Sudan Market Monitor – February 2026

Highlights

In January 2026, the state capital market of Kadugli, which is monitored monthly by WFP, continued to experience severe disruptions due to ongoing siege conditions in January. These disruptions led to sharp price spikes and, in some cases, the complete unavailability of certain commodities. Consequently, data from the Kadugli market was excluded from the national analysis. For this edition, the national average is calculated using data from the remaining seventeen states. Additionally, for North Darfur, Taweela market is currently being reported instead of El Fasher.

The monthly and annual percentage changes in the prices of sorghum, wheat flour, goat, groundnuts, and the WFP Local Food Basket cost – January 2026:

- WFP Local Food Basket: SDG 1,974/unit (⬇ 3.7 % MoM, ⬆ 10 % YoY)
- Sorghum: SDG 1,194/kg (⬆ 0.8 % MoM, ⬇ 24 % YoY)
- Wheat Flour: SDG 3,167/kg (⬇ 13.3% MoM, ⬆ 31 % YoY)
- Goat: SDG 250,489/head (↔ 0.0 % MoM, ⬆ 92 % YoY)
- Groundnuts: SDG 108,585 /kantar (⬇ 19.3 % MoM, ⬆ 59 % YoY)

Sudanese Pound:

- SDG 3,575/USD in the Parallel Market (⬇ 1.0% MoM, ⬇ 40 % YoY)
- SDG 2,400/USD in Commercial Banks (↔ 0.0 % MoM, ⬆ 21 % YoY)

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

Market and Food Security Overview - (January 2025)

In January 2025, prices for most major basic food commodities decreased or remained stable, except for sorghum and wheat flour, which recorded increases. The national average cost of the WFP Local Food Basket (LFB) is SDG 1,974 per unit, reflecting a 3.8% decrease from December 2025 and a 10% increase compared with January 2025.

The Sudanese Pound slightly depreciated in the parallel market, trading at around SDG 3,575 per USD, and the commercial bank exchange rate also held steady at SDG 2,400 per USD month-on-month. However, year-on-year, the currency has been depreciated by 40% on the parallel market and 21% in commercial banks.

The ongoing harvest season, along with improvements in supply chain access, has slightly enhanced food availability, particularly in non-conflict areas.

Methodology

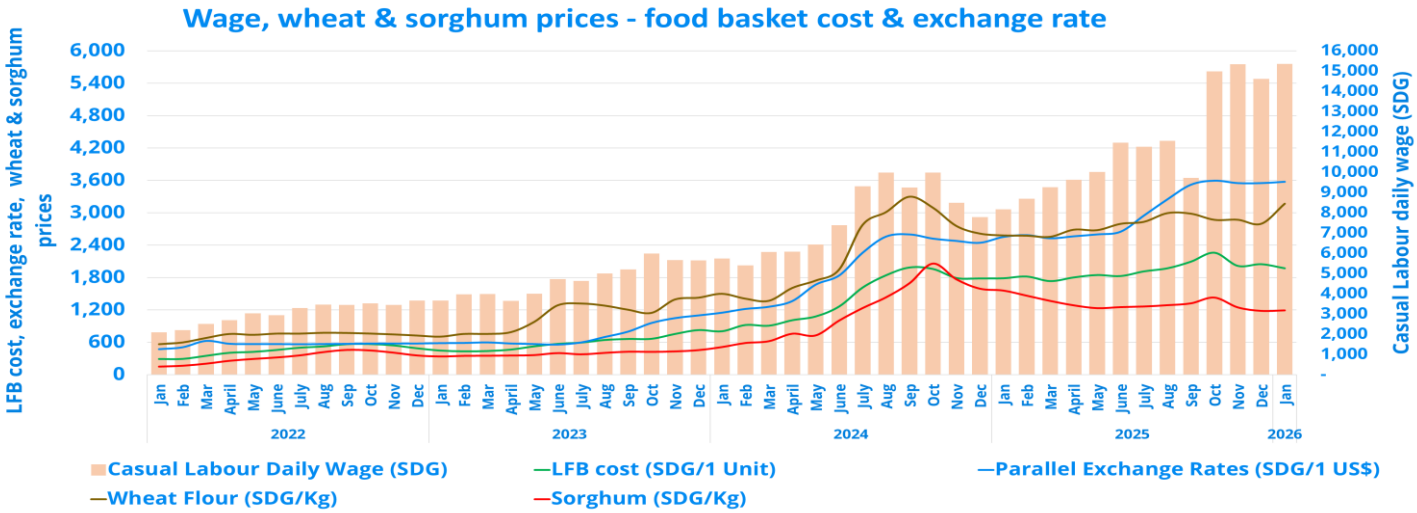
Market prices are collected by WFP staff from the capitals of each state on monthly basis. The data is analysed at the state-level and national average indicators are derived from this state-level information. In addition, the CO gathers macro-economic data and indicators, including crops supply, inflation, and exchange rates, from official reports issued by government and UN agencies.
Note: This report issued based on January 2026 data.

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

In January 2026, cereal prices continued to rise. The national average price of sorghum increased slightly by 0.8%, while wheat flour rose by 13.3% compared to December 2025. The cost of the WFP Local Food Basket (LFB), however, declined by 3.7 % month-on-month. During the same period, national average wages for casual labor increased by 5% (excluding the Kadugli market).

The Sudanese Pound experienced a slight month-on-month depreciation in the parallel market, in addition to a continued significant year-on-year decline. With the ongoing harvest, food prices have begun to ease gradually, reflected in only modest increases in cereal prices and a slight reduction in the LFB cost in January.

However, these improvements only marginally extend to conflict-affected areas and locations under siege, where limited access continues to restrict the availability of sufficient and nutritious food. These conditions underscore the continued urgent need for sustained humanitarian assistance to support the most vulnerable communities.



WFP Local Food Basket Cost[1] Basic Food Prices and Food Security

In January 2025, the cost of basic food commodities declined, with price reductions ranging from 7% to 24%, except for sorghum and wheat flour, which did not follow this trend (Annex 2, Table 19). As a result, the national average cost of the WFP Local Food Basket (LFB) decreased slightly by 3.7% compared to the previous month, after excluding data from the besieged capital. These improvements in many food prices have contributed positively to overall economic stability and are expected to support a modest improvement in household food security nationwide.

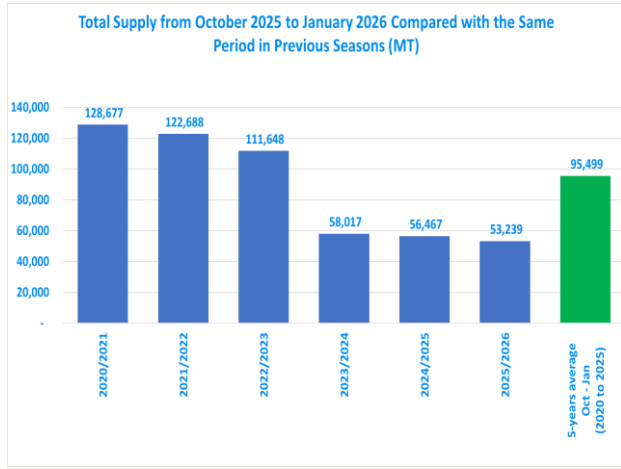
Over the past year, prices of small ruminants (goats and sheep) have remained stable, while declining groundnut prices contributed to a slight reduction in vegetable oil prices—enhancing affordability for vulnerable households.

Table A: Trend of Basic Commodities prices and WFP Local Food Basket (monthly national average prices – January 2026)

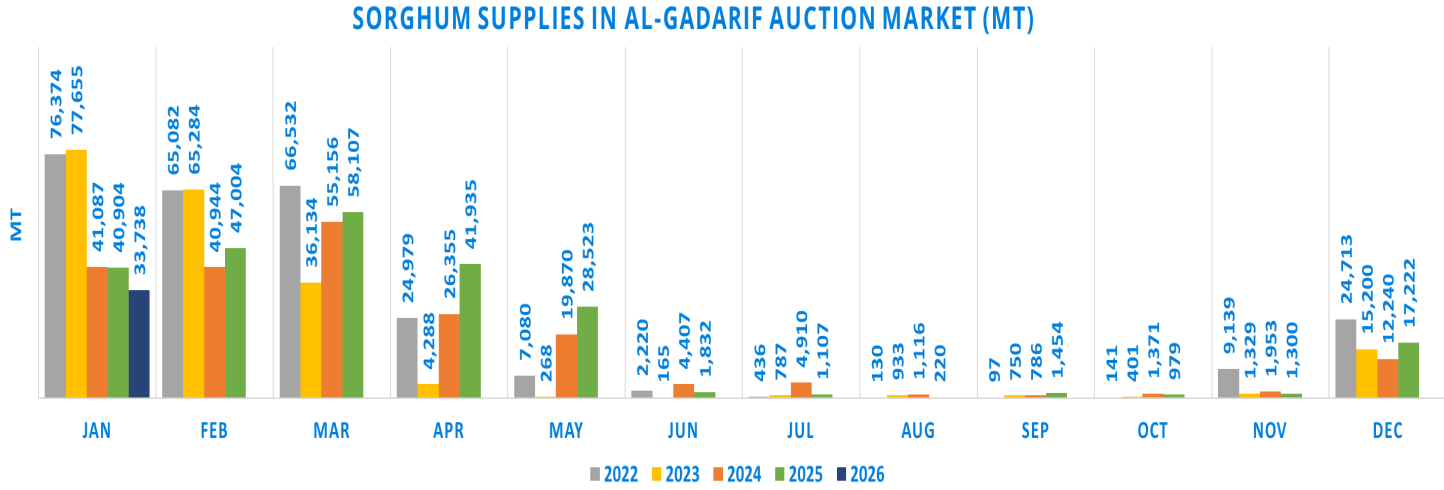
Commodity	Unit	Current	Yearly Trend	Previous Month		Previous Year	
		SDG		SDG	Variation	SDG	Variation
Sorghum	1 Kg	1,194		1,185	▲ 0.8%	1,577	▼ -24%
Wheat Flour	1 Kg	3,167		2,796	▲ 13.3%	2,419	▲ 31%
Goat/sheep	One Head	250,340		250,340	↔ 0.0%	130,641	▲ 92%
Groundnut	1 Sack (45kg)	87,680		108,585	▼ -19.3%	55,233	▲ 59%
LFB Cost	1 Unit	1,974		2,050	▼ -3.7%	1,789	▲ 10%

Sorghum Market Overview - Gadaref Auction Market

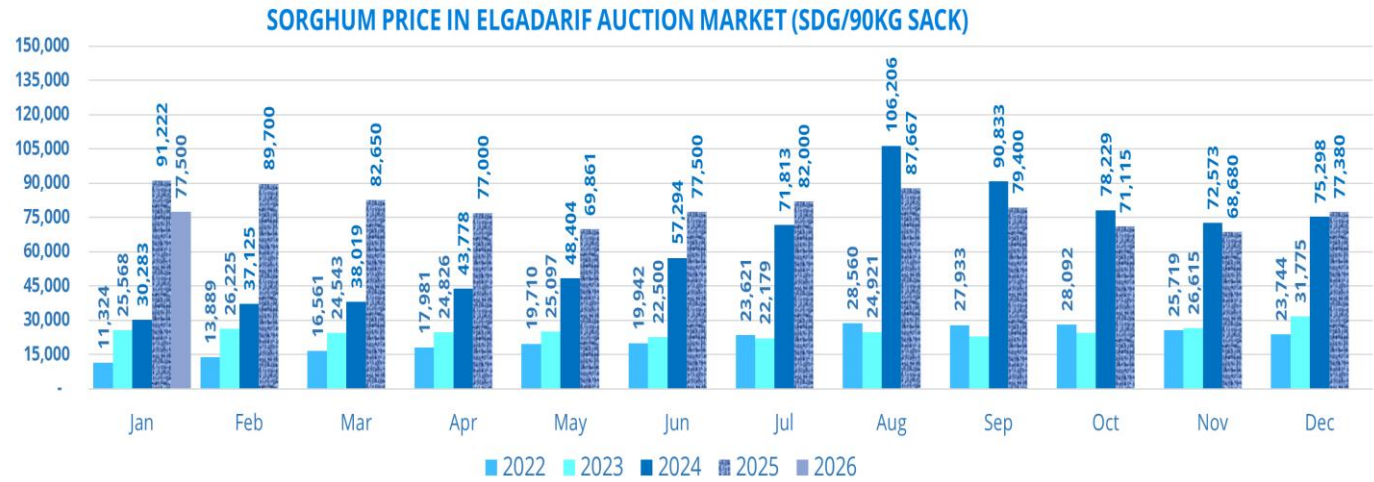
The Gadaref Auction Market remains a key reference point for assessing sorghum availability, supply dynamics, and price trends across Sudan. The main harvest supply season typically begins in mid-October and extends through early March, during which the bulk of sorghum enters the market. Between October 2025 and January 2026, total market arrivals reached 53,239 MT—slightly lower (-6%) than the same period in 2024/2025, and still 44% below the five-year average for November to January.



In the 2025/2026 season, supplies have shown signs of weakening compared with previous years, reflecting persistent structural challenges in sorghum production. These constraints are compounded by broader economic pressures. The continued devaluation of the Sudanese Pound is fueling inflation, raising production and transportation costs, and ultimately driving up prices of locally produced cereals.



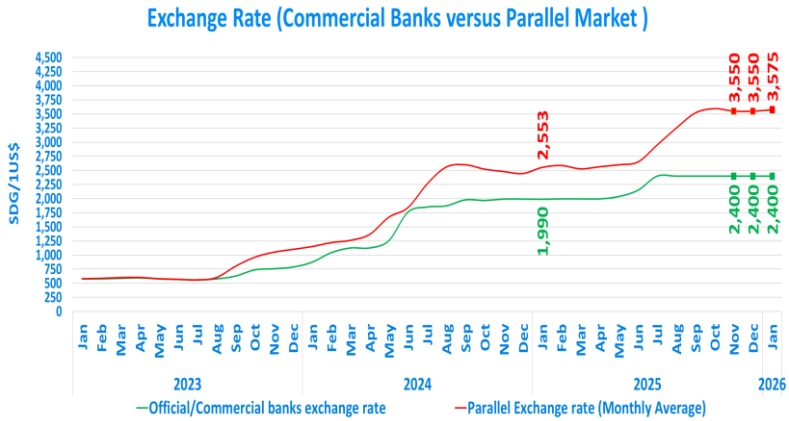
In January 2026, sorghum supplies to the Gadaref Auction Market increased sharply—up 96 percent from the previous month, Dec 2025, yet remained 18 percent lower same period last year (January 2025). Despite this strong monthly rise, volumes were still 16 percent below the five-year January average, indicating a persistent long-term decline relative to historical levels.



In January 2026, the average sorghum price at the Gadaref Auction Market remained stable compared with the previous month but stood 15 percent lower than the price recorded in January 2025. This year-on-year decline may be attributed to lower production costs for the current harvest, reduced market demand, and increased supply in January relative to the previous month.

Foreign Currency Exchange Rate

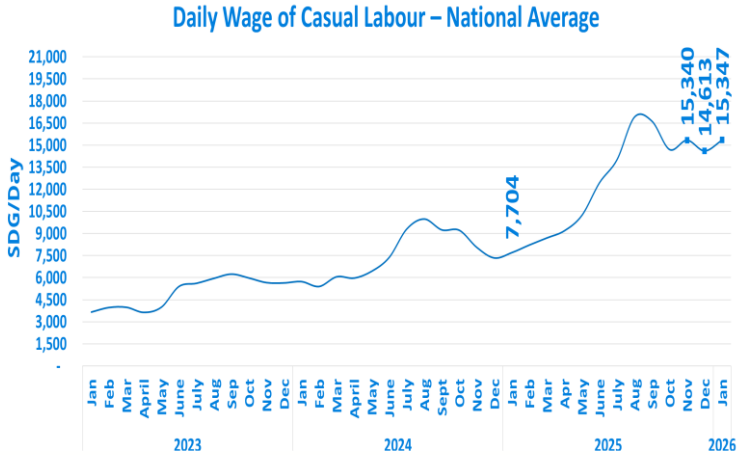
In January 2026, the Sudanese pound slightly depreciated on the parallel market, trading at 3,575 SDG/US$, a 1-percent decline compared with December, and 40 percent weaker than the rate recorded a year earlier. Commercial bank exchange rates remained broadly stable month-on-month at 2,400 SDG/US$, though still 21 percent below December 2025 levels. These movements underscore the continued volatility of Sudan's foreign exchange market, where ongoing depreciation is fueling inflation and exacerbating overall economic instability



Casual Labour Wage Rate

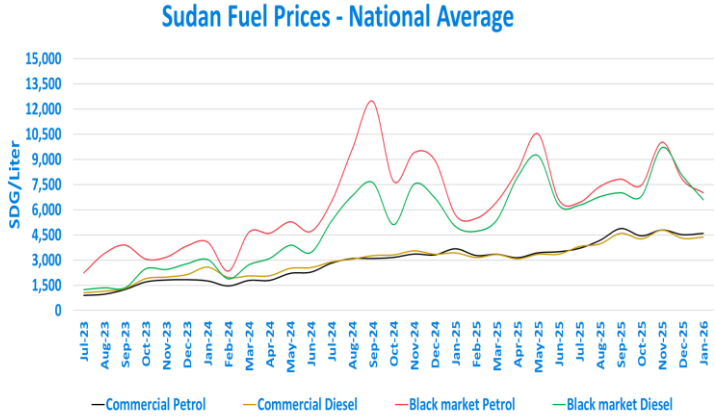
In January 2026, the average daily wage for casual labor in Sudan rose to 15,347 SDG, representing a 5-percent increase from December 2025 and standing 99 percent higher than levels recorded in January 2025. This substantial year-on-year rise reflects shifting labor market dynamics as local economies continue to adjust.

Wage disparities across states remain pronounced: River Nile reported the highest rate at 44,000 SDG/day, followed by Khartoum, Kassala, and Gezira, each exceeding 17,000 SDG/day. In contrast, North Darfur and South Darfur recorded much lower wages of around 5,000 SDG/day, underscoring weaker economic activity and more limited employment opportunities in these regions.



Fuel Prices

In January 2026, commercial fuel prices in Sudan showed mixed month-on-month trends. Petrol and diesel prices in the commercial market increased by around 2 percent, while black market prices declined by 10 percent for petrol and 18 percent for diesel. Despite this short-term ease, fuel prices in both the commercial and black markets remain more than they were a year ago. These fluctuations continue to be largely driven by the depreciation of the Sudanese pound due to shortage of foreign currency.



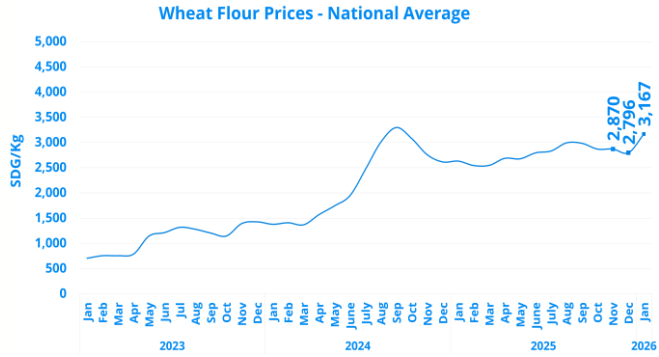
Price Developments of Basic Commodities

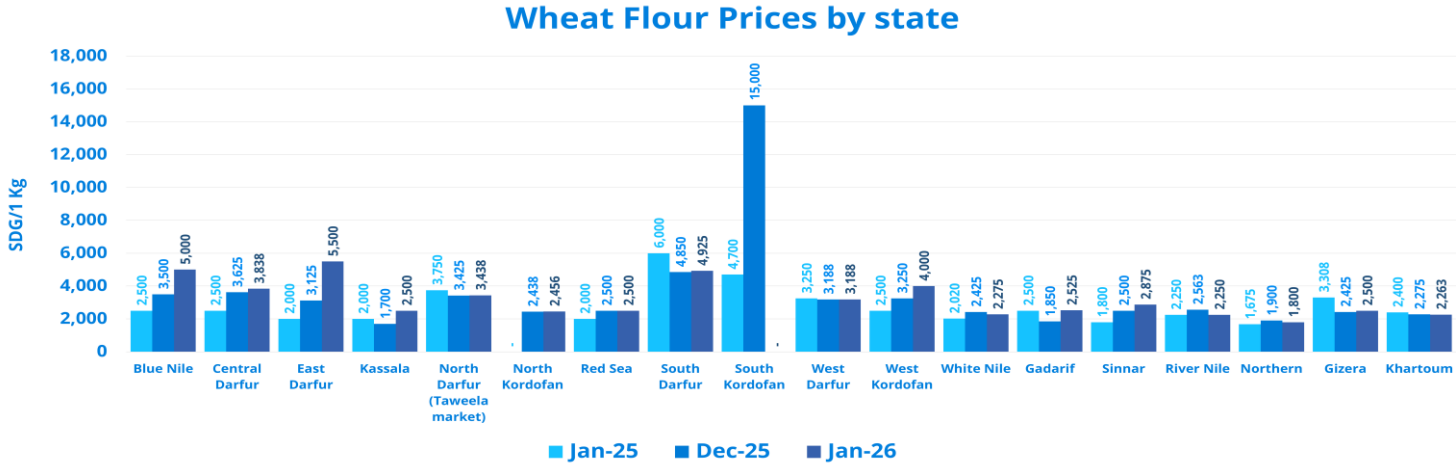
Wheat Flour

In January 2026, the national average price of wheat flour in Sudan reached 3,167 SDG per kilogram, marking a 13.2-percent increase from December 2025 and standing 20 percent higher than in January 2025.

Significant regional disparities persist. Excluding Kadugli, the highest prices were observed in East Darfur, Blue Nile, South Darfur, and West Kordofan (around 5,000 SDG/Kg). In contrast, most other regions reported prices below 3,000 SDG per kilogram.

These variations reflect differences in supply chain reliability, consumer preferences, demand patterns, and localized security conditions across states.

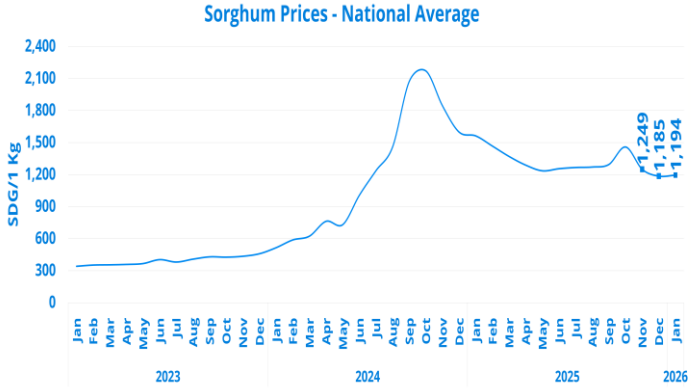


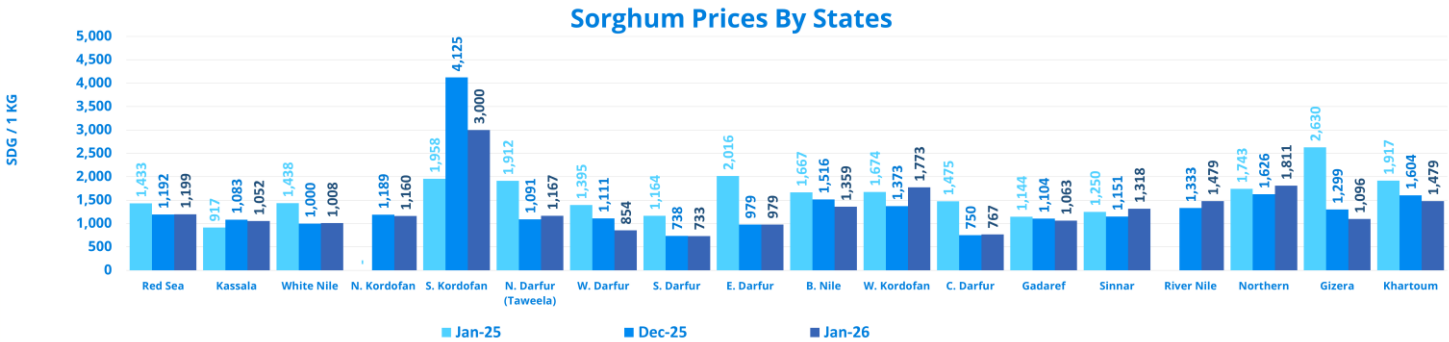


Sorghum (grain) - Feterita

In January 2026, Sudan's national average retail price of sorghum rose slightly to 1,194 SDG per kilogram compared with the previous season, a 0.8 percent increase driven by somewhat lower supplies in some regions. However, prices were 23.5 percent lower year-on-year, offering some relief amid ongoing economic pressures.

Regional disparities remain notable. The highest prices were observed in areas with ongoing conflict, particularly South Kordofan and Central Darfur, while most other states reported prices ranging between 700 and 1,100 SDG per kilogram. These variations largely reflect differences in supply chain instability, especially in insecure regions, as well as proximity to key production zones.

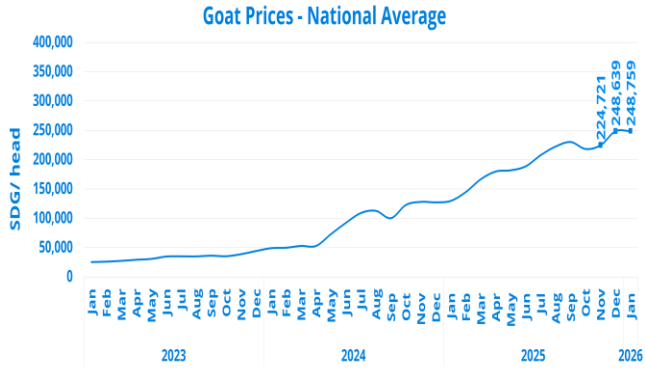


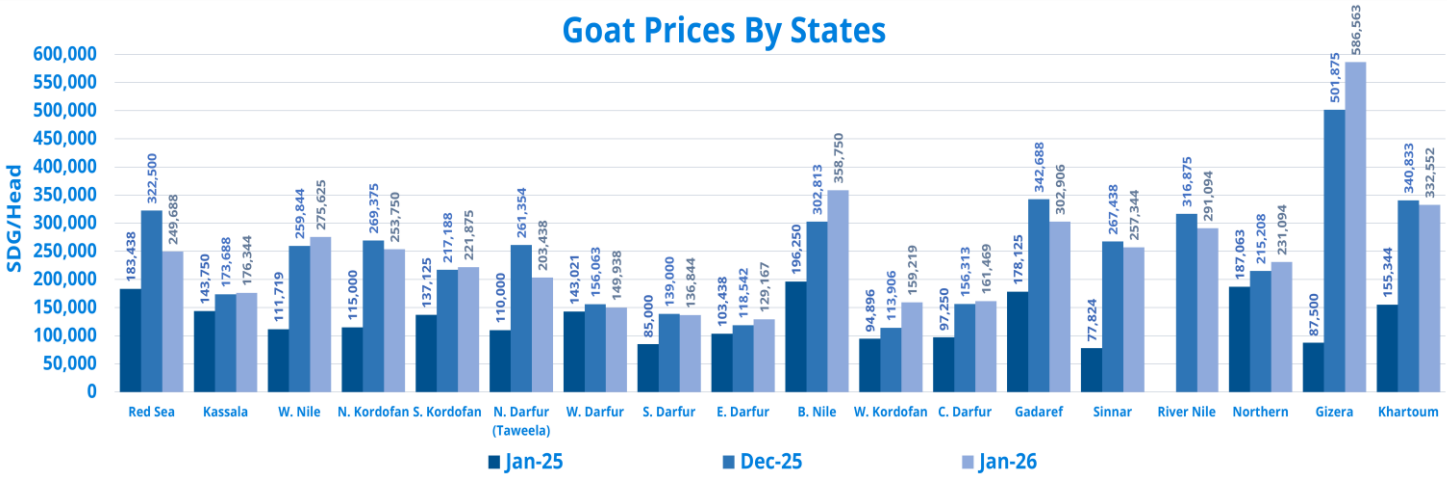


Price Developments of Basic Commodities

Goat

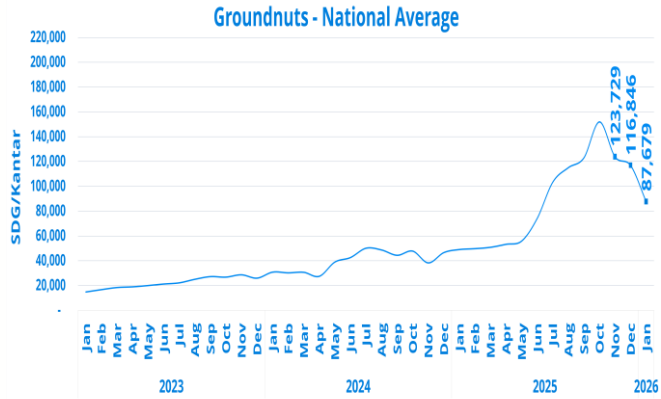
In January 2026, the national average price of goats in Sudan remained stable at around 248,759 SDG per head, representing a 92 percent increase compared to January 2025. The highest prices were reported in Gezira, followed by Blue Nile, Gadaref, and River Nile states. In contrast, most Darfur states—except North Darfur—recorded the lowest prices, ranging between 130,000 and 150,000 SDG per head. These regional disparities reflect ongoing supply chain disruptions and persistent structural challenges within the livestock market.

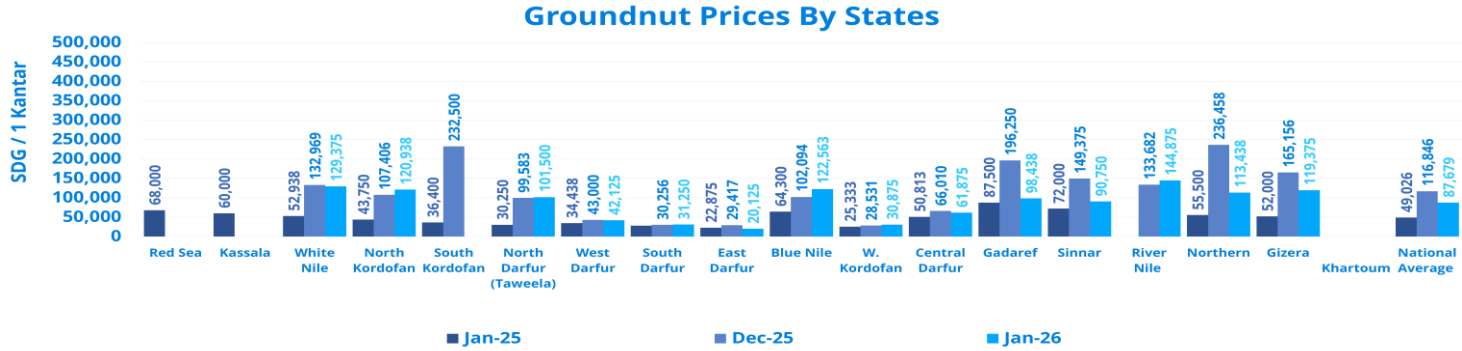




Groundnut

In January 2026, groundnut prices in Sudan averaged 87,679 SDG per kantar, reflecting a 25-percent decline from the previous month but remaining 79 percent higher than the same period last year. The month-on-month decrease is largely attributable to the harvest season and improved supplies from key production areas. Prices were highest in South Kordofan, followed by Northern and Gadaref states. In contrast, major production zones in Darfur states except North Darfur and West Kordofan recorded the lowest prices, ranging between 20,000 and 60,000 SDG per kantar. These regional differences highlight ongoing market volatility and persistent supply chain constraints across both surplus-producing and deficit areas.





Annex 1

Variations in the Prices - January 2026, December 2025 and January 2025

Table 1:Blue Nile

Commodity	Unit	Current SDG	Yearly Trend	Previous Month			Previous Year		
				SDG	Variation		SDG	Variation	
Sorghum	Kg	1,333		1,333	⇔	0%	1,667	▼	-20%
Wheat flour	Kg	5,000		3,500	▲	43%	2,500	▲	100%
Goat/sheep meat	Kg	29,500		29,500	⇔	0%	17,500	▲	69%
Groundnut oil	L	11,225		11,000	▲	2%	8,750	▲	28%
LFB cost	1 Unit	2,352		2,359	⇔	0%	2,026	▲	16%

Table 2: Kassala

Commodity	Unit	Current SDG	Yearly Trend	Previous Month			Previous Year		
				SDG	Variation		SDG	Variation	
Sorghum	Kg	1,125		1,200	▼	-6%	1,117	▲	1%
Wheat flour	Kg	2,500		1,700	▲	47%	2,000	▲	25%
Goat/sheep meat	Kg	34,000		32,000	▲	6%	25,200	▲	35%
Groundnut oil	L	12,500		14,750	▼	-15%	8,100	▲	54%
LFB cost	1 Unit	2,287		2,286	⇔	0%	1,689	▲	35%

Table 3: Gadaref

Commodity	Unit	Current SDG	Yearly Trend	Previous Month			Previous Year		
				SDG	Variation		SDG	Variation	
Sorghum	Kg	1,000		1,113	▼	-10%	1,175	▼	-15%
Wheat flour	Kg	2,525		1,850	▲	36%	2,500	▲	1%
Goat/sheep meat	Kg	31,250		32,000	▼	-2%	26,800	▲	17%
Groundnut oil	L	10,750		8,800	▲	22%	8,000	▲	34%
LFB cost	1 Unit	1,664		1,746	▼	-5%	1,821	▼	-9%

Table 4: Red Sea

Commodity	Unit	Current SDG	Yearly Trend	Previous Month			Previous Year		
				SDG	Variation		SDG	Variation	
Sorghum	Kg	1,250		1,193	▲	5%	1,200	▲	4%
Wheat flour	Kg	2,500		2,500	⇔	0%	2,000	▲	25%
Goat/sheep meat	Kg	34,750		35,250	▼	-1%	26,000	▲	34%
Groundnut oil	L	11,000		12,500	▼	-12%	7,500	▲	47%
LFB cost	1 Unit	2,169		2,295	▼	-6%	1,776	▲	22%

Table 5: South Kordofan

Commodity	Unit	Current SDG	Yearly Trend	Previous Month			Previous Year		
				SDG	Variation		SDG	Variation	
Sorghum	Kg	NA		2,666	NA		2,000	NA	
Wheat flour	Kg	NA		15,000	NA		4,700	NA	
Goat/sheep meat	Kg	NA		44,000	NA		12,800	NA	
Groundnut oil	L	NA		14,000	NA		2,900	NA	
LFB cost	1 Unit	NA		4,977	NA		2,751	NA	

Variations in the Prices - January 2026, December 2025 and January 2025

Table 6: North Kordofan

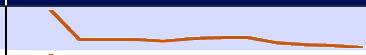
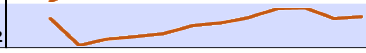
Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,141		1,170	▼ -2%	NA	NA
Wheat flour	Kg	2,456		2,438	▲ 1%	NA	NA
Goat/sheep meat	Kg	26,563		26,625	⇔ 0%	NA	NA
Groundnut oil	L	8,000		7,875	▲ 2%	NA	NA
LFB cost	1 Unit	2,192		2,174	▲ 1%	NA	NA

Table 7 White Nile

Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,000		1,000	⇔ 0%	1,333	▼ -25%
Wheat flour	Kg	2,275		2,425	▼ -6%	2,020	▲ 13%
Goat/sheep meat	Kg	31,500		30,000	▲ 5%	20,000	▲ 58%
Groundnut oil	L	10,125		9,625	▲ 5%	5,400	▲ 88%
LFB cost	1 Unit	2,309		2,315	⇔ 0%	1,835	▲ 26%

Table 8: West Kordofan

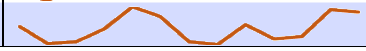
Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,900		1,750	▲ 9%	1,750	▲ 9%
Wheat flour	Kg	4,000		3,250	▲ 23%	2,500	▲ 60%
Goat/sheep meat	Kg	20,000		19,500	▲ 3%	13,500	▲ 48%
Groundnut oil	L	4,000		3,863	▲ 4%	3,050	▲ 31%
LFB cost	1 Unit	2,158		2,209	▼ -2%	1,875	▲ 15%

Table 9: West Darfur

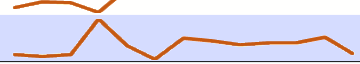
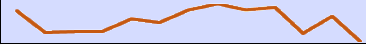
Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	854		1,111	▼ -23%	1,225	▼ -30%
Wheat flour	Kg	3,188		3,188	⇔ 0%	3,250	▼ -2%
Goat/sheep meat	Kg	15,875		17,000	▼ -7%	9,250	▲ 72%
Groundnut oil	L	6,688		7,375	▼ -9%	3,500	▲ 91%
LFB cost	1 Unit	1,567		1,817	▼ -14%	1,550	▲ 1%

Table 10: Central Darfur

Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	767		750	▼ 2%	1,475	▼ -48%
Wheat flour	Kg	3,838		3,625	▲ 6%	2,500	▲ 54%
Goat/sheep meat	Kg	16,000		15,250	▲ 5%	8,000	▲ 100%
Groundnut oil	L	4,663		6,650	▼ -30%	3,775	▲ 24%
LFB cost	1 Unit	1,423		1,662	▼ -14%	1,715	▼ -17%

Variations in the Prices – January 2026, December 2025 and January2025

Table 11: Northern State

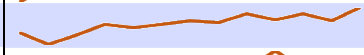
Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,700		1,775	▼ -4%	2,625	▼ -35%
Wheat flour	Kg	1,800		1,900	▼ -5%	1,675	▲ 7%
Goat/sheep meat	Kg	33,125		28,667	▲ 16%	24,250	▲ 37%
Groundnut oil	L	7,275		9,800	▼ -26%	8,500	▼ -14%
LFB cost	1 Unit	2,341		2,272	▲ 3%	2,194	▲ 7%

Table 12: River Nile

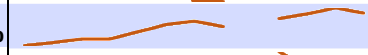
Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,000		1,000	↔ 0%	1,625	▼ -38%
Wheat flour	Kg	2,250		2,563	▼ -12%	2,250	↔ 0%
Goat/sheep meat	Kg	40,250		42,500	▼ -5%	26,500	▲ 52%
Groundnut oil	L	8,000		8,438	▼ -5%	5,750	▲ 39%
LFB cost	1 Unit	2,003		2,002	↔ 0%	1,832	▲ 9%

Table 13: North Darfur (Taweela)

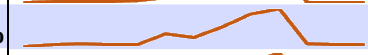
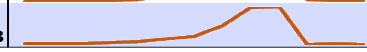
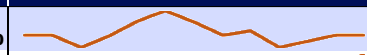
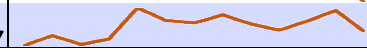
Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,037		1,292	▼ -20%	1,835	▼ -43%
Wheat flour	Kg	3,438		3,425	↔ 0%	3,750	▼ -8%
Goat/sheep meat	Kg	10,000		11,750	▼ -15%	7,000	▲ 43%
Groundnut oil	L	3,438		3,728	▼ -8%	2,465	▲ 39%
LFB cost	1 Unit	1,663		2,013	▼ -17%	2,012	▼ -17%

Table 14: South Darfur

Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,230		1,237	▼ -1%	1,200	▲ 2%
Wheat flour	Kg	4,925		4,850	▲ 2%	6,000	▼ -18%
Goat/sheep meat	Kg	14,138		14,313	▼ -1%	10,250	▲ 38%
Groundnut oil	L	4,588		4,650	▼ -1%	4,613	▼ -1%
LFB cost	1 Unit	1,812		1,832	▼ -1%	1,638	▲ 11%

Table 15: East Darfur

Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,000		1,000	↔ 0%	1,000	↔ 0%
Wheat flour	Kg	5,500		3,125	▲ 76%	2,000	▲ 175%
Goat/sheep meat	Kg	13,750		10,000	▲ 38%	7,750	▲ 77%
Groundnut oil	L	2,500		4,488	▼ -44%	3,575	▼ -30%
LFB cost	1 Unit	1,727		2,012	▼ -14%	1,532	▲ 13%

Variations in the Prices - January 2026, December 2025 and January 2025

Table 16: Khartoum

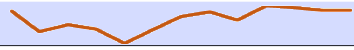
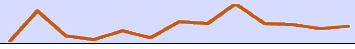
Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,500		1,500	⇔ 0%	2,000	▼ -25%
Wheat flour	Kg	2,263		2,275	▼ -1%	2,400	▼ -6%
Goat/sheep meat	Kg	27,500		26,750	▲ 3%	20,000	▲ 38%
Groundnut oil	L	10,188		11,125	▼ -8%	9,000	▲ 13%
LFB cost	1 Unit	2,022		2,021	⇔ 0%	2,005	▲ 1%

Table 17: Gizera

Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,031		1,156	▼ -11%	2,775	▼ -63%
Wheat flour	Kg	2,500		2,425	▲ 3%	3,308	▼ -24%
Goat/sheep meat	Kg	35,500		31,950	▲ 11%	12,000	▲ 196%
Groundnut oil	L	10,000		9,000	▲ 11%	7,375	▲ 36%
LFB cost	1 Unit	2,077		2,101	▼ -1%	2,469	▼ -16%

Table 18: Sinnar

Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,300		1,000	▲ 30%	1,300	⇔ 0%
Wheat flour	Kg	2,875		2,500	▲ 15%	1,800	▲ 60%
Goat/sheep meat	Kg	35,000		30,000	▲ 17%	22,000	▲ 59%
Groundnut oil	L	8,563		8,625	▼ -1%	7,000	▲ 22%
LFB cost	1 Unit	1,795		1,743	▲ 3%	1,486	▲ 21%

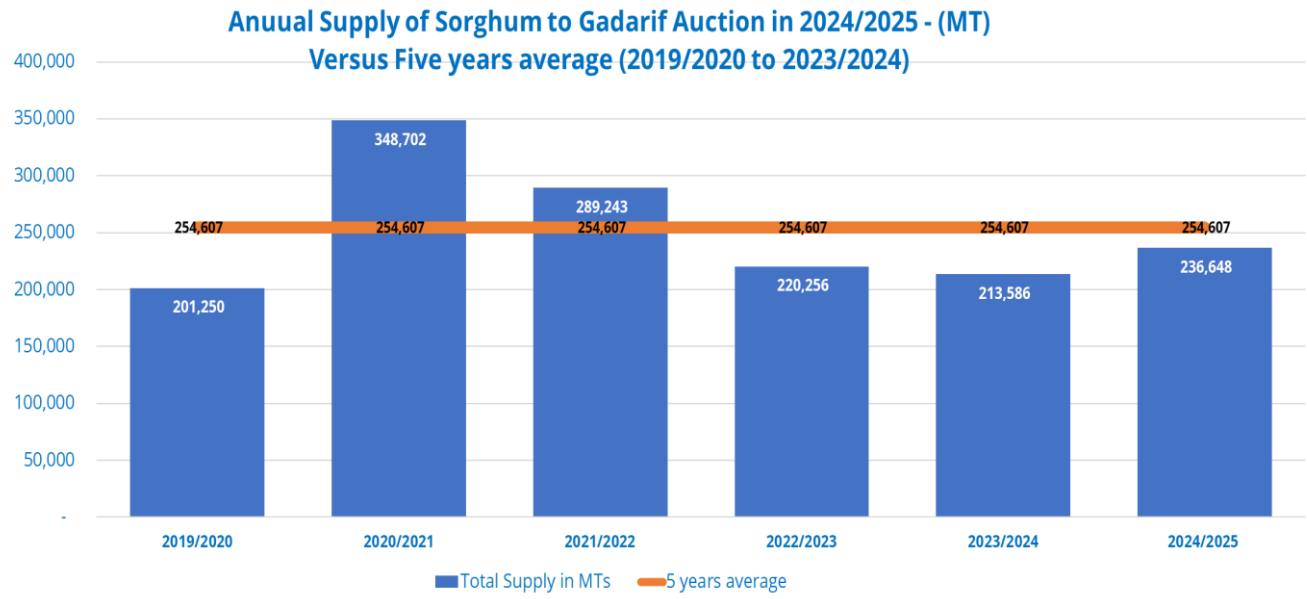
Annex 2:

Variations in the Prices of LFB - January 2026, Vs. Dec. 2025 & Jan. 2025

Table 19: CBT Items - National Average

Commodity	Unit	Current SDG	Yearly Trend	Previous Month		Previous Year	
				SDG	Variation	SDG	Variation
Sorghum	Kg	1,194		1,185	▲ 0.8%	1,577	▼ -24%
Onion	Kg	1,710		3,080	▼ -44%	2,363	▼ -28%
Vegetable oil (groundnut)	Liter	7,853		8,416	▼ -7%	6,047	▲ 30%
Cow meat	Kg	18,507		18,460	⇔ 0%	11,113	▲ 67%
Goat/sheep meat	Kg	26,394		26,503	⇔ 0%	16,988	▲ 55%
Powder milk	Kg	21,837		23,553	▼ -7%	18,913	▲ 15%
Dry tomatoes	Kg	9,745		11,054	▼ -12%	5,896	▲ 65%
Sugar	Kg	3,611		4,272	▼ -15%	3,479	▲ 4%
Pulses - fabi beans	Kg	6,987		7,645	▼ -9%	5,830	▲ 20%
Salt	Kg	2,626		3,138	▼ -16%	2,151	▲ 22%
Wheat flour	Kg	3,167		2,796	▲ 13%	2,631	▲ 20%

Annex 3: Annual Total Supply of Sorghum In AlGadarif Auction Market



Annex 4:

Terms of Trade between LFB cost and Casual labour wage, Groundnut and Goat prices - January 2026 Versus January 2025

Chart 1: Terms of trade between the LFB cost and Casual labour daily wage

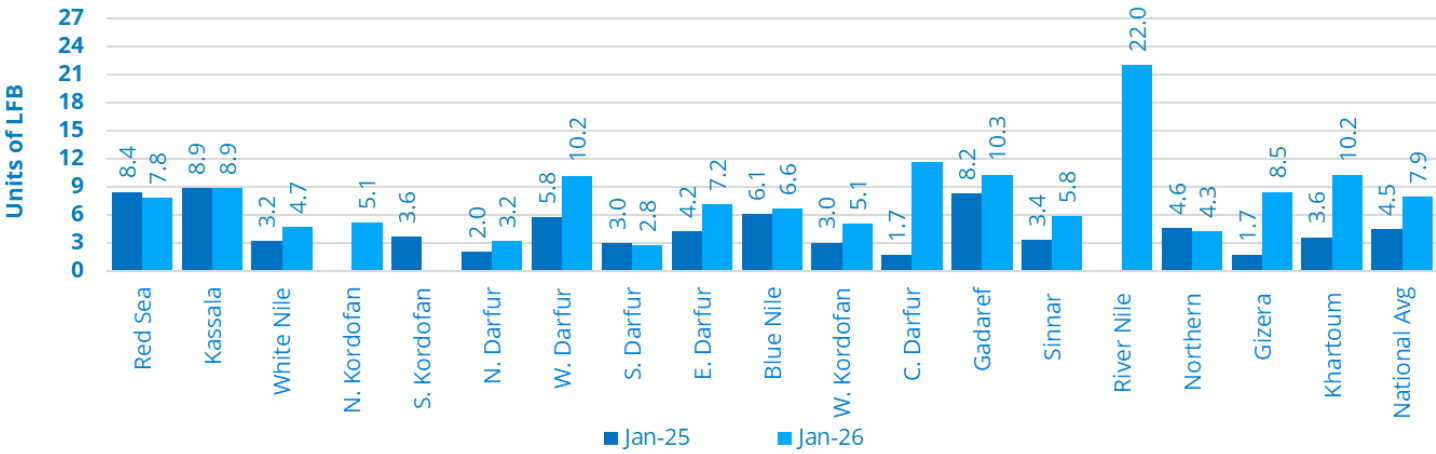


Chart 2: Terms of trade between the LFB cost and one medium size goat

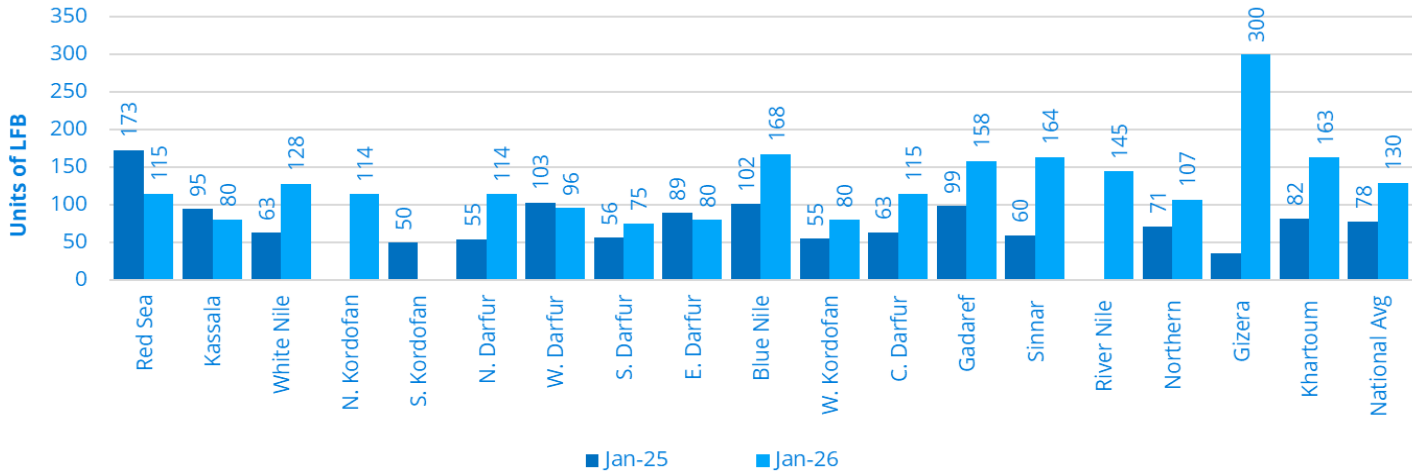
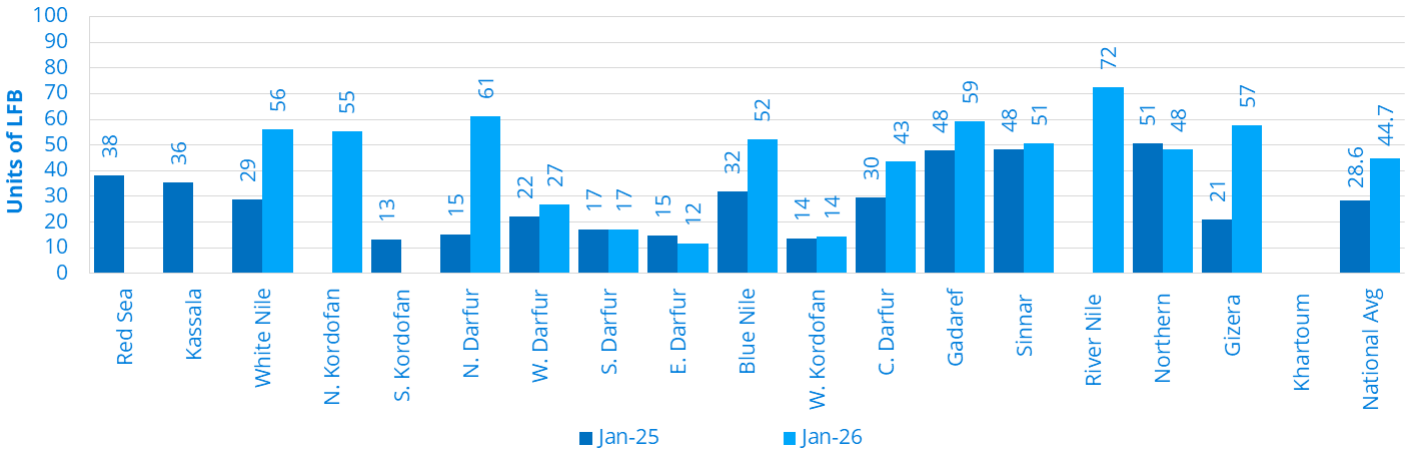


Table 3: Terms of trade between the LFB cost and one sack of groundnut (45kG)



Annex 4

[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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