



Sudan Market Monitor – December 2025

Highlights

In November, the South Kordofan market (Kadugli) —monitored monthly by WFP—still faces severe disruptions due to siege conditions, resulting in continued high prices. Although there was a 17.8% decline in the price of sorghum in November compared to October 2025, compared to last year, there is a 407% increase. Despite the slight decline from October, the price is still extremely high and significantly distorts the national average. As a result, data from Kadugli was excluded from the overall national analysis. It was not possible to obtain data from El Fasher, another city under siege, therefore that is also excluded from the national average.

The monthly and annual percentage changes in the prices of sorghum, wheat flour, goat, groundnuts, and the WFP Local Food Basket cost – November 2025:

- WFP's National Average Local Food Basket: SDG 2,414/unit (↑7% MoM, ↑ 35% YoY)
- Sorghum: SDG 1,656/kg (↑ 16% MoM and ↓6% YoY)
- Wheat Flour: SDG 3,188/kg (↑21% MoM, ↑16% YoY)
- Goat: SDG 243253/head (↓23% MoM, ↑81% YoY)
- Groundnuts: SDG 101,079/kantar (↓4% MoM, ↑148% YoY)

Sudanese Pound:

- SDG 3,550/USD in the Parallel Market (↑1.25% MoM, ↓43% YoY)
- SDG 2,400/USD in Commercial Banks (Stable MoM, ↓22% YoY)

Key Drivers: Currency depreciation, supply chain disruptions, and rising cost of production.

Market Outlook and Price Developments - (November 2025)

In November 2025, prices of most major food commodities showed increasing trends compared to last month. Compared to last year, the price of the average national local food basket increased by 35%, and by 7% compared to last month. Sorghum price increased by 16% compared to last month, while it declined by 6% compared to last year. Wheat flour increased by 21% compared to last month and by 16% compared to last year. Meanwhile, the Sudanese Pound showed a slight gain on the parallel market. It appreciated by 1.25%, trading at approximately SDG 3,550 per USD, while the commercial bank rate remained stable at SDG 2,400 per USD month-on-month. Year-on-year, the currency has lost 43% of its value on the parallel market and 22% in commercial banks. The gap between the commercial bank and parallel rates has been widening an accelerated rate, especially since June 2025.

Methodology

Market prices are collected by WFP staff from the capitals of each state on monthly basis. The data is analysed at the state-level and national average indicators are derived from this state-level information. In addition, the CO gathers macro-economic data and indicators, including crops supply, inflation, and exchange rates, from official reports issued by government and UN agencies.

Note: This report issued based on October 2025 data.

Wage Trends in Relation to Food Basket Prices, Currency Value, and Key Commodities

In November 2025, cereal prices exhibited increasing trends. The national average price of sorghum increased by 16%, while wheat flour increased by 21% compared to October. The cost of the WFP Local Food Basket (LFB) climbed by 7% month-on-month, while it increased by 35% compared to last year. At the same time, national average wages for casual labor declined by 7% compared to last month but increased by 58% compared to last year excluding Kadugli and El-Fasher markets.

The Sudanese Pound improved slightly compared to last month, compared to last year however, it showed a substantial decline of 43% on the parallel market. Despite the ongoing harvest, the cost of cereals increased in November while the cost of daily wage labour declined making those labour dependent households more food insecure. The ongoing conflict resulted in supply chain disruptions, loss of livelihoods, unprecedented levels of displacement, and reduced food production in different parts of the country which in turn led to the continued extreme food insecurity.

The persistently high cost of living, compounded by conflict, continues to restrict access to adequate and nutritious food. These conditions underscore the urgent need for sustained humanitarian assistance and broader economic support to mitigate the crisis and protect vulnerable communities.

Wage, wheat & sorghum prices - food basket cost & exchange rate

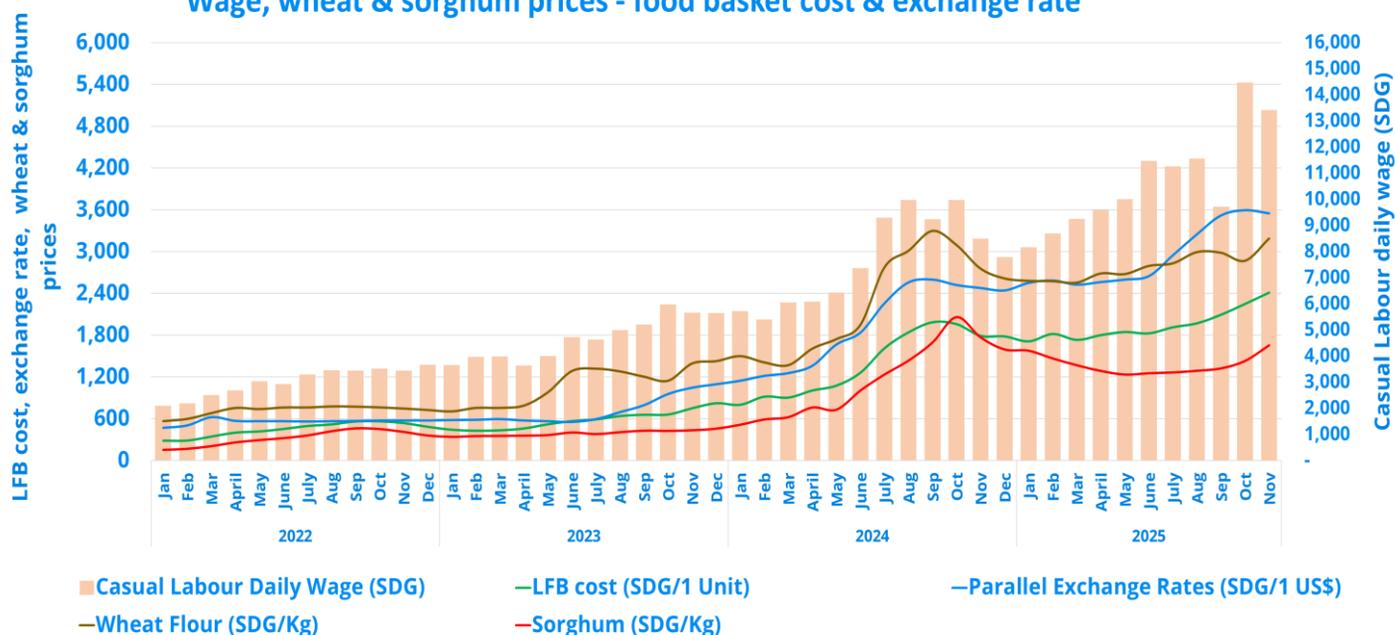
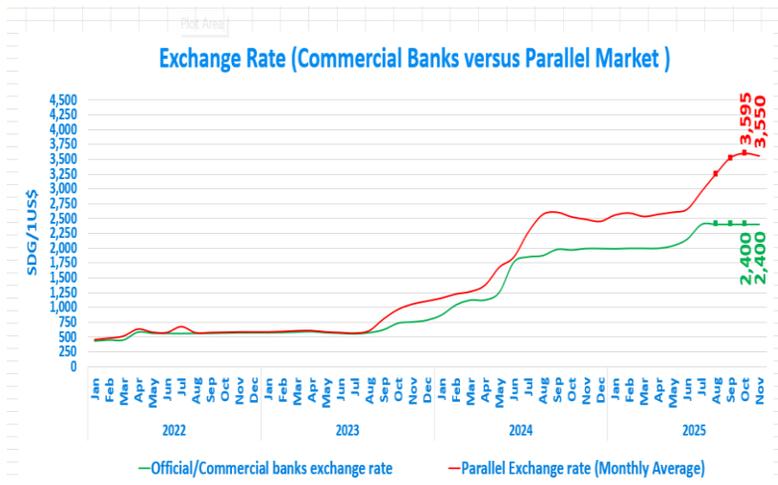


Table A: Trend of Basic Commodities prices and WFP Local Food Basket (monthly average prices - October 2025)

Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	1 Kg	1,656		1,431	▲ 16%	1,769	▼ -6%
Wheat Flour	1 Kg	3,188		4,047	▲ -21%	2,755	▲ 16%
Goat/sheep	One Head	243,253		198,037	▼ 23%	134,177	▲ 81%
Groundnut	1 Sack (45kg)	101,079		97,298	▼ 4%	40,708	▲ 148%
LFB Cost	1 Unit	2,414		2,252	▲ 7%	1,794	▲ 35%

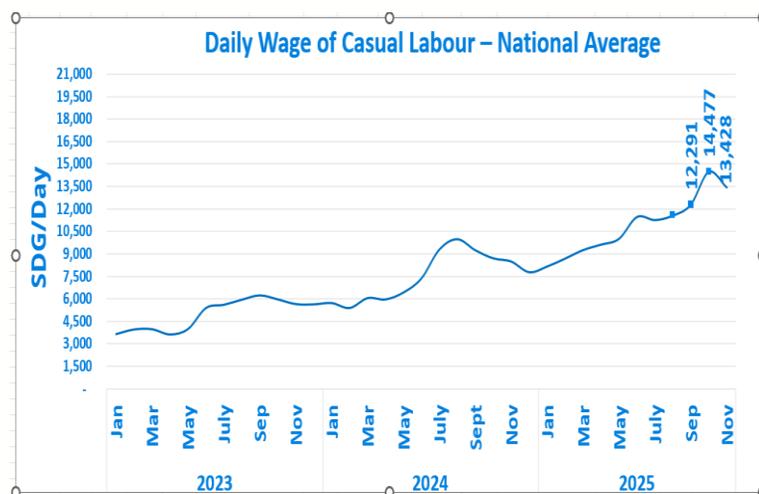
Foreign Currency Exchange Rate

In November 2025, the Sudanese pound gained slightly in the parallel market by 1% compared to October against the US dollar trading at 3,550 SDG/USD, compared to 3,595 SDG/USD in October. Over the past year, the currency has lost 43 percent of its value. In contrast, rates at commercial banks held steady month-on-month but still reflect a 20 percent depreciation compared to October 2024. These movements underscore the persistent volatility in Sudan's foreign exchange market, where the ongoing depreciation of the pound is fueling inflation and exacerbating broader economic instability.



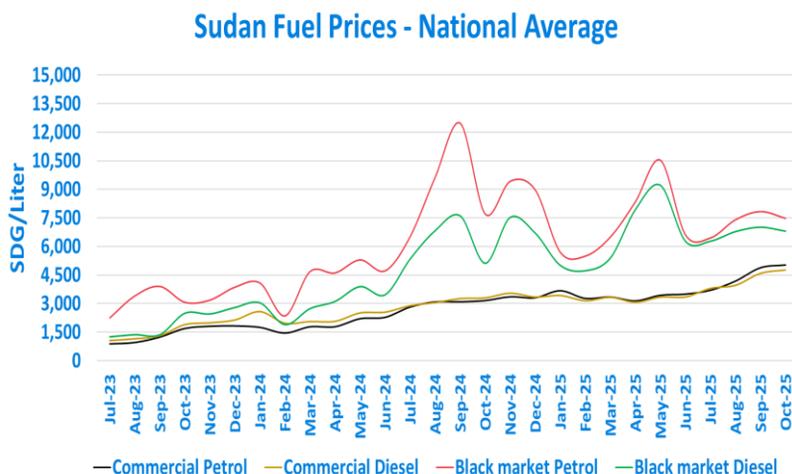
Casual Labour Wage Rate

In November 2025, the average daily wage for casual labour in Sudan was recorded at 13,428 SDG, reflecting a 7 percent decline compared to October 2025. This slight month-on-month decrease suggests a temporary easing in wage rates, which could be linked to seasonal labour demand or short-term market adjustments. However, when viewed from a broader perspective, wages remain significantly elevated. Compared to the same period last year, the current rate represents a substantial 58 percent increase, underscoring the persistent inflationary pressures and economic challenges facing households.



Fuel Prices

In November 2025, commercial fuel prices declined compared to October. Compared to the same time last year, however, prices increased substantially. The price of commercial petrol increased by 32% while the price of commercial diesel increased by 36% compared to last year. On the parallel market, petrol prices declined slightly compared to last month while it declined by 16% compared to last year. Parallel market diesel on the other hand increased by 4% compared to last month and decreased by 6% compared to last month. The decline in the parallel market could be linked to the exclusion of the inaccessible markets of Kadugli and El Fasher from the calculation of the national average while the year to year increase in the commercial petrol and diesel could be linked to the overall contraction of the economy.



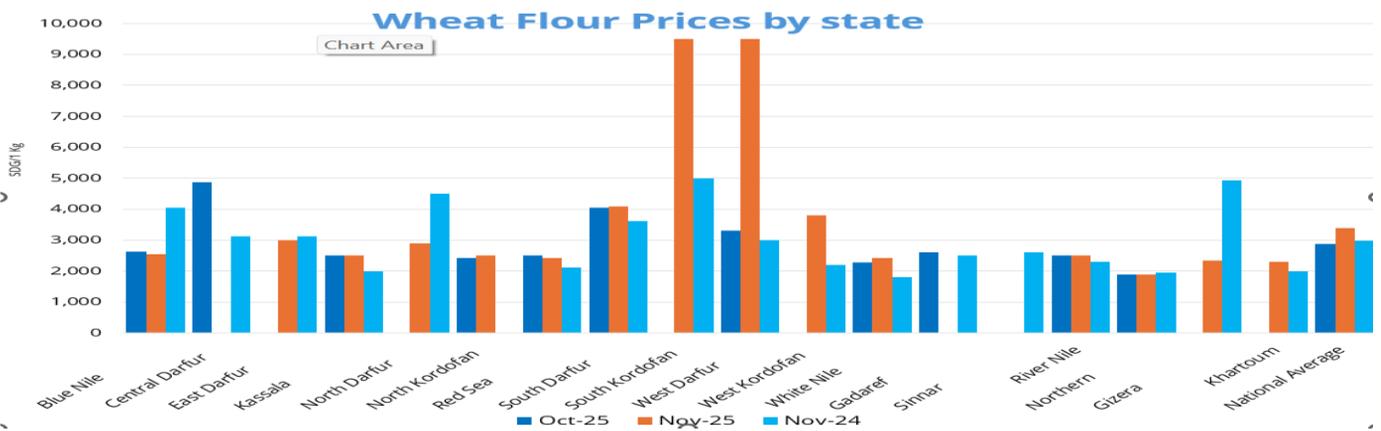
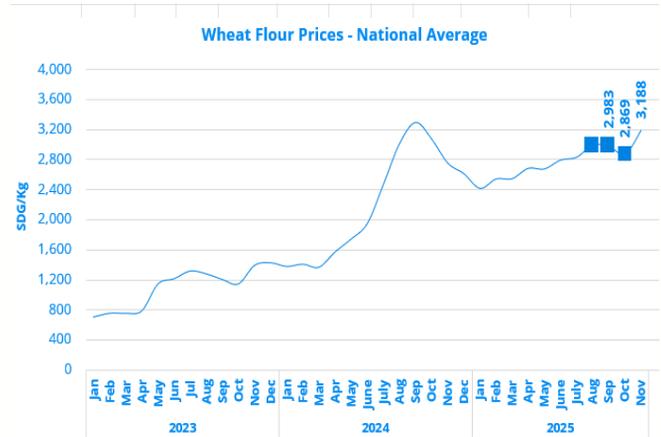
Price Developments of Basic Commodities



Wheat Flour

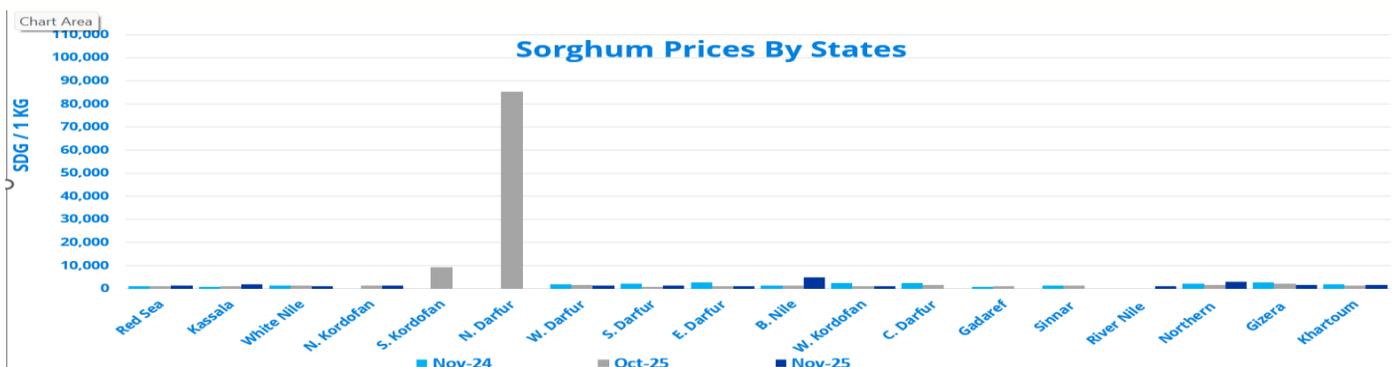
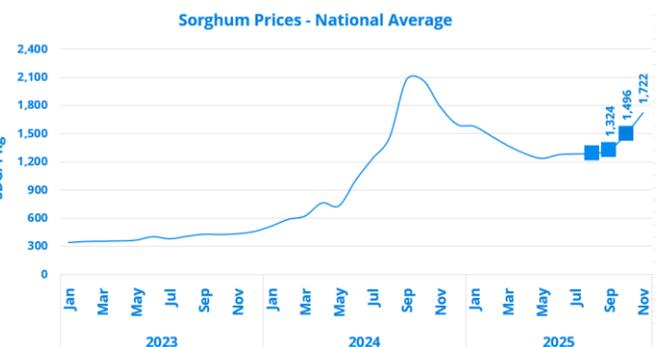
In November 2025, the national average price of wheat flour in Sudan stood at SDG 3,188/kg (↑21% MoM, ↑16% YoY)

, reflecting a 21% percent increase from October and a 16% increase from last year. Regional variations remain pronounced with West Darfur and South Kordofan recording the highest prices in the country, due to the ongoing conflict and a noteworthy improvement in North Darfur compared to last year. These three states are areas with ongoing intense conflict. West Kordofan was also another state that showed substantial increase compared to last year. The other states reported prices that are close to last year.



Sorghum (grain) - Feterita

In November 2025, Sudan's national average retail price of sorghum rose to SDG 1,656 per kilogram, 16% increase compared to October and a 6% decrease from last year. Excluding the state capitals of North Darfur and South Kordofan, that are under siege, the highest price for sorghum was seen in Blue Nile state followed by Northern state. These variations are primarily driven by supply chain disruptions in insecure regions and proximity to major production zones.



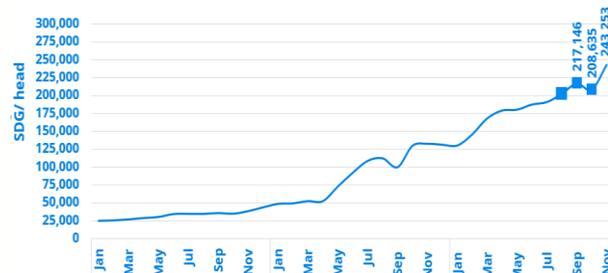
Price Developments of Basic Commodities

Goat

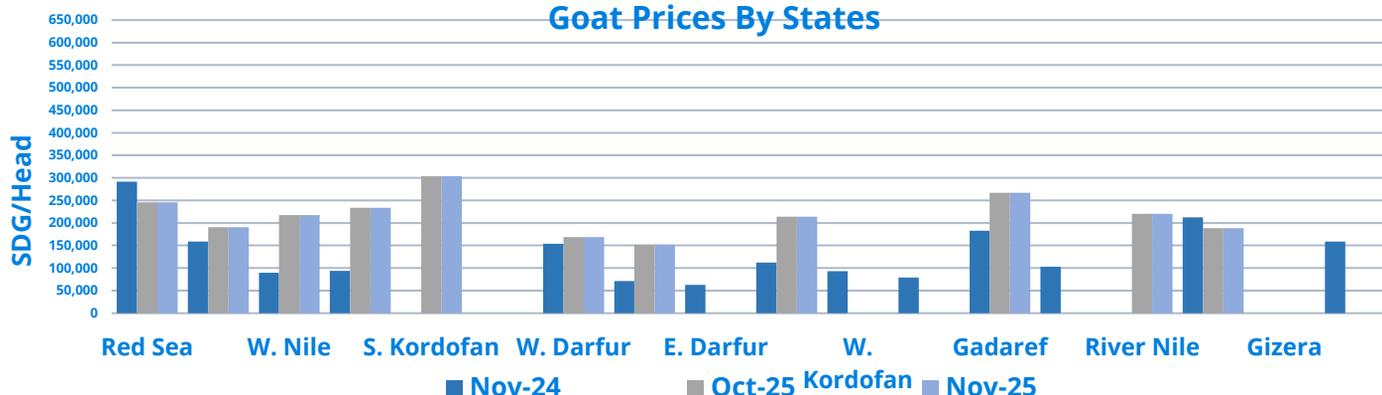
In November 2025, the national average price of goats in Sudan increased by to approximately SDG 243,253 per head, an 11% increase from October and a significant 83% higher than last year.

The highest prices were recorded in South Kordofan, followed by Gadarif and Red Sea states. These regional disparities reflect the ongoing supply chain disruptions, including in the export market.

Goat Prices - National Average



Goat Prices By States



Groundnut

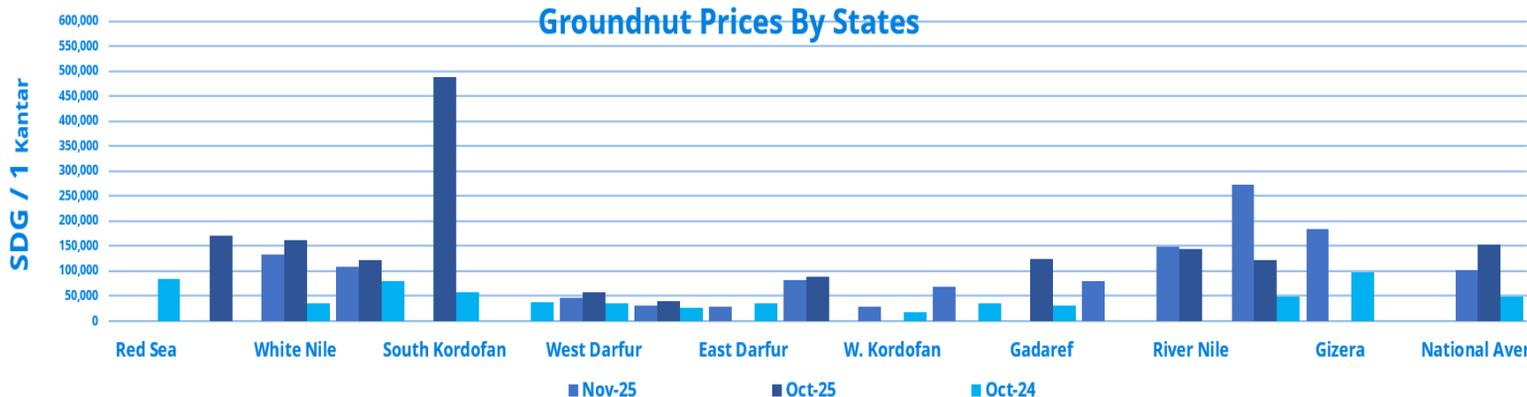
In November 2025, the national average price of groundnut was groundnut prices averaged SDG 010,079 per kantar, a 33% decline from last month but a significant 112% up compared to last year.

Prices were highest in South Kordofan and eastern states, while western regions—key production zones—recorded the lowest rates, reflecting ongoing market volatility and supply chain disruptions.

Groundnuts - National Average



Groundnut Prices By States



1 Note on the Components of the WFP local Food Basket and In-kind basket

The WFP LFB basket consists of eight food items designed to provide 2,100 kcal per person per day. The cost of the WFP LFB basket is used in CFSA analysis and reports to calculate purchasing power and affordability for beneficiaries, such as determining how many food baskets households can afford.

Table 20: Components and quantities of the WFP LFP

Full ration 2,100 Kcal	Sorghum	Onion	Vegetable oil	Cow meat	Goat meat	Milk powder	Dry tomatoes	Sugar
g/pc/day	450	50	25	5	5	25	25	40

The in-kind food basket includes four food items: Cereal (sorghum), Vegetable Oil (groundnut oil), Pulses (faba beans), and iodized salt. These items are distributed by WFP as in-kind assistance, either as a full or half ration, depending on resources. The cost of these in-kind items is used to calculate the Transfer Value for CBT (Cash-Based Transfers).

Table 21: Components and quantities of the in-kind food basket

Modality In-kind (Full ration)	Cereals	Pulses	Vegetable Oil	Salt
g/pc/day	475	60	30	10

For more information:

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