

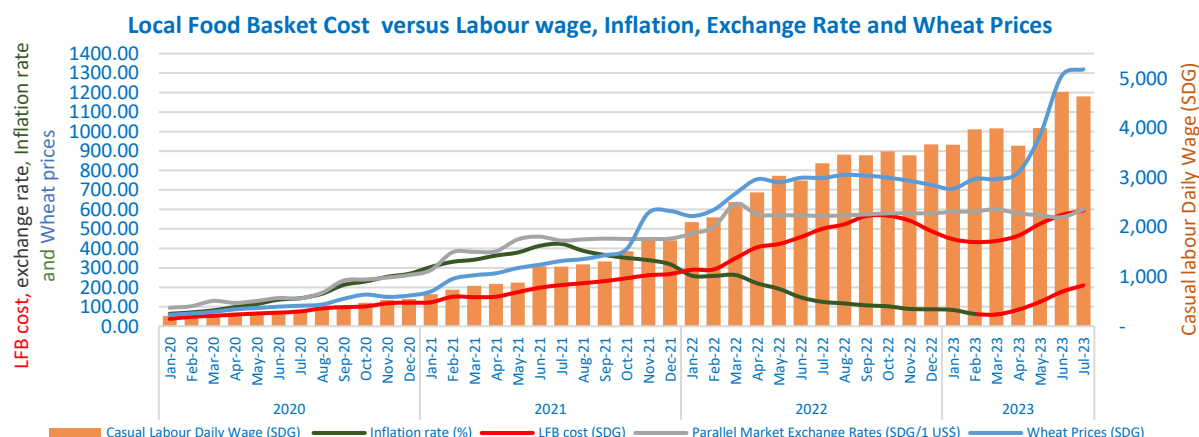
## WFP Market Monitor - Sudan July 2023

- The national average retail price of sorghum was **SDG387.1/1 Kg**, a **decrease of 5.68%** compared to the previous month.
- The national average retail price of wheat flour was **SDG1,319/1 Kg**, an **increase of 8.65%** compared to the previous month.
- The national average retail price of the goat was **SDG35,242/head**, an **increase of 1.01%** compared to the previous month.
- The national average price of groundnut was **SDG23,024/1 kantar**, an **increase of 4.27%** compared to the previous month.
- The average cost of the WFP local food basket was **SDG594.5/1 LFB**, an **increase of 4.04%** compared to the previous month.

### Food Security Outlook

The WFP local food basket cost, wheat prices, inflation rates, and casual-labour daily wages show an increase during July and June 2023. The foreign exchange rate showed a significant increase during July, while it slightly declined in May and June 2023 compared to the previous months (March/April). In July 2023, the average parallel exchange rate increased to **600SDG/1US\$** in July, while the commercial banks' average rate increased to around **580SDG/1US\$** (due to increasing demand for foreign currency to import inputs and goods). The inflation rates were not issued for the last 5 months of 2023, but with the skyrocketing prices of goods and services, it is estimated to exceed **200 percent** by July. The WFP local food basket cost (LFB) increased to **SDG594.5** in July compared to **SDG571.4** in June, which is an increase of **4.04 percent**. The LFB cost increased by **18.78 percent** compared to the same month of the previous year (**SDG500.5**). The average daily wage rate of casual labor was slightly increased by **4.0 percent** compared to June 2023, (increased from **SDG5,403** to **SDG5,618**), while it was higher by **71 percent** compared to the month of the previous year.

If these circumstances continue, it is expected that there will be a severe shortage in the supply of food and other essential commodities, which will complicate the situation, and thus the prices will increase progressively, and food security for the millions of Sudanese people will be at very high risk.



Note: The inflation rates from March to July 2023 are estimated by the author, no inflation figures issued by CBS since February 2023

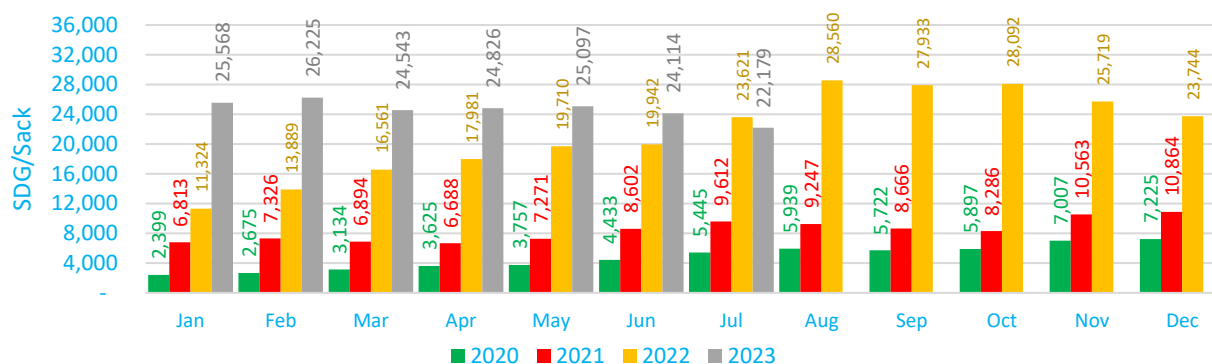
## Prices of Basic Food Items and WFP Local Food Basket Cost

Commodity	Unit of Measurement	Current	Previous month		1 year before	
		SDG	SDG	% Change	SDG	% Change
Sorghum	KG	387.1	410.4	↓ -5.68%	360.9	↑ 7.26%
Wheat flour	KG	1,319.0	1,214.0	↑ 8.65%	762.0	↑ 73.10%
Goat	Head	35,242	34,891	↑ 1.01%	24,119	↑ 46.12%
Groundnut	Sack (45 KG)	23,024	22,082	↑ 4.27%	14,785	↑ 55.73%
Local Food Basket	Unit	594.5	571.4	↑ 4.04%	500.5	↑ 18.78%

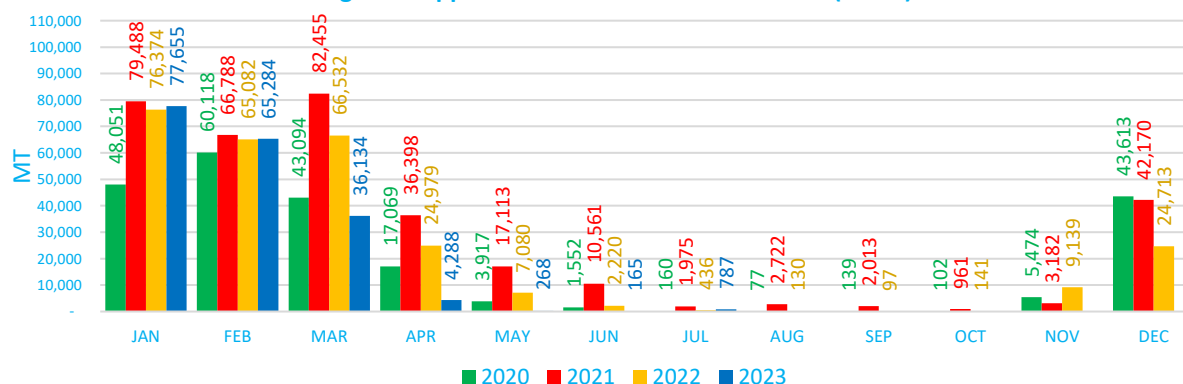
## Sorghum Prices and Supplies in AlGadarif Auction Market

- In **July 2023**, the wholesale price of sorghum recorded in the Al-Gadarif Auction Market was **SDG22,179/90Kg sack**, which is a decrease of **8.0 percent** compared to the previous month and below the same period of the previous year by **6.1 percent**.
- The total supply of sorghum to the AlGadarif Auction Market during **July 2023** increased to **787MT** compared to **165MT** in the previous month, while it was **80 percent** above the quantity supplied during the same period of the previous year (**436MT**).

Sorghum Price in ElGadarif Auction Market



Sorghum Supplies in Al-Gadarif Auction Market (in MT)



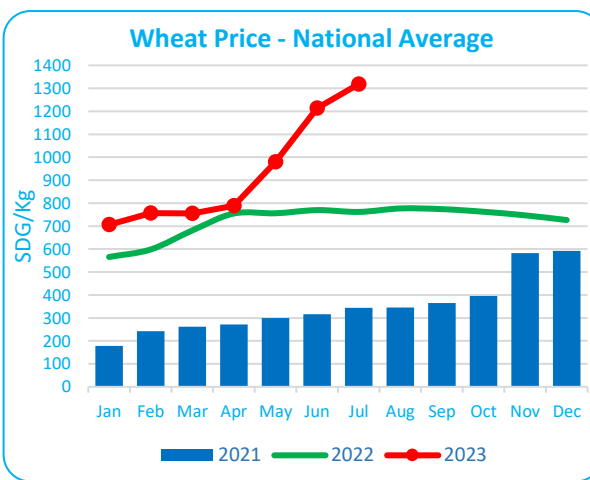
## Commodities Price in WFP Areas



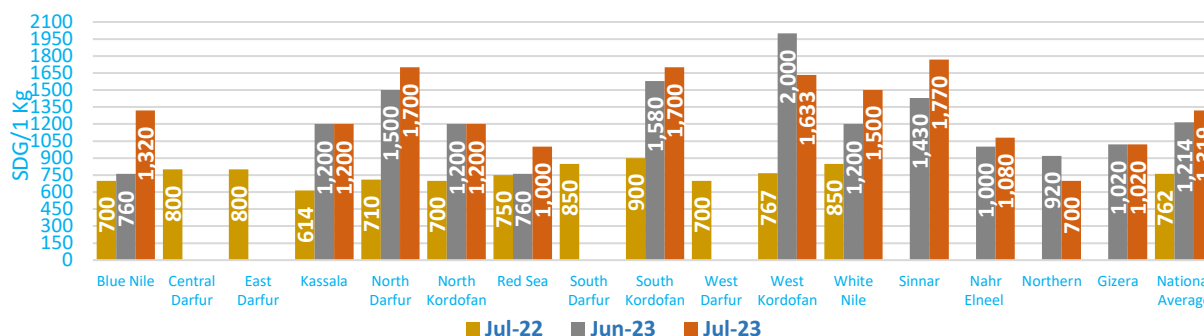
### Wheat Flour

#### National Average

In July 2023, the average retail price of wheat flour sharply increased to **1,319 SDG per 1 kg**, which is an increase of **8.65 percent** compared to the previous month. This is mainly attributed to the interruption of wheat imports and the stoppage of several wheat mills in Khartoum and the high cost of transportation. The prices of wheat are expected to increase during the coming months due to a sharp increase in the exchange rate during the last month. As Sudan imports around **75.0 percent** of the required wheat, this will create a high risk to the food security of more than **30.0 percent** of the Sudanese population on wheat as the main source of cereal. The average retail price of wheat was **73.1 percent** higher than in the same month of the previous year.



#### By States



During July, the retail price of wheat flour increased in **7** out of **12** states compared to the previous month. It sharply increased in Blue Nile (**73.7 percent**), Red Sea (**31.6 percent**), White Nile (**25.0 percent**), Sinnar (**23.0 percent**), North Darfur (**13.3 percent**) and significantly increased in Nahr El-Neel (**8.0 percent**) and South Kordofan (**7.6 percent**). It sharply decreased in the Northern state (**23.9 percent**) and West Kordofan (**18.4 percent**), while it remained stable in the North Kordofan, Kassala, and Gizera states.

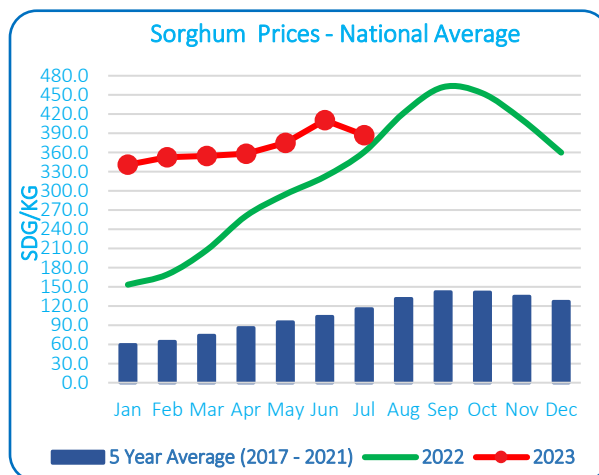
Compared to **July 2022**, the highest increase in the retail price of wheat flour was recorded in North Darfur, which increased by **139 percent**, followed by West Kordofan where it increased by **113 percent**, while the Red Sea showed the lowest increment (**33 percent**).



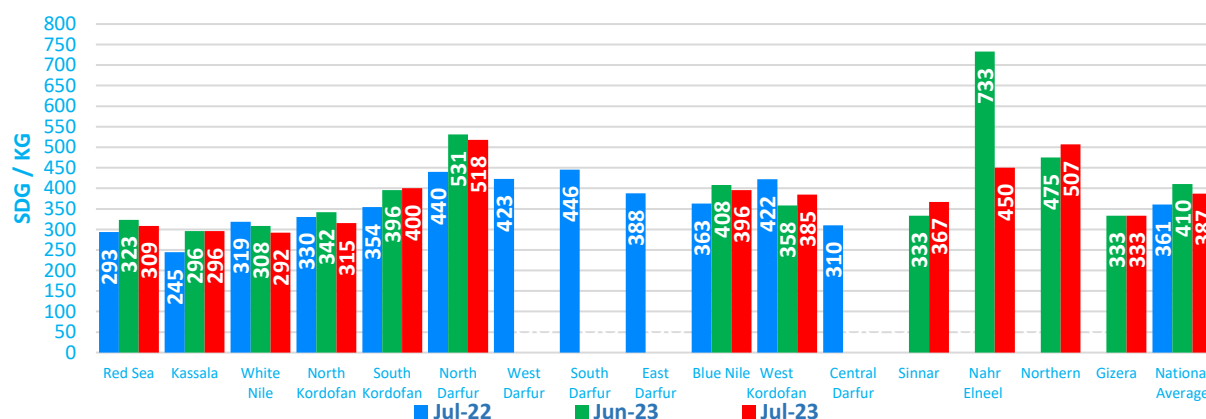
## Sorghum

### National Average

In July 2023, the national average retail price of sorghum was **387.1 SDG/Kg**, which is a decrease of **5.7 percent** compared to **June 2023**. This decrease was due to the high supply from the last summer crop as many farmers need to finance the current agricultural season as many banks are not financing the farmers due to interruptions in their banking systems. The average retail price of sorghum was higher by **7.3 percent** compared to the same period of the previous year. This is mainly attributed to the increase in the cost of production compared to the previous years. The average retail price of sorghum was higher by **236 percent** than the average for the past five years of July.



### By States



The retail price of sorghum decreased in **6** out of **12** states compared to the previous month. It sharply decreased in Nahr Elneel (**39.0 percent**) while it decreased slightly in North Kordofan (**7.7 percent**), White Nile (**5.4 percent**), Red Sea (**4.6 percent**), Blue Nile (**3.1 percent**), and North Darfur (**2.6 percent**). It decreased in Sinnar (**10.0 percent**), West Kordofan (**7.3 percent**), the Northern state (**6.7 percent**), and South Kordofan (**1.1 percent**). It remained stable in Kassala and Gizera states.

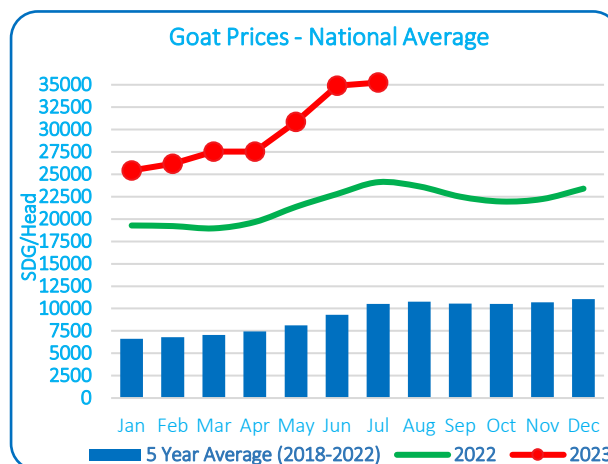
Compared to the same period of the previous year, the highest increase in the retail price of sorghum was recorded in Kassala (**21.0 percent**), followed by North Darfur (**17.7 percent**) while White Nile showed a decrease in West Kordofan, White Nile, and North Kordofan (see the chart in Annex 1 on page 8). Sorghum prices were higher by **169** to **288 percent** in eight states compared to the average of the past five years of July.



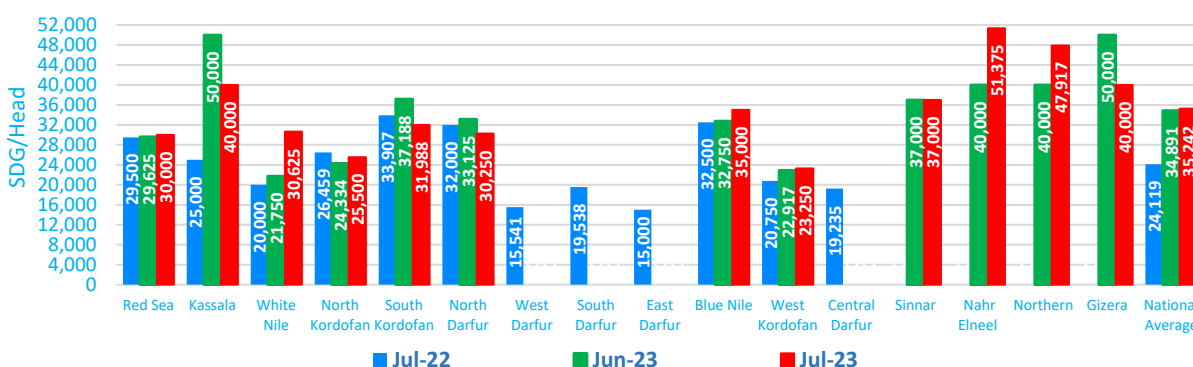
## Goat

### National Average

In July 2023, the average retail price of goat increased to **35,242 SDG per head**, which is a slight increase of **1.01 percent** compared to the previous month. This slight increase is due to low demand from the local markets due to the diminishing purchasing power of the majority of the Sudanese population and the decline in the demand for imports due to the ongoing war. The average retail price of goats increased by **46.1 percent** compared to the same month of the previous year. This is mainly attributed to the high costs of production, such as supplementary feedings, medication, etc. The average retail price of the goat was higher by **235 percent** compared to the five years average of July.



### By States



During July, the retail price for goats increased in **7 states** and decreased in **4 states** compared to the previous month. It sharply increased in White Nile (**41.0 percent**), Nahr ElNeel (**28.0 percent**), Northern (**20.0 percent**), and slightly increased Blue Nile (**7.0 percent**), North Kordofan (**5.0 percent**), West Kordofan (**1.0 percent**) and Red Sea (**1.0 percent**). It decreased in Kassala (**20.0 percent**), Gizera (**20.0 percent**), West Kordofan (**14.0 percent**), and North Darfur (**9.0 percent**). It has remained stable in Sinnar state.

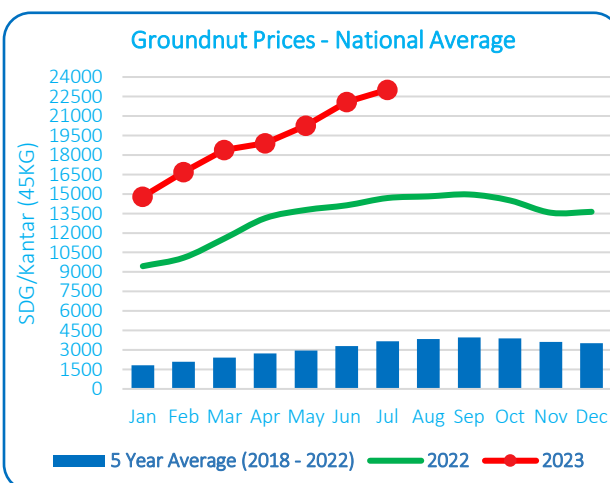
The highest increase in the retail goat prices compared to the same month of the previous year was recorded in Kassala (**60.0 percent**); while it decreased in South Kordofan, North Darfur, and North Kordofan. Goat prices increased by **120 to 262 percent** in different states compared to the five years average of July.



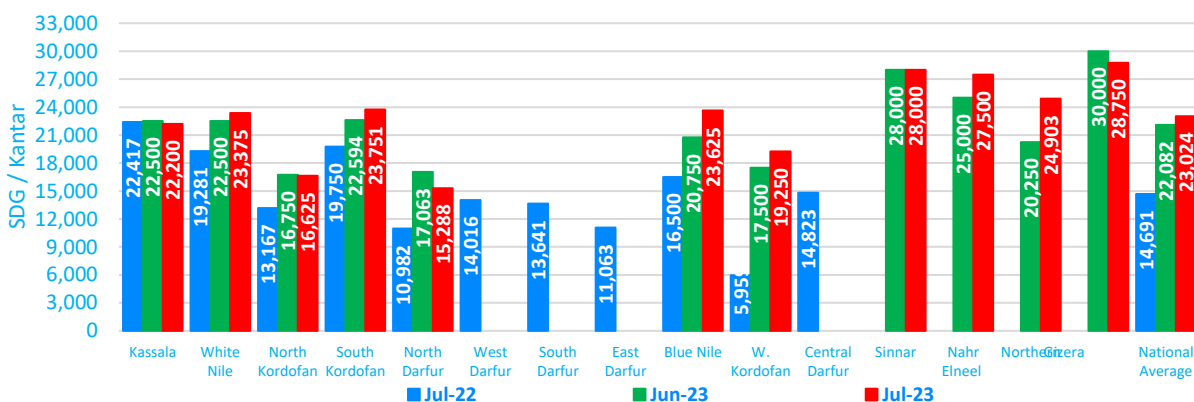
## Groundnuts

National Average~

In July 2023, the average retail price of raw groundnut was **23,024 SDG per Kantar**, which is an increase of **4.27 percent** compared to the previous month. This increase is attributed to the increasing demand from the local oil industry and the disruption of the oil and oilseeds imports due to the ongoing war. The average retail price of groundnut was higher by **55.7 percent** compared to the same month of the previous year. This increase is mainly attributed to the high costs of production during the last two seasons. The national average price of groundnut was higher by **528 percent** compared to the 5 years average of July.



### By States



Groundnut retail prices increased in **6** out of **12** states compared to the previous month. It sharply increased in the Northern state (**23.0 percent**), Blue Nile (**13.9 percent**), Nahr Elneel (**10.0 percent**), and West Kordofan (**10.0 percent**), while it slightly increased in South Kordofan (**5.1 percent**) and White Nile (**5.1 percent**). It remained stable in the Red Sea and Sinnar states.

In **July 2023**, the largest increase in the groundnut price compared to the same period of the previous year was recorded in West Kordofan (**175 percent**) while Kassala state showed a decrease of **6 percent** (see the chart in Annex 1 on page 8). Groundnut prices have shown a sharp increase of **358 to 545 percent** in the states compared to the five years average of July.

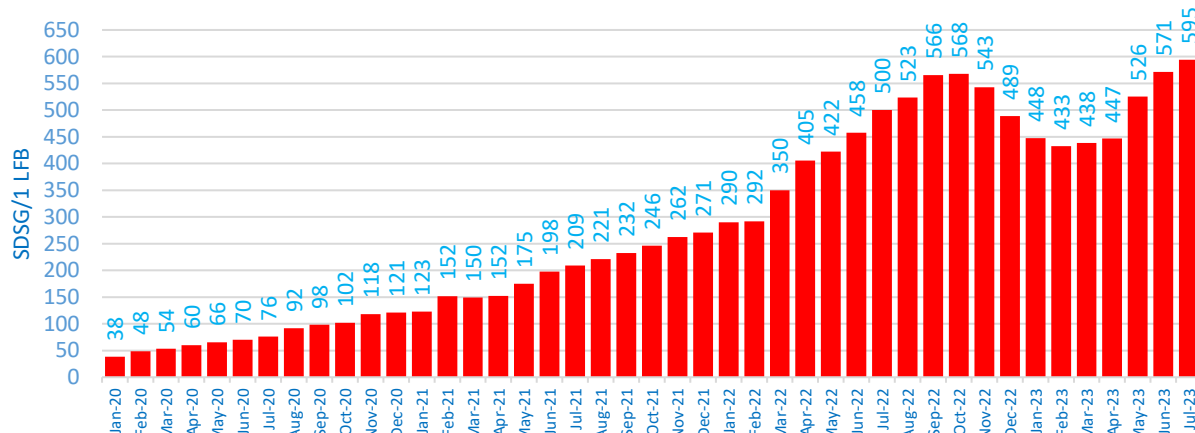


## Cost of WFP Local Food Basket (LFB)

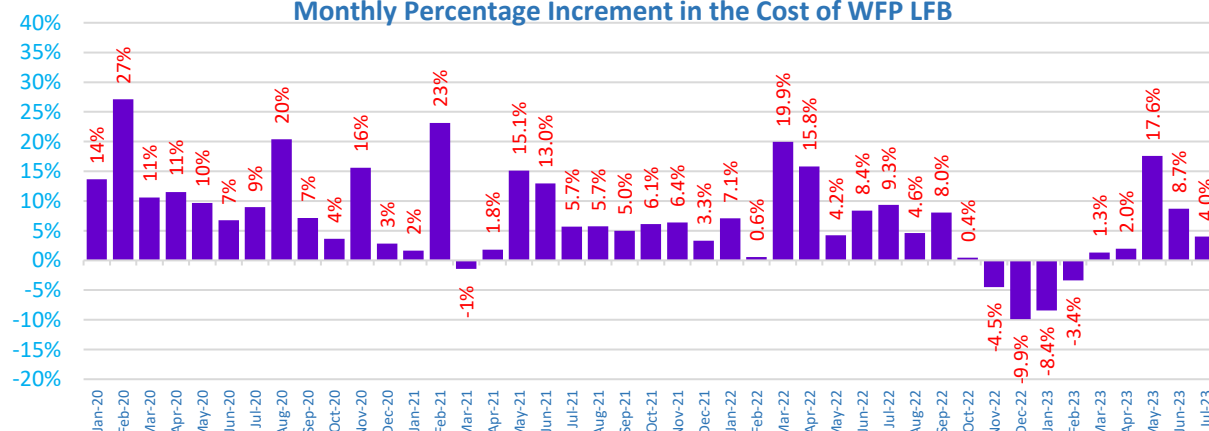
Note: The cost of the food basket was calculated from the prices collected from the markets of 12 states due to the ongoing war

- In **July 2023**, the average cost of the WFP local food basket (LFB) was **594.5** Sudanese pounds/1 unit, an increase of **4.04 percent** compared to the previous month. The cost of the basket showed an increase of **18.78 percent** compared to the same month of the previous year.
- In **July 2023**, the highest cost of the **WFP local food basket** was recorded in West Kordofan (**SDG686 per/unit**) followed by North Darfur and Northern states, **SDG676 and SDG655**, respectively. The lowest **WFP LFB** cost was recorded in North Kordofan (**SDG480**).

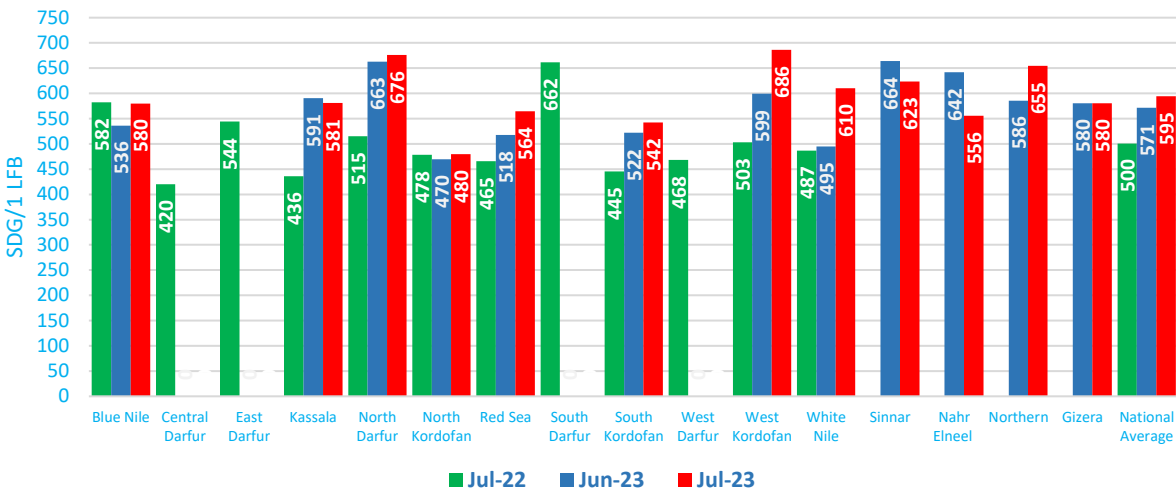
WFP Local Food Basket Cost National Average



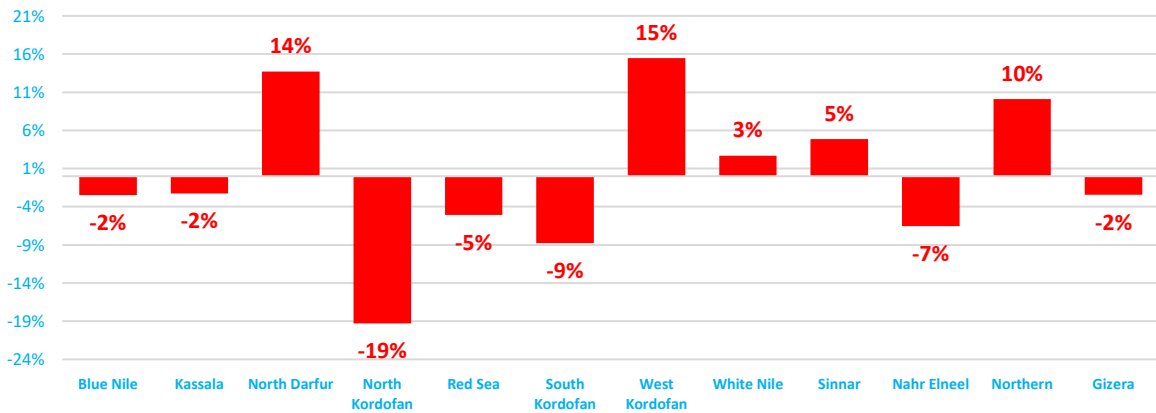
Monthly Percentage Increment in the Cost of WFP LFB



WFP Local Food Basket Cost - by State



Percentage Variation of the Local Food Basket Cost from National Average - By state



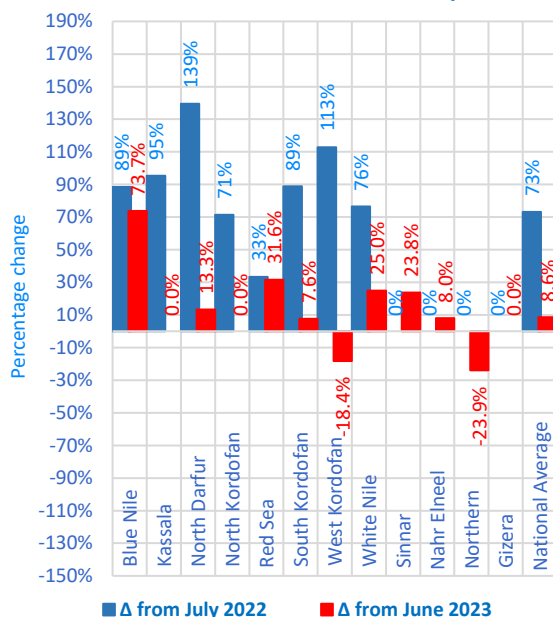


## Annexes

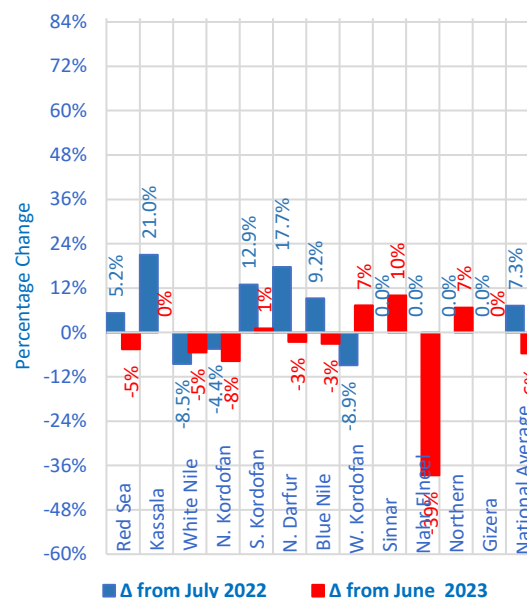
### Annex 1:

### The Percentage Change of Wheat, Sorghum, Goat, and Groundnut Prices Compared to the June 2023 and July 2022

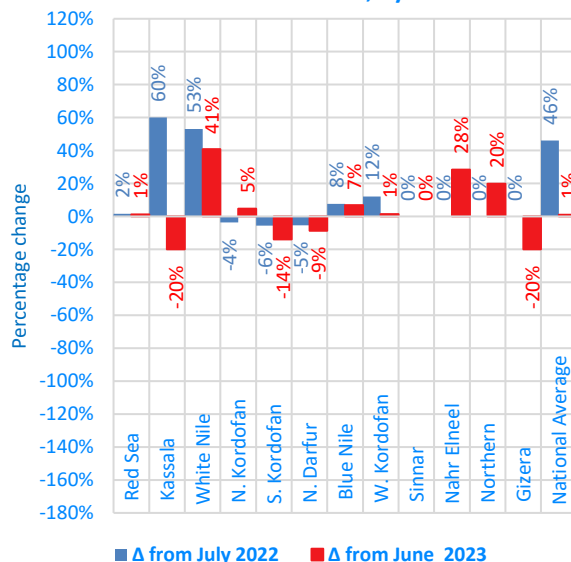
Variation of Wheat flour Prices, by state



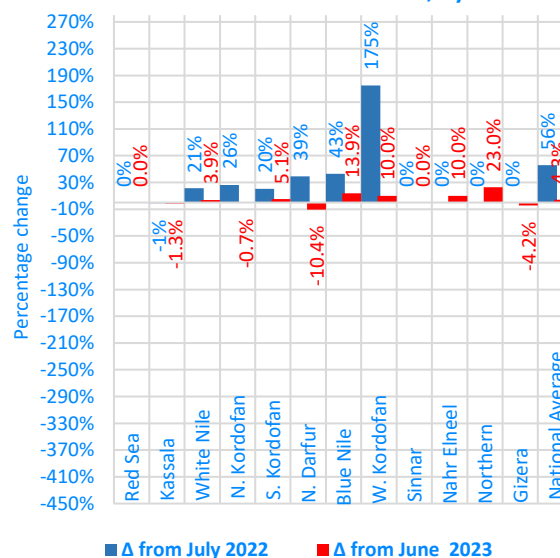
Variation of Sorghum Prices, by state



Variation of Goat Prices, by states



Variation of Groundnut Prices, by states



## Annex 2:

### Change in the Retail Prices of the Cash-Based Transfer (CBT) Food Items

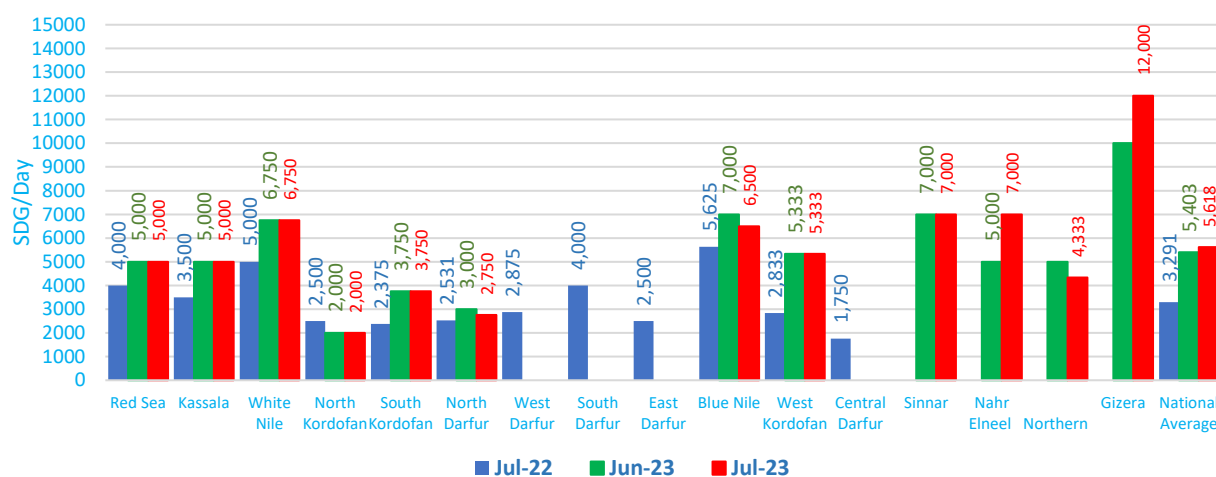
Commodity	Unit	Jul-23	Jun-23	Jul-22	Change of retail price compare to previous month	Change of retail prices compare to same month - last year
Sorghum	SDG/Kg	385	403	392	↓ -4.5%	↓ -1.7%
Onion	SDG/Kg	518	472	440	↑ 9.7%	↑ 17.5%
Vegetable Oil (groundnut)	SDG/litre	2,703	2,220	1,459	↑ 21.8%	↑ 85.2%
Cow Meat	SDG/Kg	3,508	3,285	2,576	↑ 6.8%	↑ 36.2%
Goat_Sheep Meat	SDG/Kg	4,673	4,545	3,036	↑ 2.8%	↑ 53.9%
Powder Milk	SDG/Kg	7,559	6,837	5,838	↑ 10.6%	↑ 29.5%
Dry Tomatoes	SDG/Kg	2,119	2,329	2,551	↓ -9.0%	↓ -16.9%
Sugar	SDG/Kg	1,119	1,063	694	↑ 5.3%	↑ 61.4%
Pulses - Fabi bean	SDG/Kg	1,731	1,636	1,323	↑ 5.8%	↑ 30.8%
Iodized salt	SDG/Kg	527	474	404	↑ 11.2%	↑ 30.4%
Wheat Flour	SDG/Kg	1,319	1,232	762	↑ 7.0%	↑ 73.1%



Increase if % > + 2  
Stable if % between -2 and +2  
Decrease if % < - 2

## Annex 3:

### Casual Labor Wage - Daily Rate (SDG/Day)



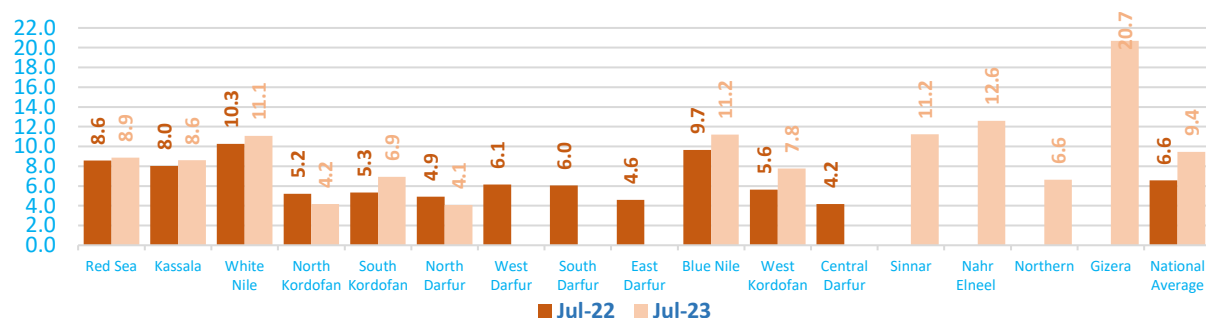
## Annex 4:

### Terms of Trade (TOT)

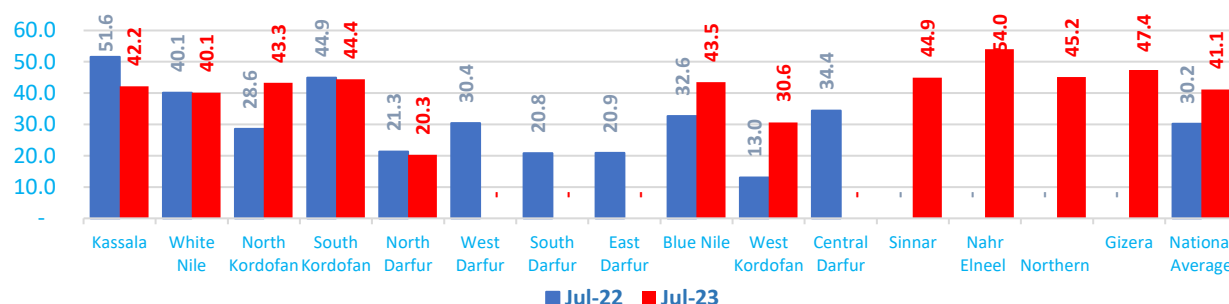
In **July 2023**, compared to the same period of the previous year (see charts below):

- There was an improvement in the terms of trade (TOT) between the WFP local food basket and casual labor wage in **six** states, while it decreased in **two** states.
- The TOT between the WEP LFB and one kantar of groundnut improved in **three** states while it deteriorated in **two** states and remained stable in **one** state.
- The TOT between WFP LFB and one middle-sized goat has improved in **two** states and deteriorated in **six** states.

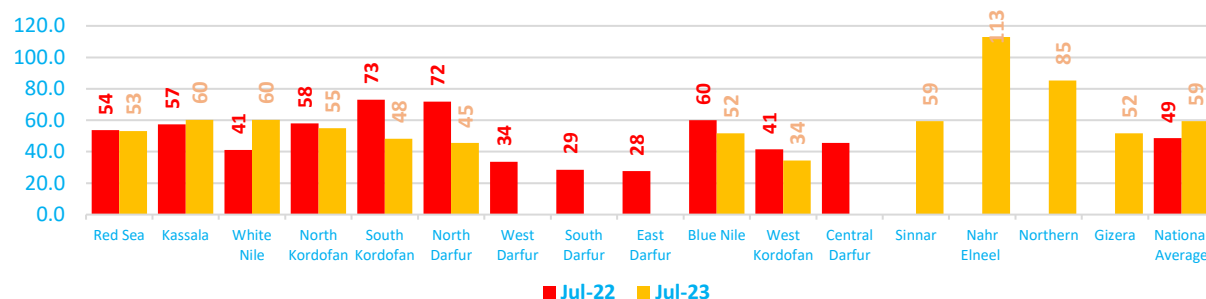
#### Casual Labor Wage - Daily Rate versus WFP LFB units



#### Groundnut (1 sack of 45Kg) versus WFP LFB units



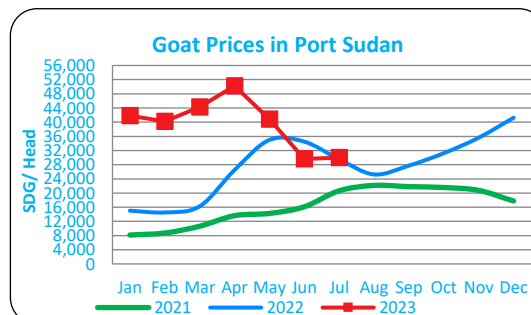
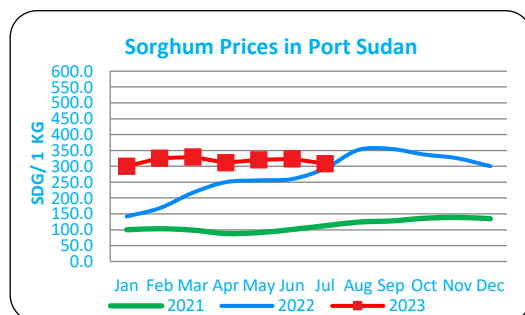
#### Goat (one medium size) versus WFP LFB units



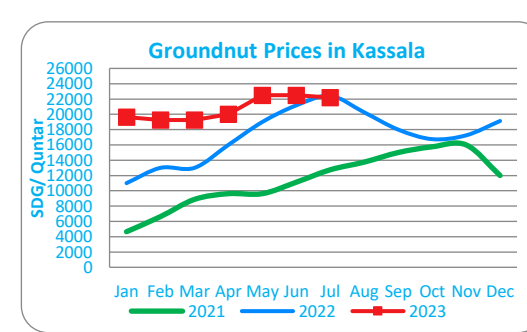
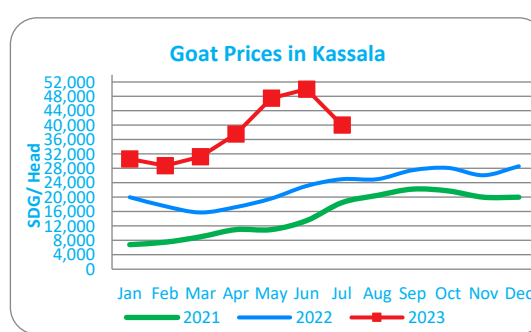
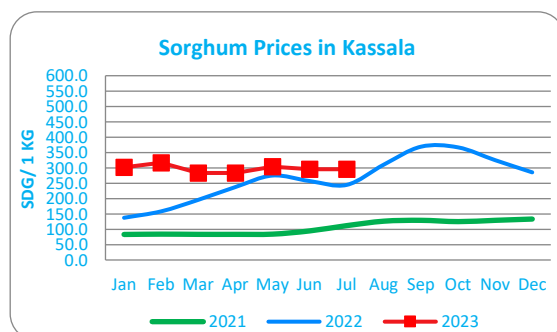
## Annex 5:

### Sorghum, Goat, and Groundnut Prices Trends by State

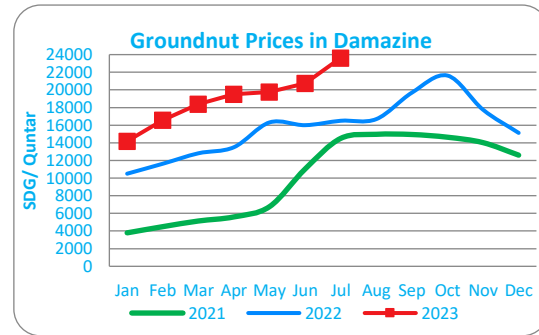
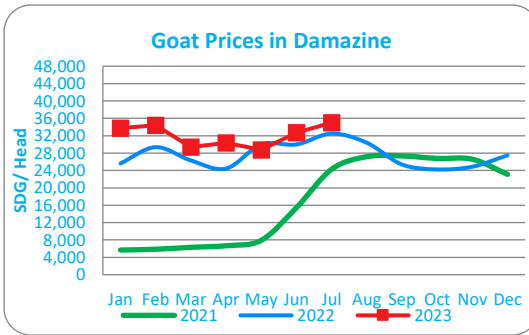
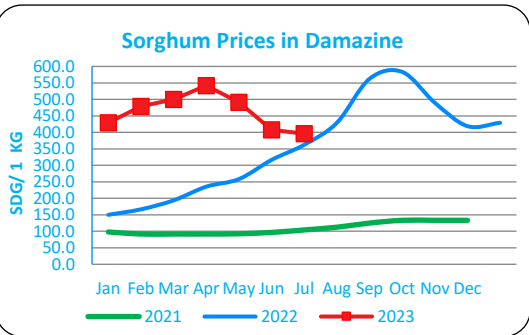
#### Red Sea



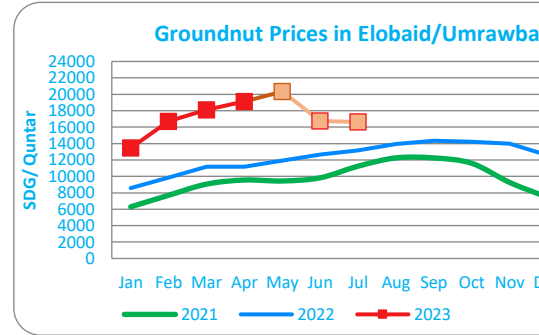
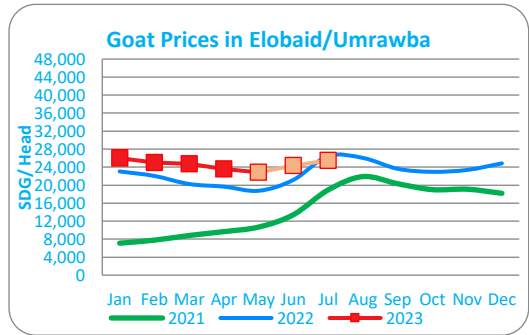
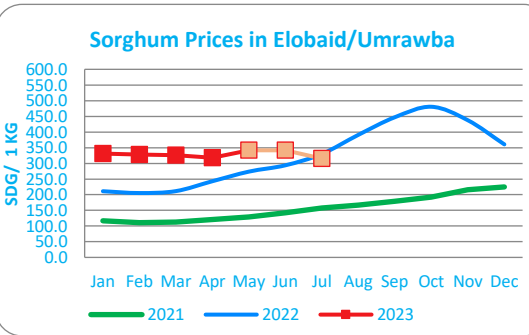
#### Kassala



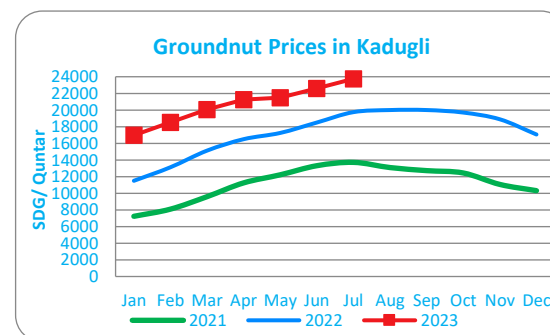
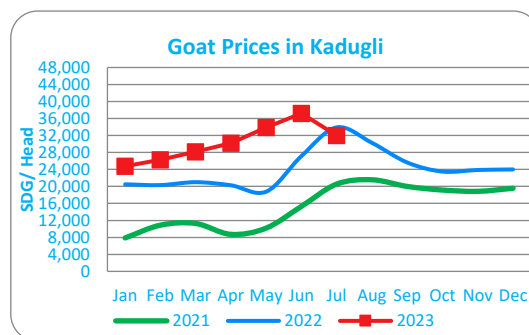
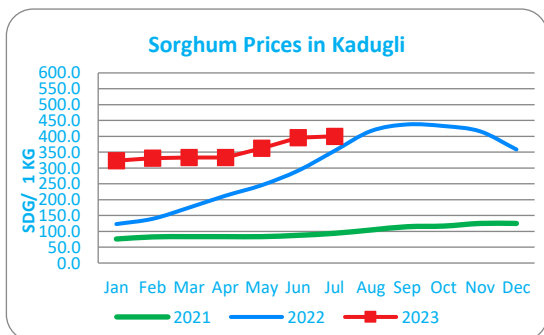
## Blue Nile



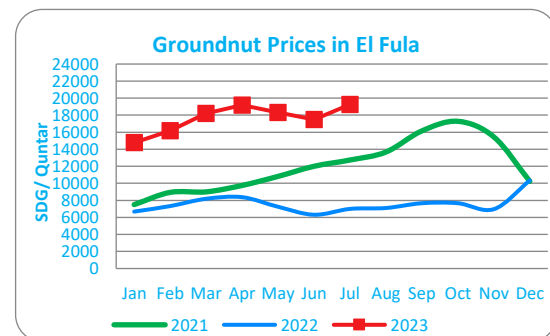
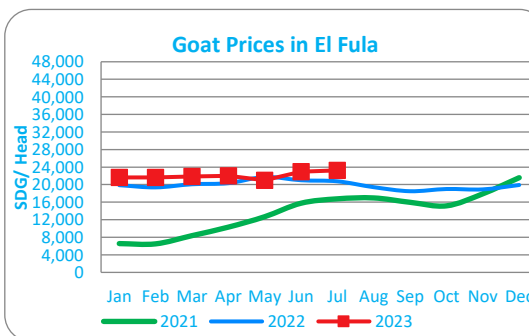
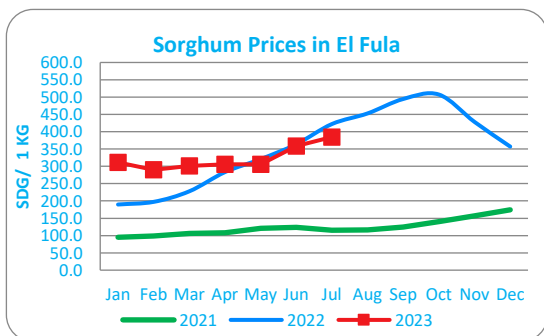
## North Kordofan



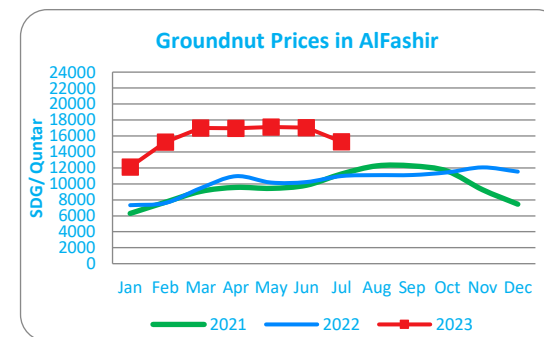
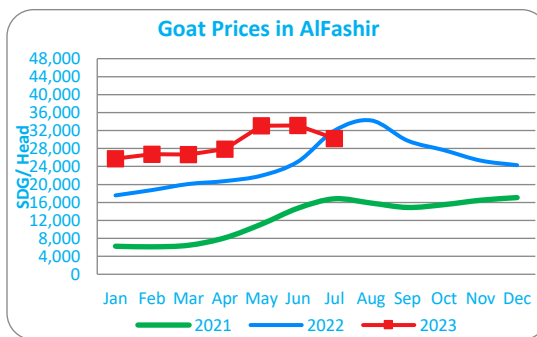
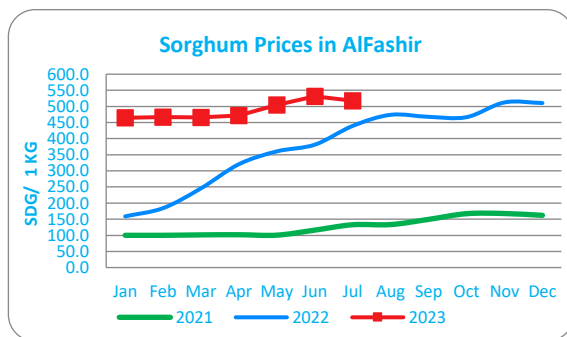
## South Kordofan



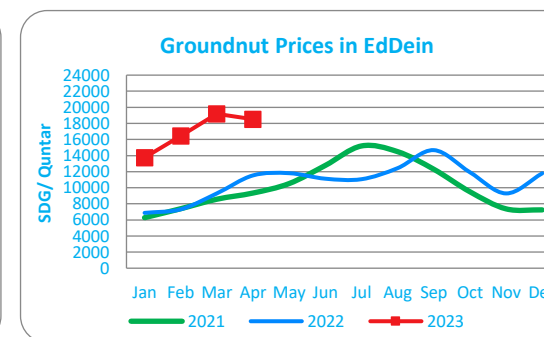
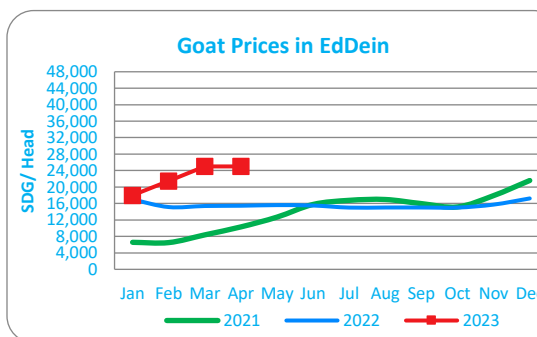
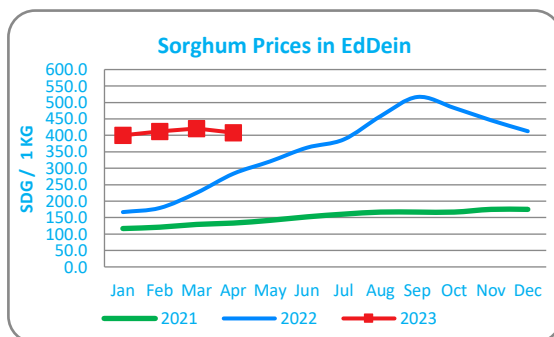
## West Kordofan



## North Darfur

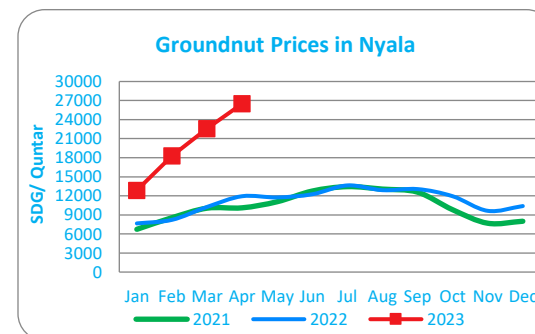
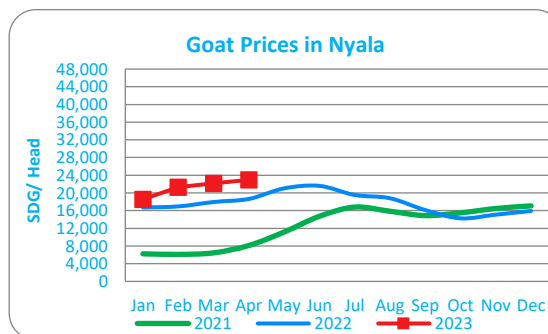
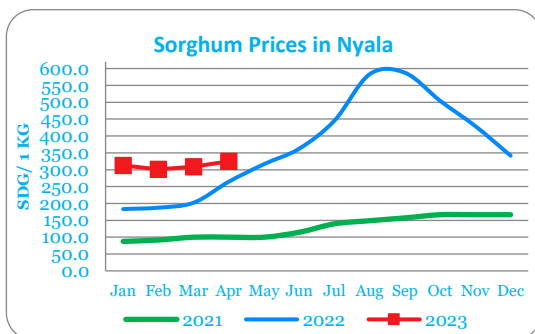


## East Darfur

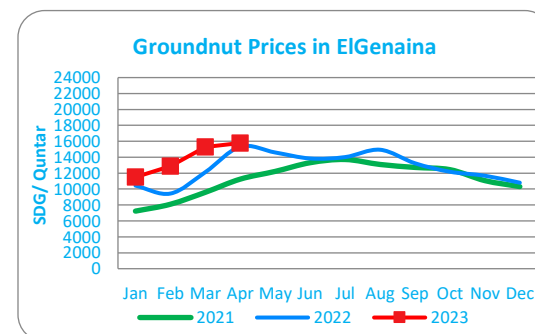
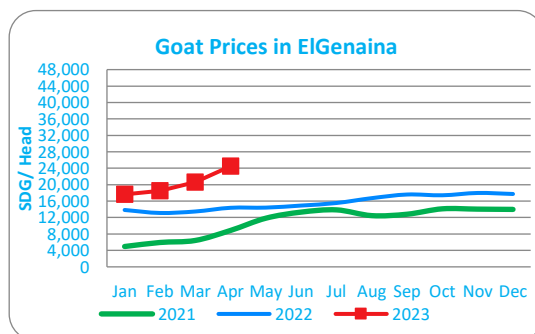
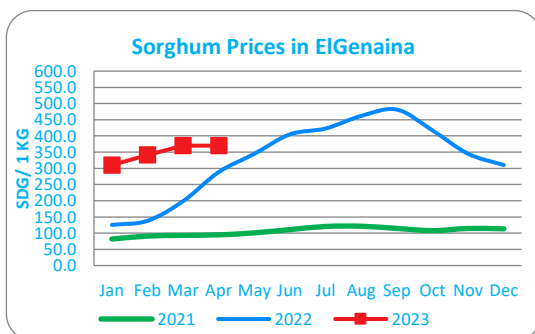




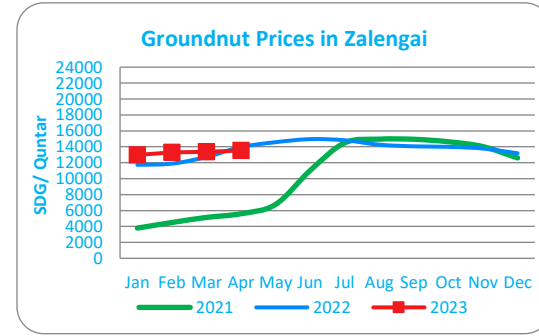
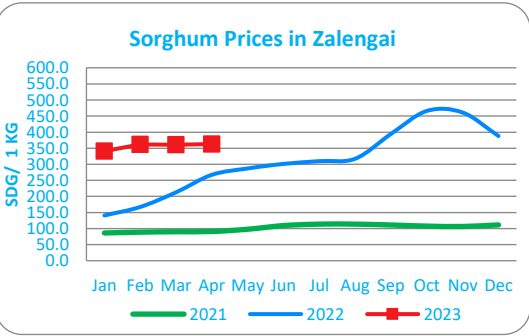
## South Darfur



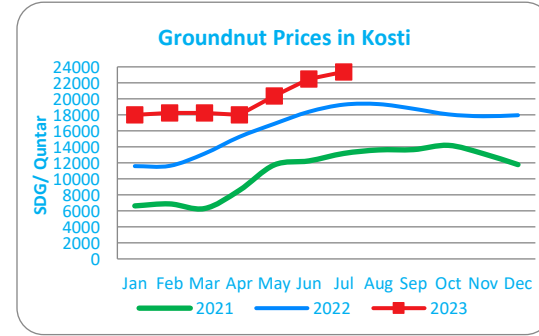
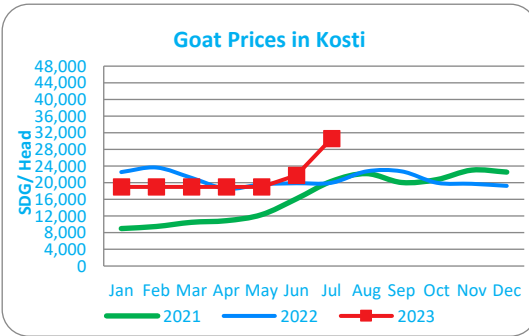
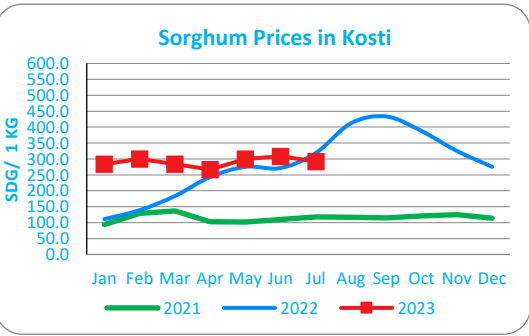
## West Darfur



## Central Darfur



## White Nile



## National Average

