

## WFP Market Monitor - Sudan

### December 2023

- The average retail price of sorghum nationwide experienced a noteworthy upturn, reaching **SDG 463 per 1 kg**. This marked a **6.05%** increase from the preceding month and a substantial **32.59%** surge from **Q1-2023**, before the conflict emerged.
- Wheat flour's average national retail price rose to **SDG 1,494 per 1 kg**, reflecting a significant **7.17%** increase from the previous month and a notable **102.1%** surge from **Q-2023**, pre-conflict.
- The national average retail price of goats climbed to **SDG 44,317 per head**, signifying a considerable **13.98%** increase from the prior month and a substantial **68.07%** rise from **Q1-2023**, before the conflict began.
- Groundnut's national average price was **SDG 25,964 per kantar**, indicating a **9.39%** decrease from the previous month and a remarkable **56.13%** increase from **Q1-2023**, pre-conflict.
- The average cost of the local food basket (LFB) reached **SDG 827 per 1 LFB**, reflecting a **9.6%** increase from the preceding month and a substantial **88.29%** rise from **Q1-2023**, pre-conflict.
- **In December**, the average foreign exchange rate experienced a notable devaluation of **4.8%**, dropping to approximately **1,100 SDG/1US\$**. This contrasted with the **November 2023** rate of **1,050 SDG/1US\$** and represented an **86.6%** devaluation compared to **Q1-2023**.

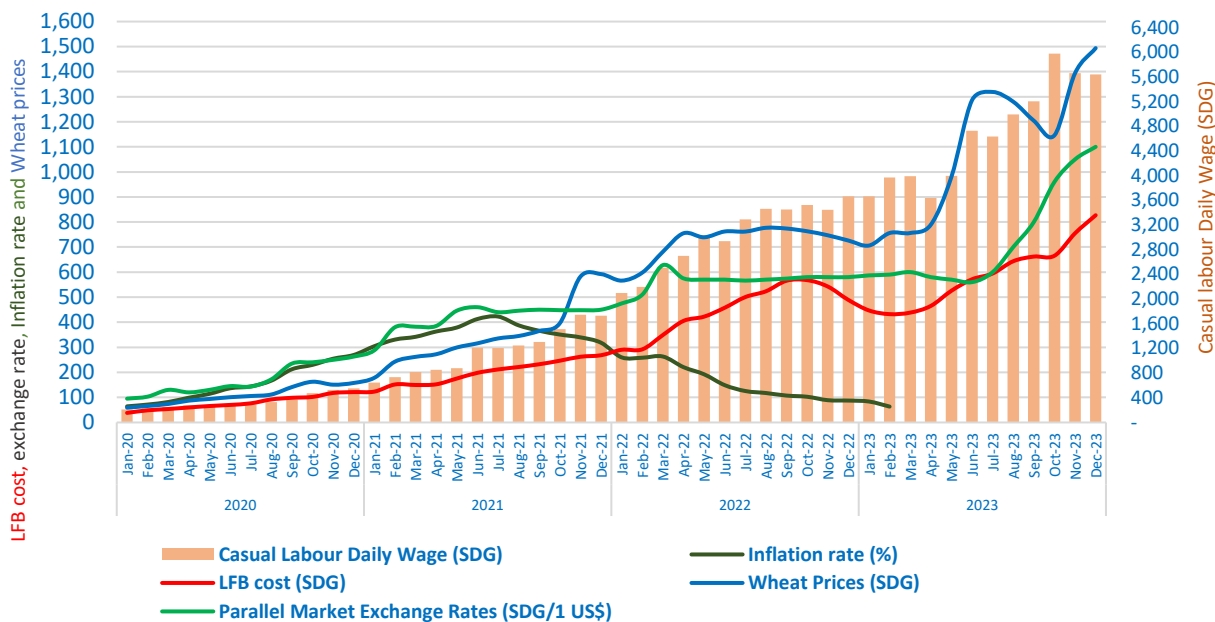
### Food Security Outlook

In December, prices for sorghum, wheat, goats, and the WFP local food basket exhibited a noteworthy increase compared to **November 2023**, while the average price of groundnut saw a significant decrease. The exchange rate underwent further devaluation in **December 2023** compared to the previous month. National average casual labour daily wages remained almost stable in **December** compared to **November**. The foreign exchange rate experienced another devaluation, trading at approximately **1,100 SDG/1US\$** in **December**, in contrast to the **November 2023** average of **1,050 SDG/1US\$**. Simultaneously, commercial banks' average rates rose to around **790 SDG/1US\$**, driven by heightened demand for foreign currency from travellers and traders engaged in importing inputs and goods.

Inflation rates have not been reported since **February 2023**; however, given the significant surge in prices for goods and services, it is anticipated to remain above **300 per cent**. The cost of a single unit of the WFP local food basket (LFB) notably increased by **9.6 per cent**, rising from **SDG 755** in **November** to **SDG 827** in **December**, indicating a **69.22 per cent** increment compared to the same month of the previous year (**SDG 489**). The average daily wage for casual labour remained stable at around **5,644 SDG**, representing a **54 per cent** increase compared to the same month in the previous year.

The current situation is expected to lead to a severe shortage of food supply and essential commodities. Coupled with an anticipated below-average crop yield this season, the increasing prices of goods and services pose a significant risk of food insecurity for millions of Sudanese people across the country.

## WFP Local Food Basket Cost versus Casual-Labour Wages, Exchange Rate, Inflation, and Wheat Prices



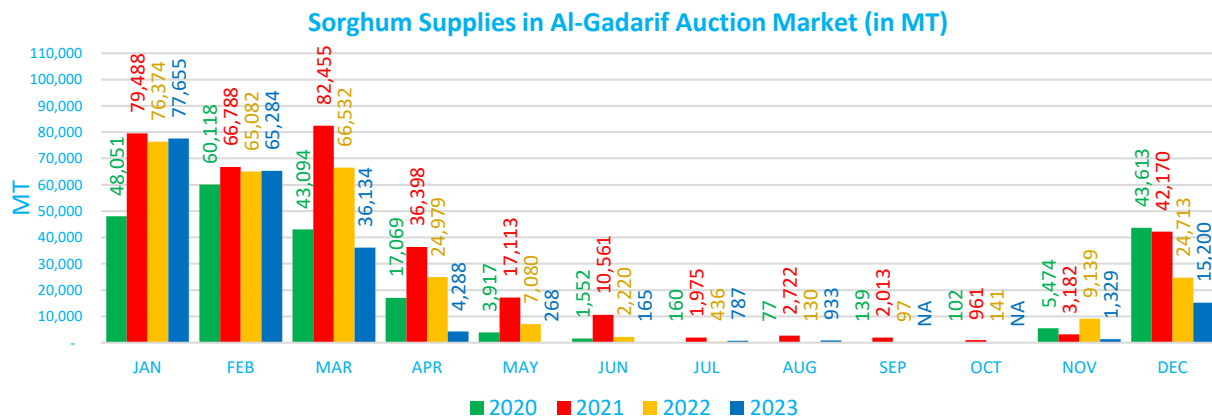
## Prices of Basic Food Items and WFP Local Food Basket Cost

	Units	Current	Previous month		Before Conflict (Q1, 2023)		1 year before	
		SDG	SDG	% Change	SDG	% Change	SDG	% Change
Sorghum	KG	463	437	↑ 6.05%	349	↑ 32.59%	360	↑ 28.68%
Wheat flour	KG	1,494	1,394	↑ 7.17%	739	↑ 102.1%	726	↑ 105.8%
Goat	Head	44,317	38,882	↑ 13.98%	26,368	↑ 68.07%	23,396	↑ 89.42%
Groundnut	Sack (45 KG)	25,964	28,654	↓ -9.39%	16,630	↑ 56.13%	13,912	↑ 86.63%
Local Food Basket	Unit	827	755	↑ 9.60%	440	↑ 88.28%	489	↑ 69.22%

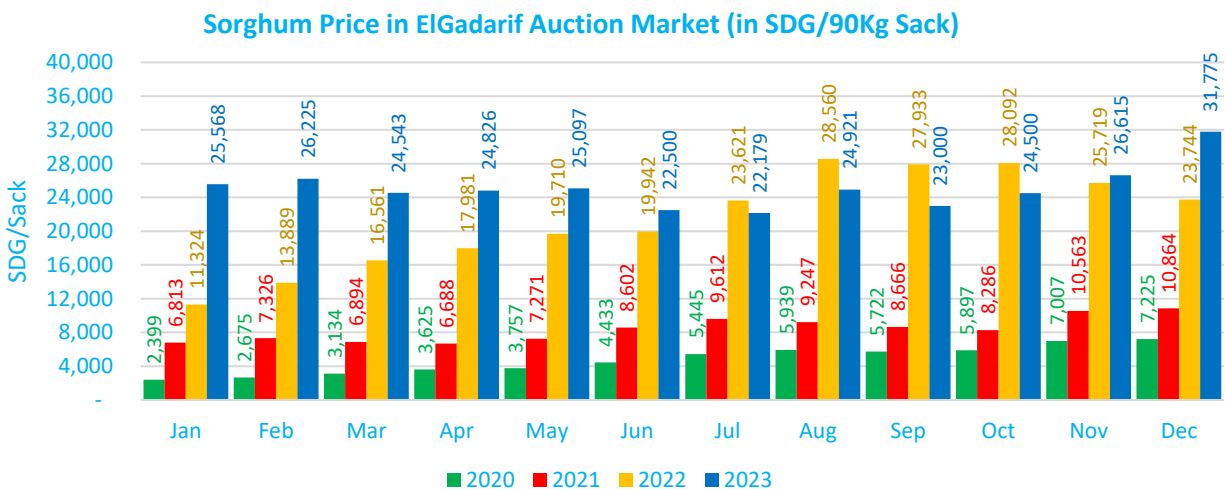


## Sorghum Prices and Supplies in AlGadarif Auction Market

In December 2023, the total supply of sorghum (Feterita) to the AlGadarif Auction Market sharply increased to **15,200 metric tons** compared to **1,329 metric tons** in the previous month. This supply represents only about **62%** and **45%** of the quantities supplied to the AlGadarif Auction Market in **December 2022** and the previous four average supply of **December**, respectively. This significant drop in the sorghum supply indicates a substantial reduction compared to the previous seasons, highlighting a notable change in the market dynamics for sorghum during this period.



In December 2023, the average wholesale price of sorghum (Feterita) in the Al Gadarif Auction Market rose to **SDG 31,775 per 90 kg sack**, compared to **SDG 26,615** in November 2023. This marks an increase of **19.4%** compared to the previous month and is **33.8%** above the same period of the previous year when the price was recorded at **23,744 SDG per 90 kg sack**. The uptick in the average wholesale price suggests a notable month-to-month increase. The current price indicates a notable decline in the production/supply of sorghum this season compared to the preceding years.



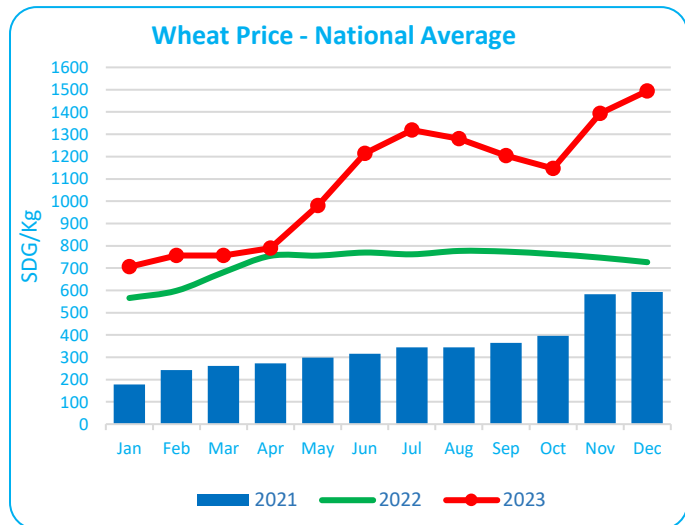
## Commodities Price in WFP Areas



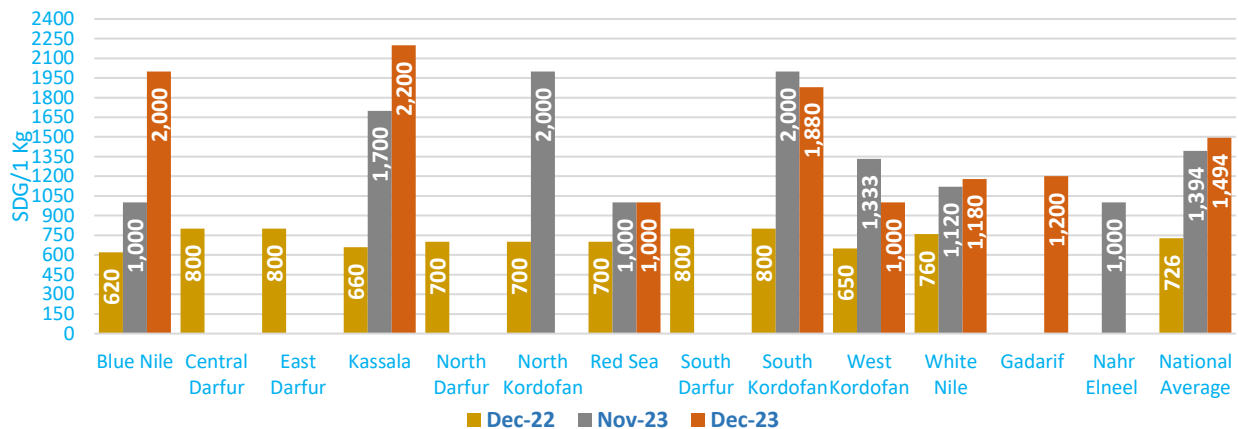
### Wheat Flour

#### National Average

In December 2023, the average retail price of wheat flour rose to **1,494 SDG/1 kg**, marking a **7.17%** increase compared to the previous month and a significant **102.1%** surge from the average of **Q1-2023**, just before the onset of conflict. Furthermore, the average retail price of wheat flour was **105.79%** higher than in **December 2022**. Despite the recent downward trend in international wheat prices, the rapid depreciation of the Sudanese currency over the second half of the year is anticipated to drive an upward trajectory in wheat flour prices in the coming months. This increase is fueled by the expectation of below-average production in the ongoing season due to ongoing conflict. Consequently, there is a heightened risk of food insecurity for many Sudanese individuals, particularly those heavily reliant on wheat as a primary cereal source. Currently, the average retail price of wheat flour is **106.0%** higher than in the same month of the previous year.



#### By States



In December, the retail prices of wheat flour displayed diverse trends across Sudan's states, with increases observed in **3 states**, decreases in **1 state**, and stability in **1 state** compared to the previous month. Notable rises were noted in Blue Nile (**100.0%**), Kassala (**29.4%**), and White Nile (**5.4%**). Conversely, a decrease was observed in South Kordofan (**25.0%**) and a slight decrease in South Kordofan (**6.0%**), while the Red Sea state experienced price stability.

In comparison to **December 2022**, the highest increases in the retail price of wheat flour were recorded in Kassala (**233%**), Blue Nile (**223%**), and South Kordofan (**125%**).

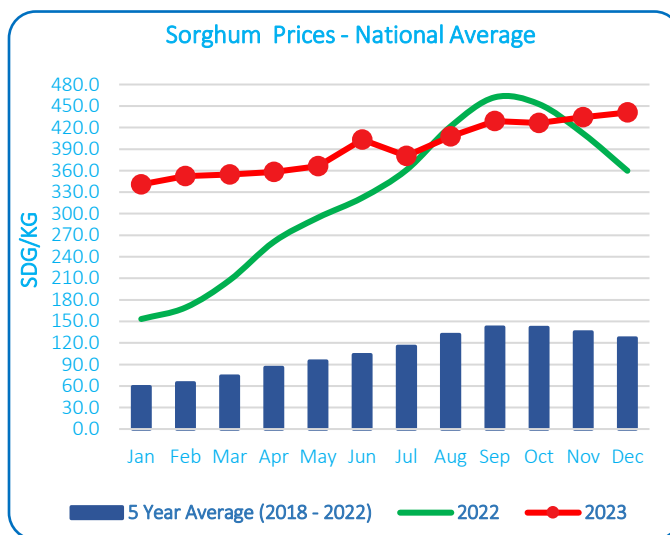


## Sorghum

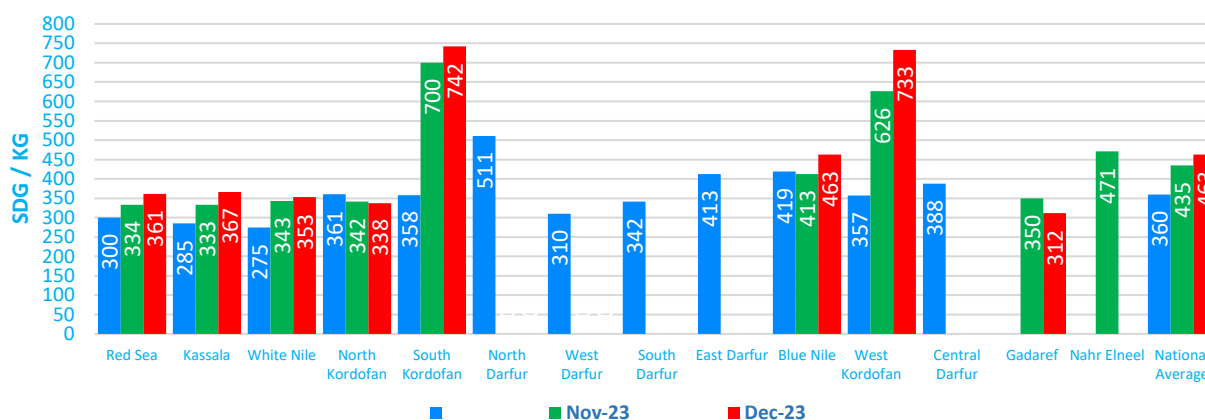
### National Average

In December 2023, the national average retail price of sorghum reached **463 SDG/Kg**, marking a **6.54%** increase compared to the previous month. This rise can be attributed

to the below-average harvest expected in many areas, contributing to the anticipation of a further increase in sorghum prices in the coming months. Sorghum prices exhibited a sharp increase compared to pre-conflict levels, soaring by **32.59%** above the average price of **Q1-2023**. Furthermore, the average retail price of sorghum was **28.68%** higher than in **December 2022**. This increase is primarily attributed to the below-average harvest during this season and the increase in the cost of production. Notably, the average retail price of sorghum was **265%** higher than the average over the five years for the month of **December**.



### By States



The retail price of sorghum displayed diverse trends across the **states** in comparison to the previous month. Notable increases were observed in West Kordofan (**17.0%**), Blue Nile (**12.0%**), Kassala (**10.0%**), Red Sea (**8.0%**), South Kordofan (**6.0%**) and White Nile (**3.0%**). In comparison, a significant decrease was observed in Gadarif (**11.0%**) and a slight decrease in North Kordofan (**1.0%**).

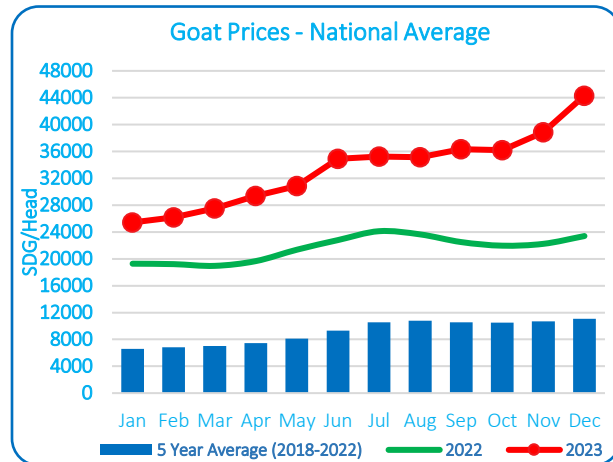
In comparison to the same period of the previous year, the most substantial increase in the retail price of sorghum was recorded in South Kordofan (**107.0%**), whereas North Kordofan experienced a slight decrease of **6.4%** (refer to the chart in Annex 1 on page 8). Significantly, sorghum retail prices were higher by **127%** to **533%** in all reported states when compared to the average of the past five years for the month of December.



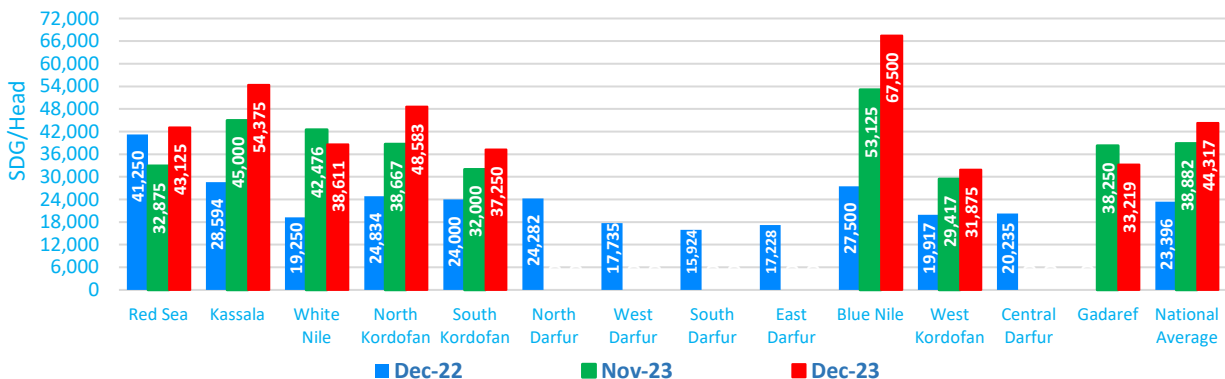
## Goat

### National Average

In December 2023, the average retail price of a goat experienced a notable increase, reaching **44,317 SDG per head**, marking a rise of **13.98%** compared to the previous month. This rise is attributed to a slight increase in demand in both local and export markets. The average price in December exhibited a sharp increase of **68.07%** compared to the period before the conflict (average prices of Q1-2023). Furthermore, the average retail price of goats surged by **89.4%** compared to the same month of the previous year, driven by the high costs of inputs. The combination of this slight increase in goat prices has positively impacted the income of livestock producers, thereby improving their purchasing power. Remarkably, the average retail price of goats was higher by **314%** compared to the five-year average, indicating a significant deviation from the typical pricing trend over the past five years.



### By States



The retail price for goats displayed different trends across monitored states compared to the previous month. Upward shifts were observed in **6 states**, with particularly sharp increases in the Red Sea state (**31.0%**), Blue Nile (**27.0%**), North Kordofan (**26.0%**), Kassala (**21.0%**), South Kordofan (**16.0%**), and West Kordofan (**8.0%**). Notable decreases in Gadarif (**13.0%**) and White Nile (**9.0%**).

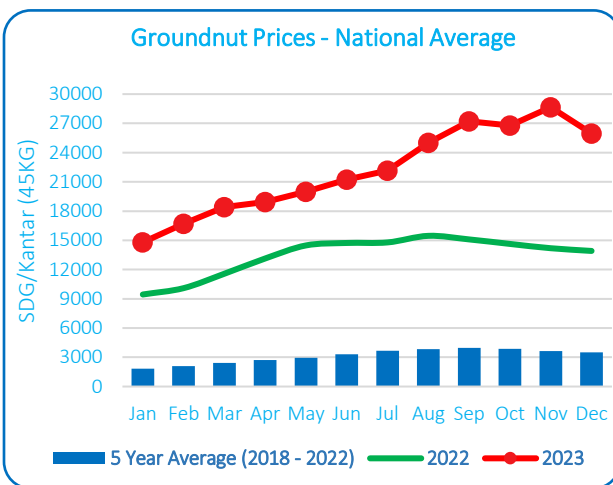
When compared to the same month of the previous year, the highest increase in the retail price of goats was recorded in Blue Nile (**145%**), closely followed by White Nile (**101%**). These fluctuations in goat prices highlight the dynamic nature of the market and regional variations in pricing trends.



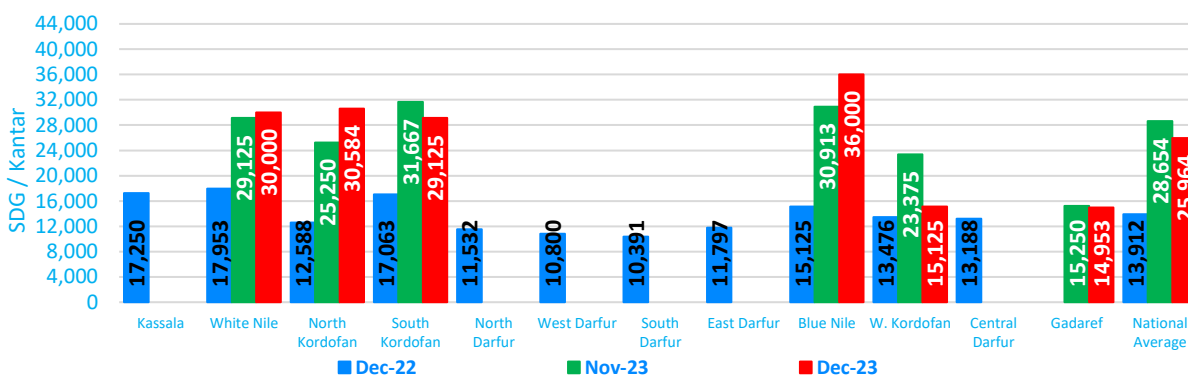
## Groundnuts

### National Average

In December 2023, the average retail price of raw groundnut remained stable around last month's price of **25,964 SDG per kantar**, a notable decrease of **9.39%** compared to the previous month. This decrease is primarily attributed to the ongoing harvesting period (October - December). The ongoing conflict in the main production areas in Western and Central Sudan may lead to a surge in prices during the coming months. The surge in groundnut prices be correlated with heightened demand from the local oil industry and disruptions in oil and oilseed imports due to the disruption of the supply chain. The average price of groundnut in December was **56.13%** higher compared to the average price of **Q1-2023**, before the onset of the current conflict, and it experienced a significant **86.63%** increase compared to the same month of the previous year. This upturn is partially attributed to the elevated costs of production during the preceding seasons. Notably, the average price of groundnut was substantially higher by **637%** compared to the five-year average of December, reflecting a considerable deviation from the typical pricing over the past five years.



### By States

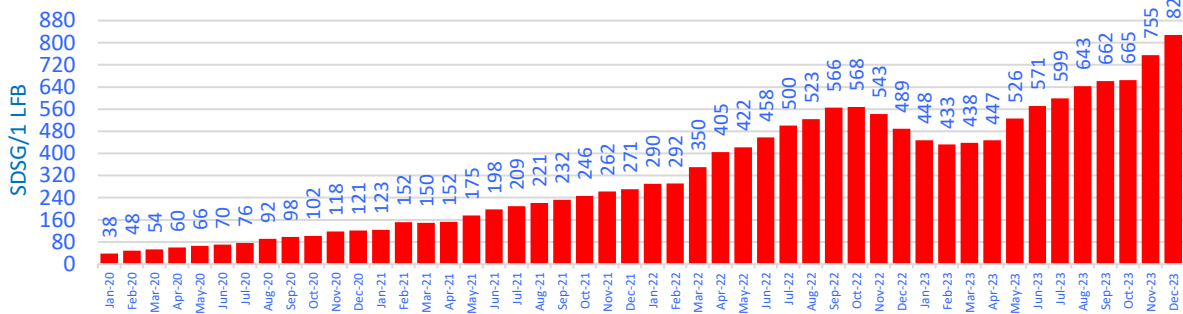


In December 2023, groundnut retail prices exhibited varied trends across states compared to the previous month. Increases were observed in **3 states** and decreases in **3 states**. There was a sharp increase in North Kordofan (**21.1%**), Blue Nile (**16.5%**) and a slight increase in White Nile (**3.0%**). Conversely, a sharp decrease was noticed in West Kordofan (**35.3%**) a notable drop in South Kordofan (**8.0%**) and a slight decrease in Gadaref (**1.9%**). During the same period, the largest increase in groundnut prices compared to the previous season was recorded in North Kordofan (**143%**), while the Blue Nile showed an increment of **138.0%** (refer to the chart in Annex 1 on page 8). Notably, groundnut prices displayed a sharp increase of **335%** to **871%** compared to the five-year average of November, indicating a significant deviation from the typical pricing observed over the past five years.

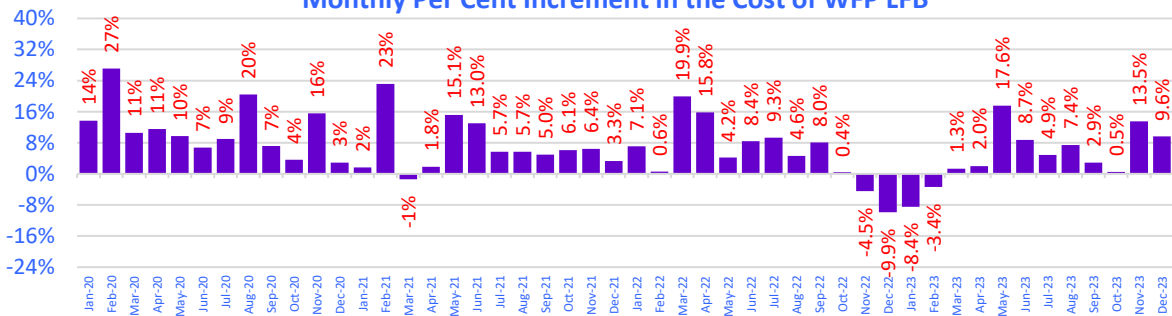
## Cost of WFP Local Food Basket (LFB)

- In December 2023, the national average cost of the WFP local food basket (LFB) was **827 Sudanese pounds per unit**, indicating a notable increase of **9.6%** compared to the previous month. The cost of the WFP basket exhibited a significant rise compared to the pre-conflict period, with an increase of **88.28%** over the **Q1-2023** average cost, pre-conflict and a **69.22%** increase compared to the same month of the previous year.
- In December 2023, the highest WFP local food basket cost was recorded in West Kordofan (**SDG 953 per unit**), followed by Blue Nile (**SDG 943**) and South Kordofan (**SDG 931**). The lowest WFP LFB cost was recorded in North Kordofan state (**SDG 651**). This variation in costs across states reflects regional disparities in the accessibility and pricing of essential food items.

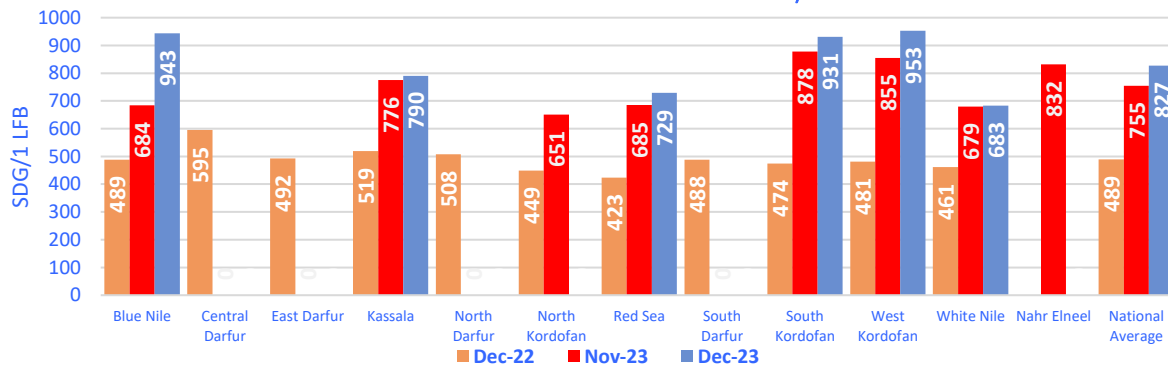
WFP Local Food Basket Cost National Average



Monthly Per Cent Increment in the Cost of WFP LFB



WFP Local Food Basket Cost - by State

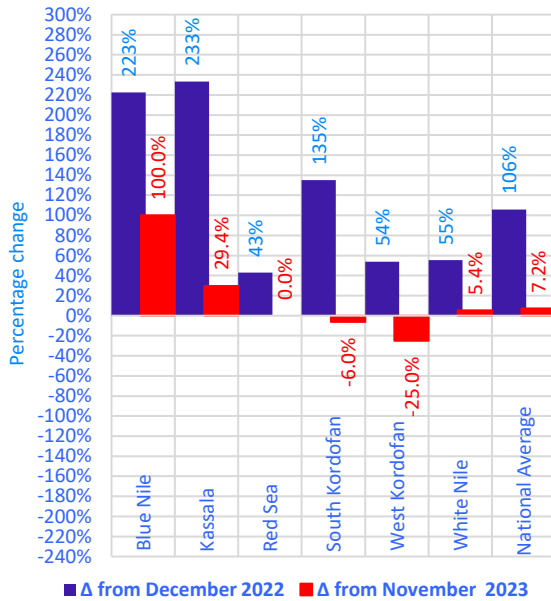




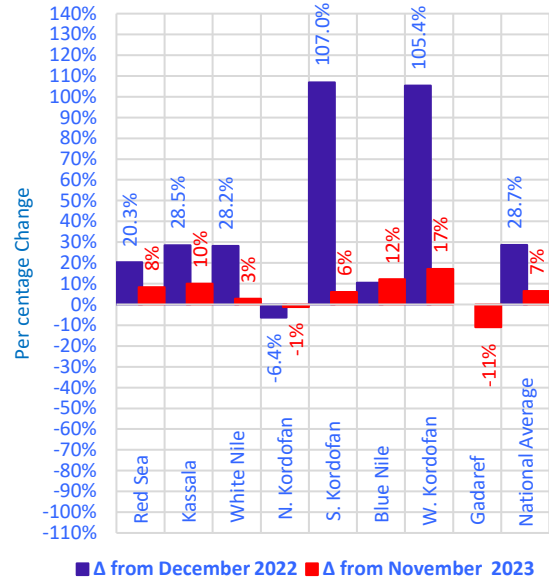
## Annexes

### Annex 1: The Percentage Change of Wheat, Sorghum, Goat, and Groundnut Prices Compared to December 2022 and November 2023.

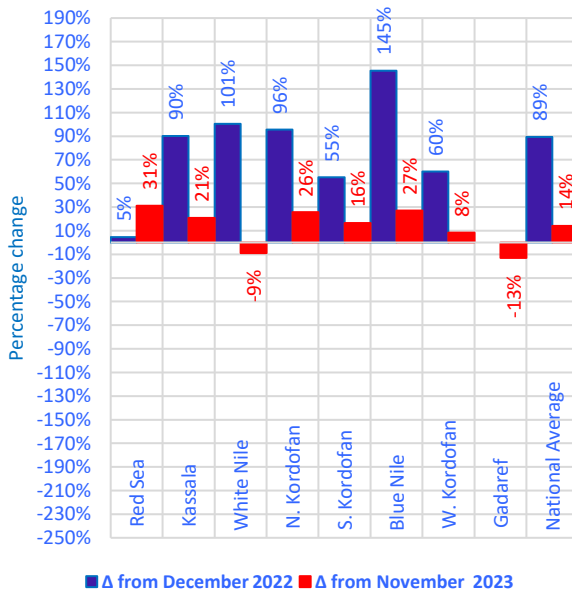
Variation of Wheat flour Prices, by states



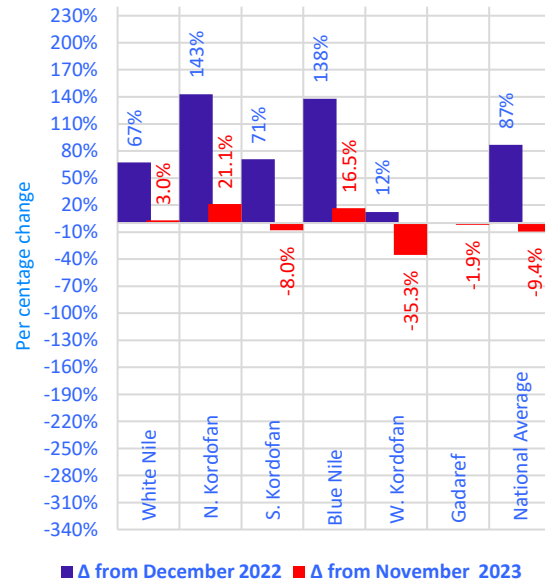
Variation of Sorghum Prices, by state



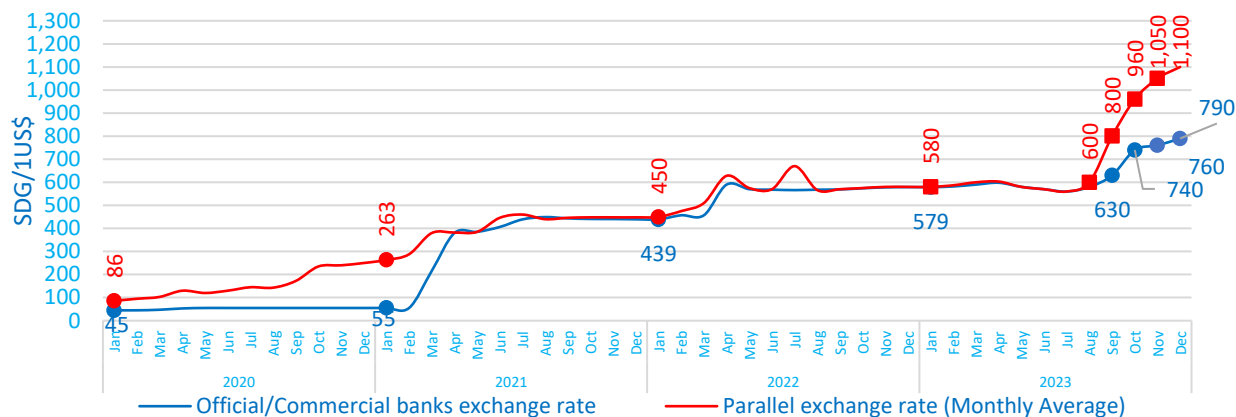
Variation of Goat Prices, by states



Variation of Groundnut Prices, by states






### Annex 2: Foreign Currency Exchange Rate:

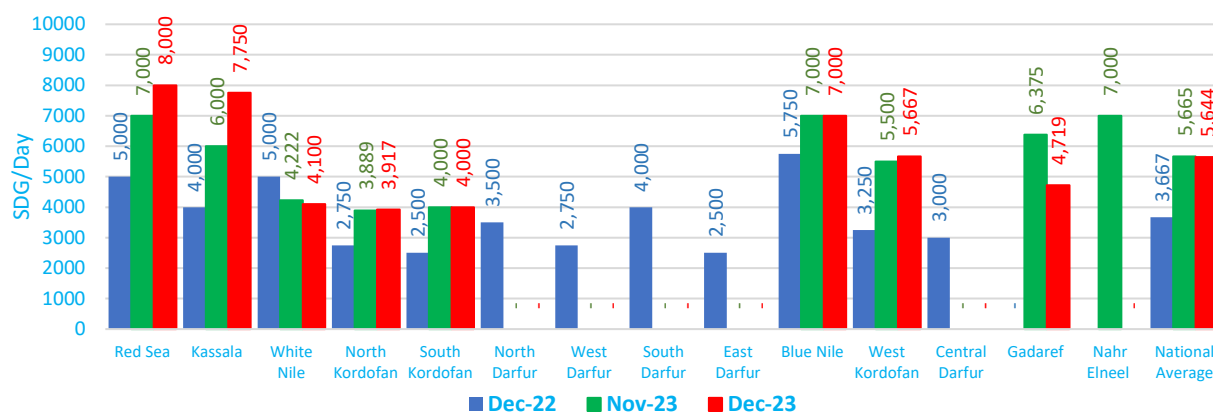


### Annexes 3: Change in the Retail Prices of the Cash-Based Transfer (CBT) Food Items

Commodity	Unit	Dec-23	Nov-23	Mar-23	Dec-22	Change		
						Compare to October 2023	Compare to March 2023 - (Before Conflict)	Compare to November 2022
Sorghum	SDG/Kg	527	477	335	365	↑ 11%	↑ 57%	↑ 44%
Onion	SDG/Kg	1,495	1,013	276	671	↑ 48%	↑ 442%	↑ 123%
Vegetable Oil (groundnut)	SDG/litre	2,781	3,000	1,683	1,423	↓ -7%	↑ 65%	↑ 95%
Cow Meat	SDG/Kg	4,769	4,354	2,538	2,511	↑ 10%	↑ 88%	↑ 90%
Goat_Sheep Meat	SDG/Kg	6,689	6,405	3,474	3,360	↑ 4%	↑ 93%	↑ 99%
Powder Milk	SDG/Kg	9,621	9,283	5,414	5,839	↑ 4%	↑ 78%	↑ 65%
Dry Tomatoes	SDG/Kg	3,074	2,840	1,500	2,043	↑ 8%	↑ 105%	↑ 50%
Sugar	SDG/Kg	1,784	1,448	717	735	↑ 23%	↑ 149%	↑ 143%
Pulses - Fabi bean	SDG/Kg	2,232	2,069	1,288	1,358	↑ 8%	↑ 73%	↑ 64%
Iodized salt	SDG/Kg	672	922	423	548	↓ -27%	↑ 59%	↑ 23%
Wheat Flour	SDG/Kg	1,494	1,394	756	726	↑ 7%	↑ 98%	↑ 106%

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

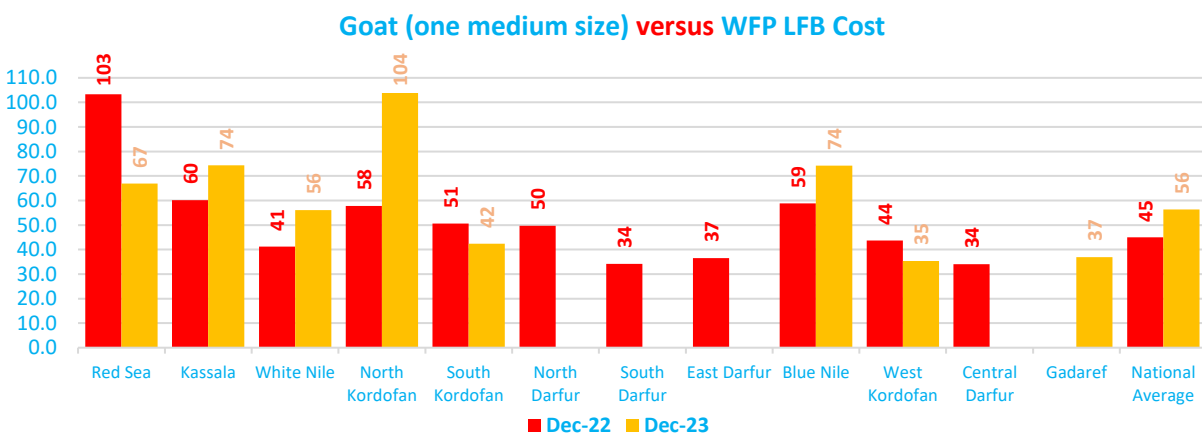
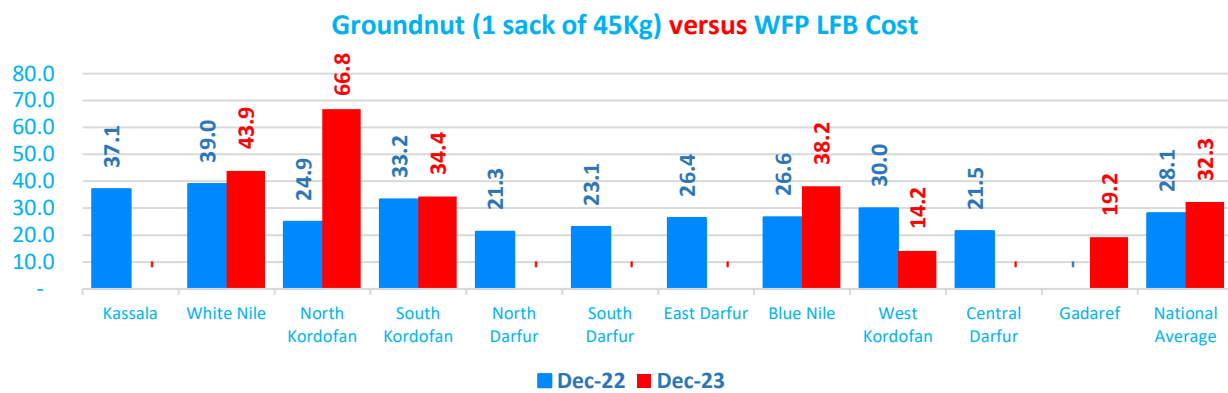
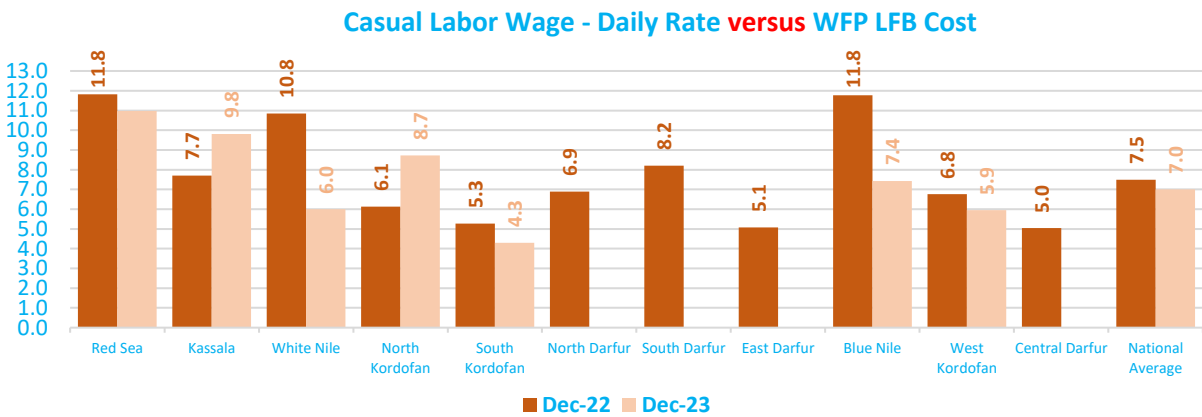
### Annex 4: Casual Labor Wage - Daily Rate (SDG/Day)



## Annex 5: Terms of Trade (TOT)

In December 2023, compared to the same period of the previous year:

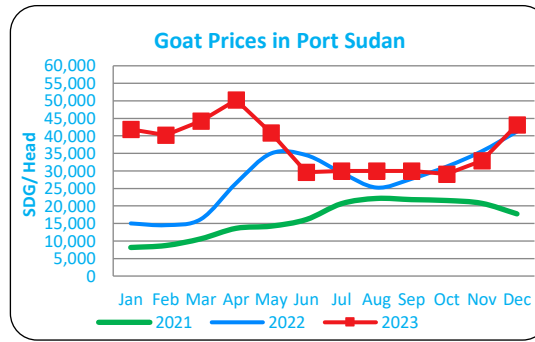
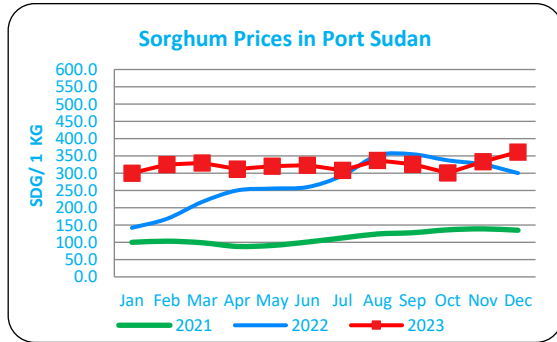
- There was an improvement in the terms of trade (TOT) between the WFP LFB cost and casual labour wage in **five** out of **six** states, while it improved in only **one** state.
- The TOT between the WFP LFB cost and one kantar of groundnut improved in **three** out of **five** states.
- The TOT between WFP LFB cost and the price of a middle-sized goat improved in **four** states out of **seven** states and worsened in the other **three** states.



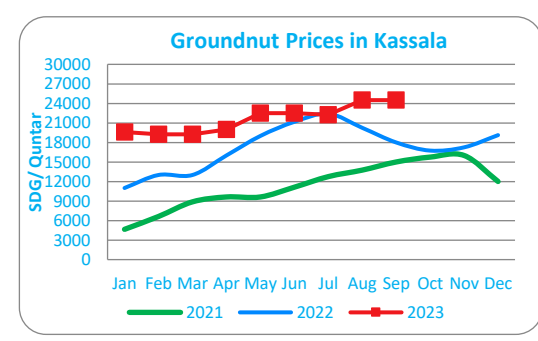
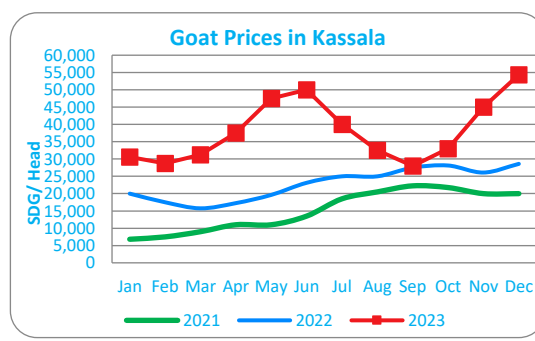
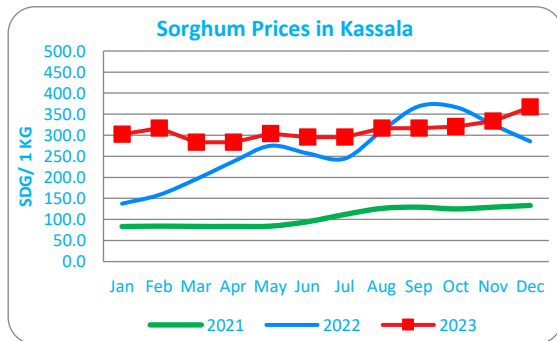
Annex 6:

Sorghum, Goat, and Groundnut Prices Trends by States

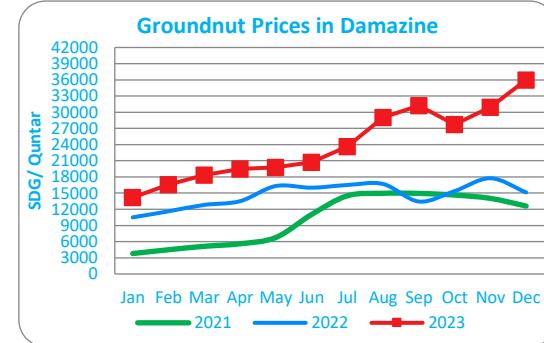
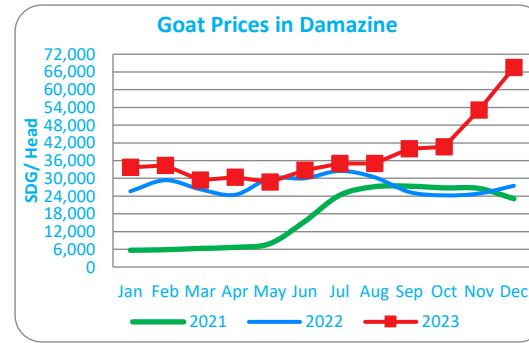
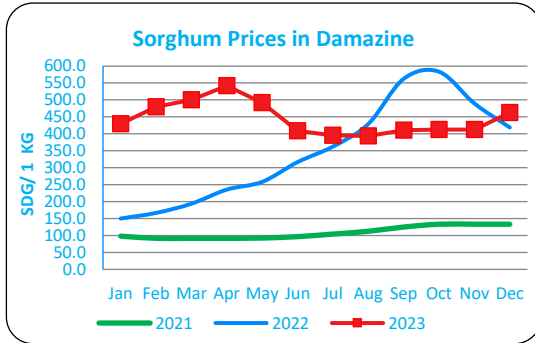
Red Sea



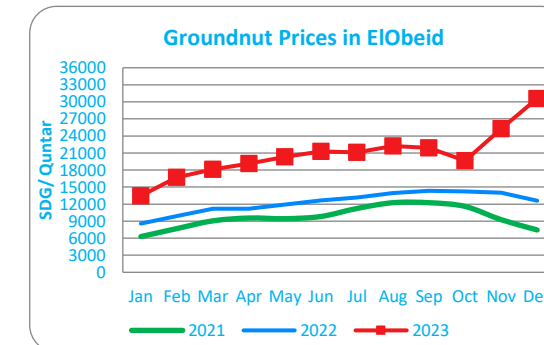
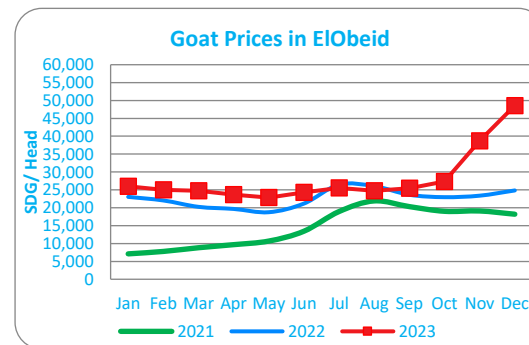
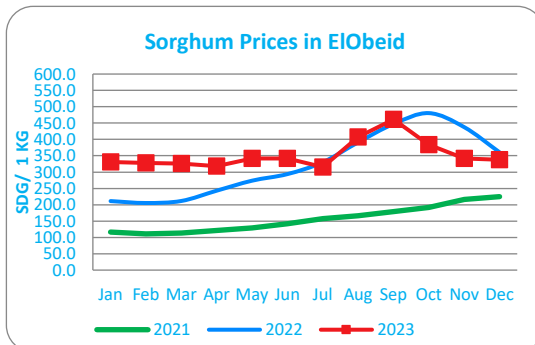
Kassala



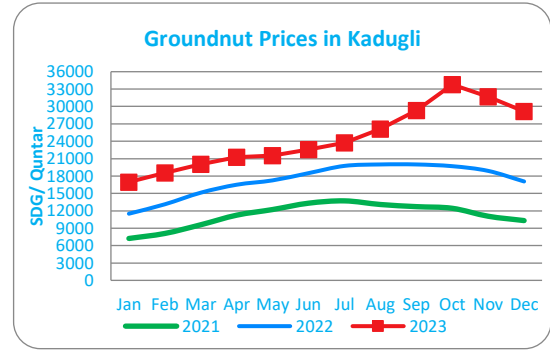
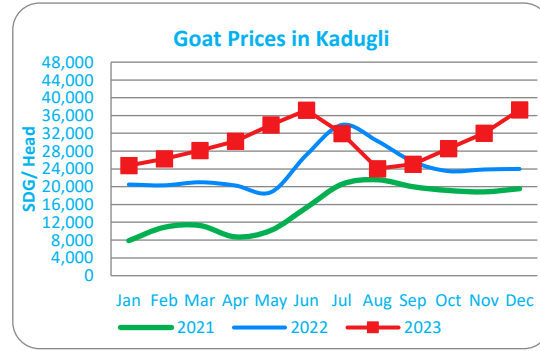
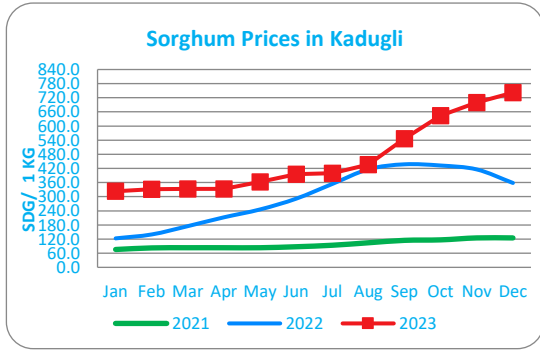
### Blue Nile



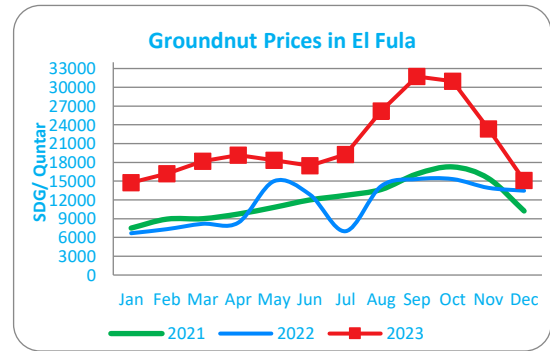
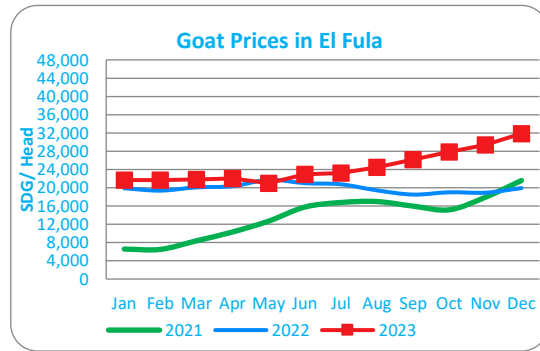
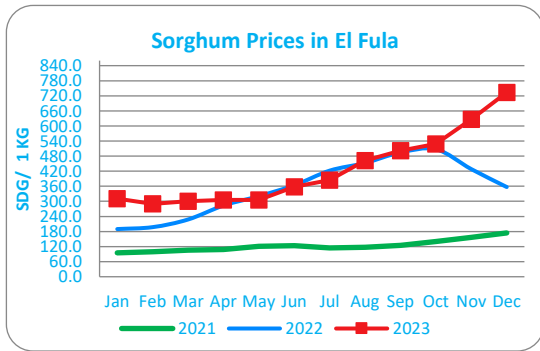
### North Kordofan



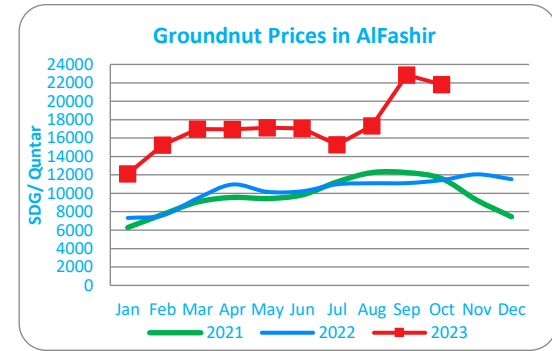
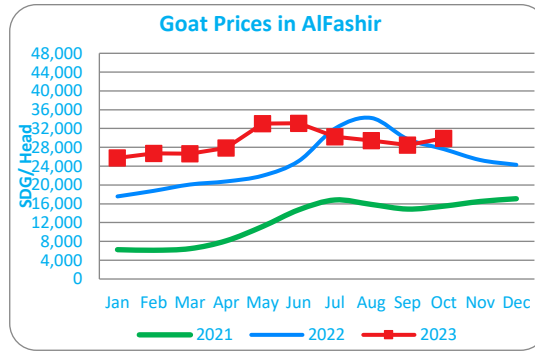
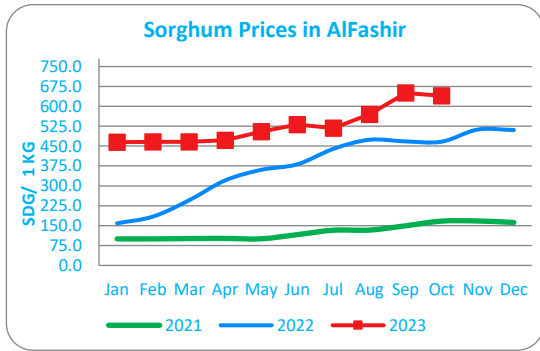
### South Kordofan



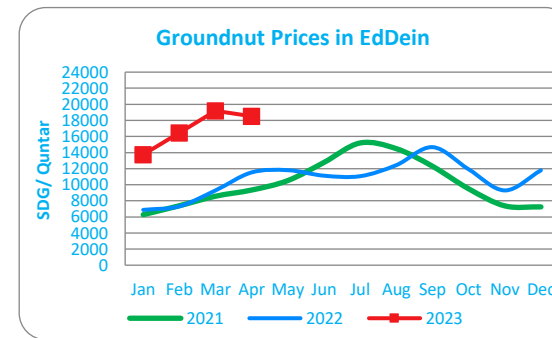
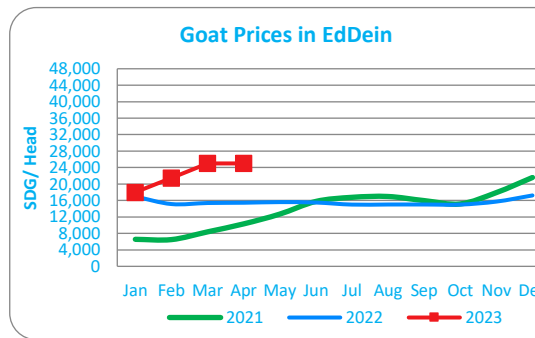
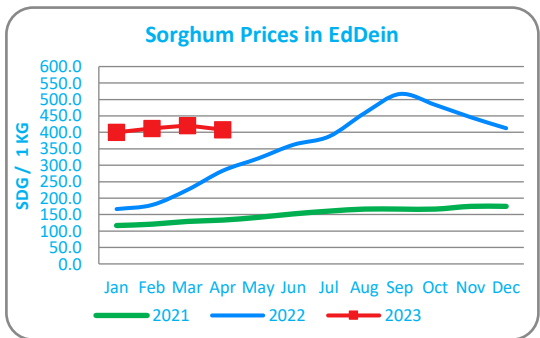
### West Kordofan



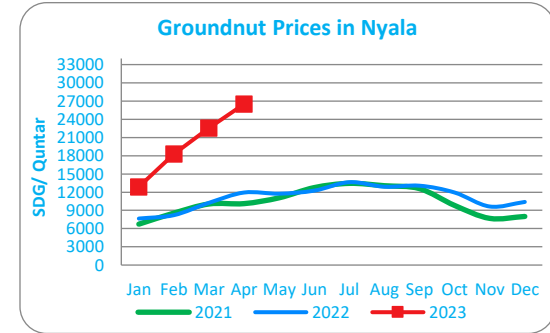
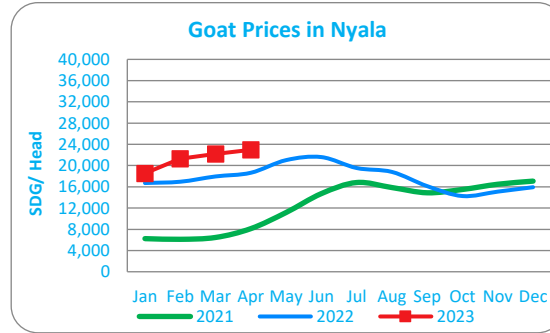
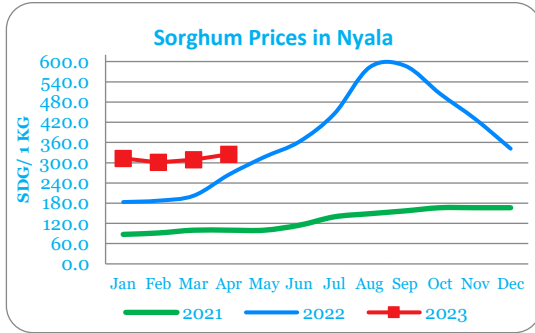
### North Darfur



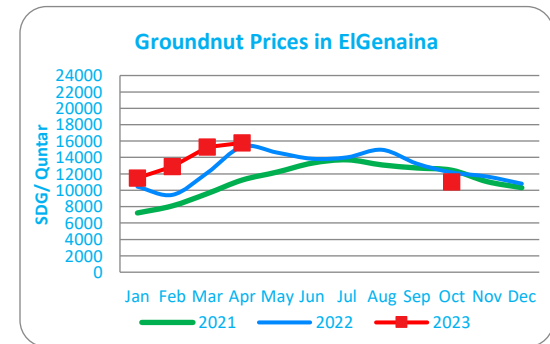
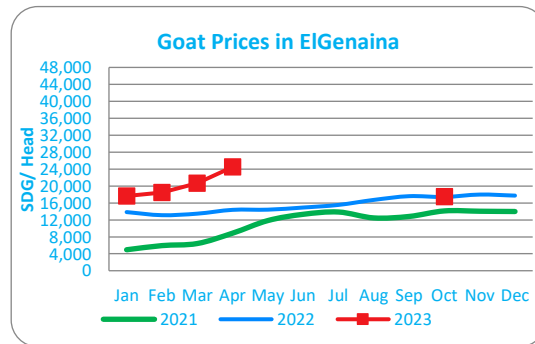
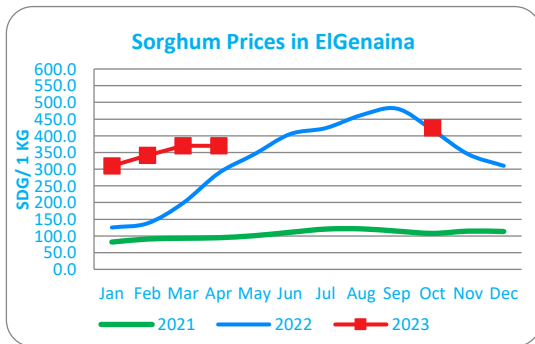
### East Darfur



### South Darfur

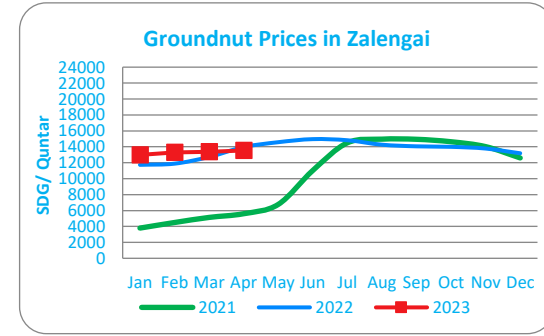
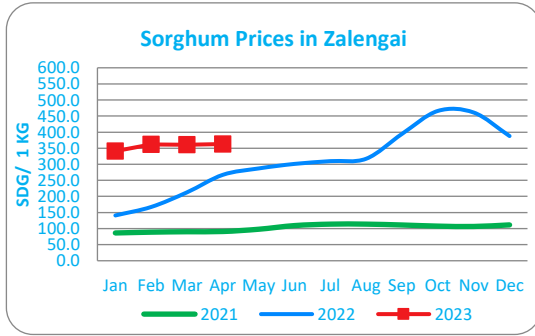


### West Darfur

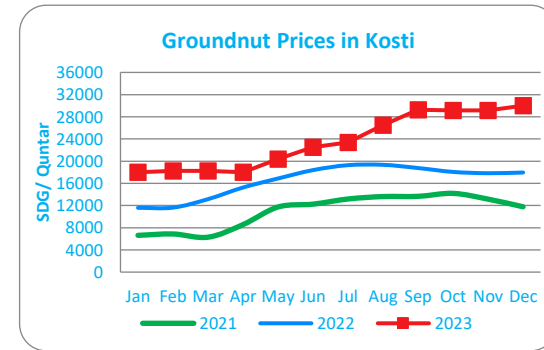
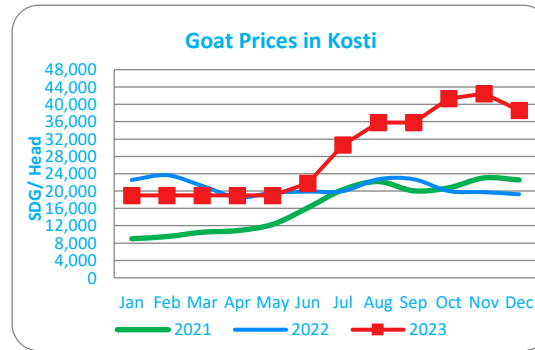
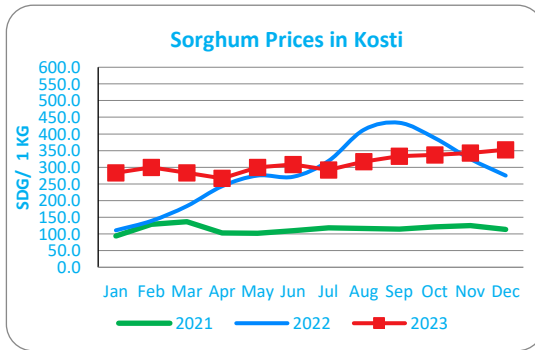




### Central Darfur



### White Nile



## National Average

