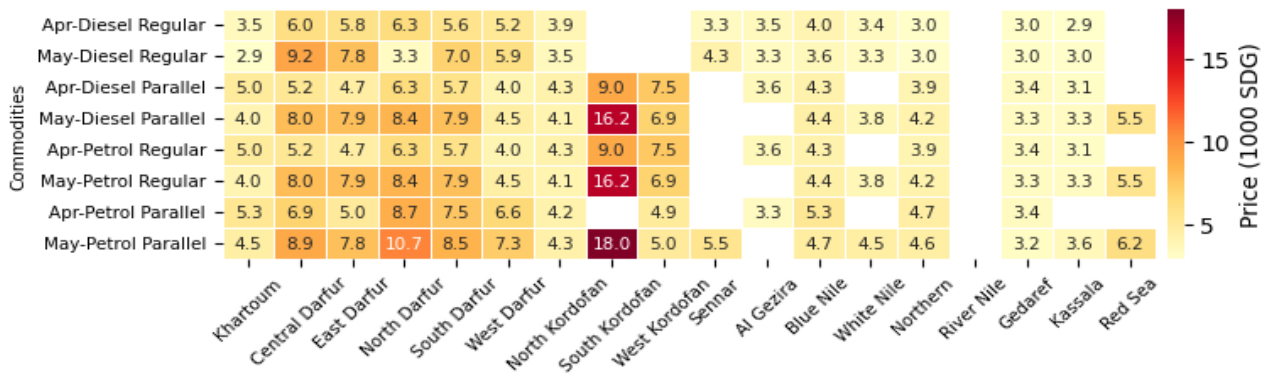
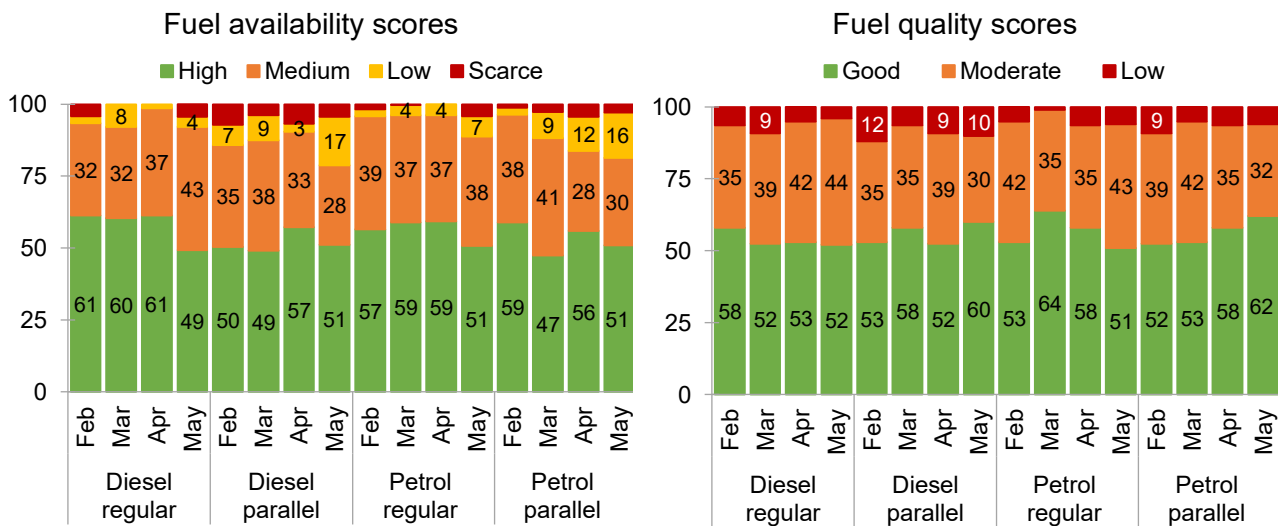


Figure 22 shows that fuel availability in the regular market remained mostly high to medium throughout the period, with slight disruptions in May, especially for diesel. In contrast, parallel market availability fluctuated more and declined modestly in May. Perceptions of fuel quality in the regular market showed a downward trend, with fewer traders reporting high quality over time. Meanwhile, in the parallel market, the share of traders reporting high-quality fuel rose slightly in May.

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



Exchange Rates

Figure 23 shows a consistent gap between the parallel and official exchange rates from February to May 2025. While both rates show a gradual upward trend, the parallel exchange rate remains significantly higher, indicating ongoing pressure on the local currency and strong demand in informal markets. The official rate increases modestly and briefly spikes in mid-May before stabilizing, while the parallel rate rises more sharply toward the end of May.

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

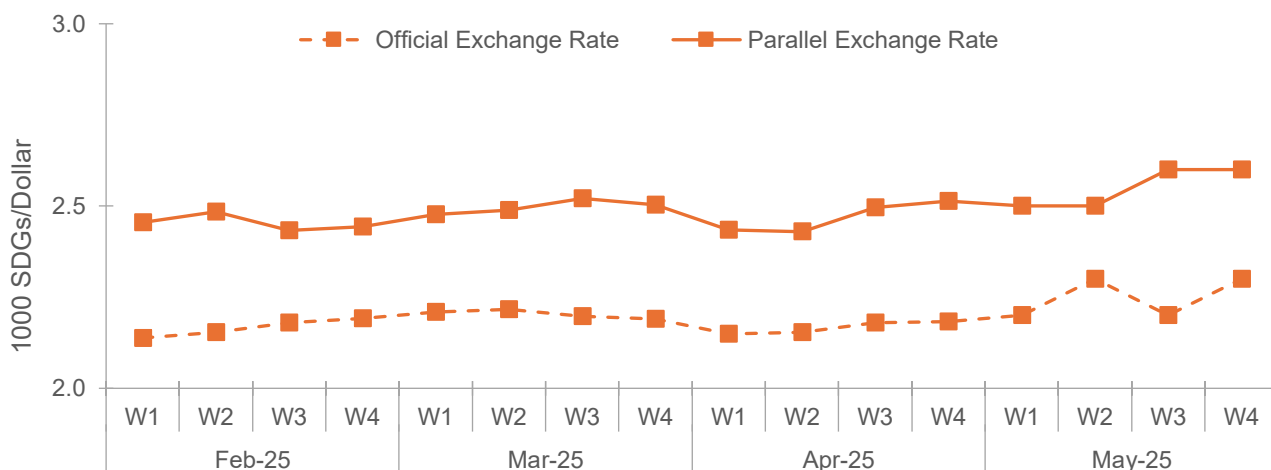
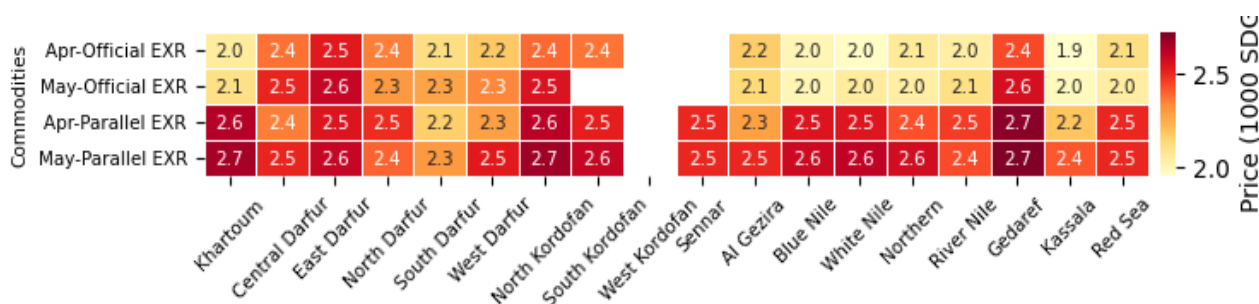


Figure 24 shows persistent spatial differences in exchange rates, with parallel market rates consistently higher than official rates in all states, highlighting continued reliance on informal channels due to limited foreign exchange supply. The highest parallel rates were reported in Khartoum, Gedaref, and North Kordofan, while lower rates appeared in South Darfur and Kassala. Several states saw rising parallel rates in May, indicating increasing pressure on the unofficial market.

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



Market Actors' Perception

Market actors across Sudan's regions continue to report disruption in domestic trade routes, inconsistent and costly operational costs, and continued price fluctuation. Surging prices, reduced purchasing power for non-essential goods continue to dominate market actors' perception and behavior. Increases in fuel prices and intensified power cuts across many regions have impacted trade and storage of commodities, compounded by the increased costs of regulatory (by both state and non-state actors), continue to impose challenges on merchants. Common challenges include:

- ▶ Declining demand for non-essential goods; increased reliance on staple foods.
- ▶ Inflationary and foreign exchange fluctuation pressures on imports and domestic trade.
- ▶ Security risks such as looting and theft along trade routes and within markets.

In conflict-intense regions of Darfur and Kordofan merchants note:

- ▶ Supply is inconsistent from the East, and transport costs are high.
- ▶ Increased reliance on cross-border trade with Chad, and less commonly Libya.
- ▶ Sharp increase in fuel prices and price volatility of commodities.
- ▶ Development of merchant networks for bulk purchasing and transportation to cut costs.
- ▶ Traders face informal fees from non-state actors and rely on costly secure storage.

In relatively safer regions in the East, Central and Northern regions of Sudan, merchants note:

- ▶ Demand is lower due to the return of IDPs to urban areas or states of origin.
- ▶ Scarcity of fuel and increased transportation costs.
- ▶ Frequent power cuts and reduced storage capacity and quality.
- ▶ Price volatility persists without price regulatory mechanisms.
- ▶ High costs of customs, imports, and inter-state fees for domestic trade; with heavy reliance on imports.

In addition to challenges faced, merchants have also identified opportunities in markets and inter- and intra-state trade, namely:

- ▶ Commodity diversification to meet essential needs.
- ▶ Market expansion into rural areas and interstate collaboration among merchants.
- ▶ Emergence of new traders and access to cross-border trade, especially in West Darfur.
- ▶ New markets, merchants, and increased competition, especially in White Nile State.

Merchants' profitability continues to be contingent on four key factors: demand for commodities, trade routes, access to commodities, and conflict intensity. In May, changes in the prices of fuel and power cuts impacted merchants' trade and profitability. Merchants in the Darfur region reported very low profits of 5-10 percent. While in the Kordofan region, and regions in the center and east, the majority of the merchants denoted their inability to assess profits given the inflationary pressures on prices. However, merchants denoted overall decline "low-medium" profits compared to previous months reports.

Regulatory fragmentation persists. In SAF-controlled areas, formal customs and taxes, and market service fees apply, mainly to larger traders at increased costs, while in areas under non-state control, merchants pay irregular (daily or weekly) security fees without formal oversight. This uneven governance contributes to significant disparities in market functionality and merchants' outcomes across regions.

Conclusions

This report presents an overview of price dynamics, availability, and quality of essential commodities from February to May 2025. Cereal prices, particularly for wheat and millet, rose sharply in May, driven by deteriorating availability, while sorghum remained relatively stable. Price and availability patterns varied widely across states, with conflict-affected areas such as Darfur and Kordofan facing the highest levels of volatility. Vegetable markets showed seasonal fluctuations, with tomato and potato prices increasing in May. Meat and animal product prices also rose, especially for lamb and milk, amid signs of declining availability and mixed quality perceptions. Fuel prices showed significant divergence between regular and parallel markets, with the latter experiencing sharp increases, especially in May. Spatial variation in fuel prices and availability underscores persistent access constraints and market fragmentation. Exchange rates followed a similar trend, with the parallel market rate consistently outpacing the official rate, reflecting currency pressures and reliance on informal channels.

Traders' perceptions further confirm mounting operational challenges. Merchants report declining demand for non-essential goods, rising fuel and transport costs, frequent power cuts, and increasing informal fees—particularly in conflict-affected regions. Despite these constraints, some merchants identify emerging opportunities such as cross-border trade and market expansion.

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