

Joint Rapid Assessment of Markets (JRAM)

Khartoum state

December 2025 | Sudan

Key Messages

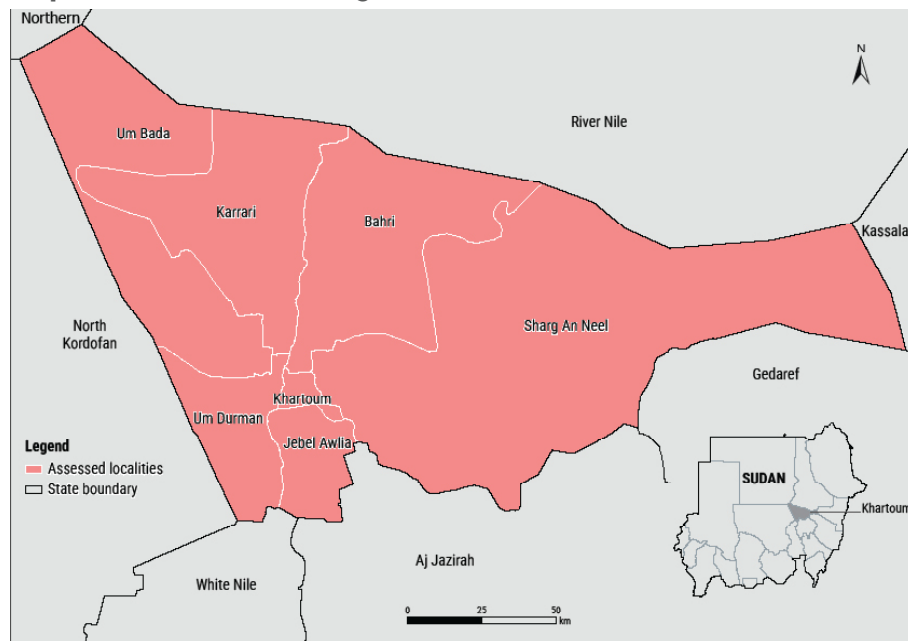
- Market access in Khartoum State was reported as possible by most assessed consumers at the time of data collection (September 2025), despite ongoing security challenges. However, some respondents in specific localities, particularly Bahri and Jebel Awlia, reported access constraints and perceived insecurity, including movement restrictions, safety concerns, and transport-related barriers.
- Most consumers reported availability of the assessed commodities, though notable gaps were reported for selected non-food items, including gas cylinders, gas refills, and water containers. While supply chains were reported to be recovering and largely intra-state, retailers in certain localities (especially Jebel Awlia) continued to report limited availability of key items, alongside challenges related to storage capacity, safety, and power instability that constrained market functionality.
- Consumers were reported to rely on informal, cash-based financial channels, with limited use of formal banking services. Although most consumers reported no barriers to accessing cash, around one quarter faced physical or financial constraints, particularly in Jebel Awlia and Khartoum, primarily linked to low or irregular income, limited cash availability, and high transaction or transport costs.

Context & Rationale

After more than two years of relentless conflict, Sudan is facing what is considered the world's largest humanitarian crisis in scale.¹ In Khartoum State, basic services have effectively collapsed after more than two years of fighting. Markets are barely functioning, and the formal banking system remains largely inaccessible, further limiting communities' coping capacities.² While access conditions improved slightly between March and May 2025, bureaucratic impediments continue to hinder relief efforts.²

REACH launched a Joint Rapid Assessment of Markets (JRAM) in Khartoum State, in order to capture the effects of conflict-related shocks to markets, and address key information gaps.

Map 1. Assessment coverage



Assessment Overview

A total of **189 key informant interviews (KIIs)** were conducted across the **seven localities in Khartoum state**, focusing on key market actors, including consumers (84), retailers (84) and wholesalers (21). The data collection took place between 29 September and 5 November 2025, and was conducted in collaboration with Acted.

Findings are indicative of the conflict-related shocks on the assessed marketplaces within the seven localities in Khartoum state. Where possible, findings should be triangulated with new information.



Market Access and Consumer Challenges: Availability, and Financial Barriers

Overall, 73 out of 84 assessed consumers across Khartoum State reported that shock-related developments did not prevent them from accessing marketplaces in the 30 days prior to data collection. A smaller share reported that shocks previously affected access but no longer do (7), notably in Khartoum (4), Jebel Awlia (2) and Bahri (1), while 3 consumers in Jebel Awlia and 1 in Um Bada reported shock-related access constraints at the time of data collection. The reported security-related access challenges include movement restrictions (2), reduced market opening hours (1), limited transportation options (1), and perceived insecurity (1), while the reported financial-related access challenges include high prices (2) and unaffordable transportation costs (2).

In parallel, 78 consumers across the state reported feeling safe accessing the market, with a minority reporting feeling unsafe in Jebel Awlia (2), Sharg An Neel (2), Um Bada (1) and Bahri (1). The reported unsafety factors include fear of robbery (4), fear of violence (3), fear of looting (2) and fear of harassment (2).

Most consumers reported that key commodities were available, with 61 consumers indicating that all 18 assessed commodities were available in their local marketplaces.. However, specific supply gaps persist, particularly for non-food items (NFIs), such as gas cylinder and refill, water container and water supply. It is also worth noting, that in Jabel Awlia a majority of consumers (8) reported unavailability of 12 key commodities, followed by Khartoum and Bahri, where consumers (5 and 3, respectively) highlighted limited availability of 7 key commodities.

Tab 1. # of consumers reporting unavailability of food and non-food items (NFIs) at the time of data collection (multiple choice)

Food items	# consumers	NFIs	# consumers
Sorghum	5	Gas cylinder	16
Tomato paste	4	Water container	9
Onions	2	Water supply	8
Goat meat (fresh)	2	Gas refill	6
Milk (fresh)	1	Body soap	2
Cow meat (fresh)	1	Tooth paste	2
Vegetable oil	0	Toothbrush	1
Sugar	0	Laundry soap	1
		Liquid dish soap	1
		Sanitary pads	0

Assessed consumers primarily access money through informal, cash-based channels (select multiple responses). Across the seven localities in Khartoum State, the most commonly reported sources were friends, family, or community members (69), followed closely by daily wages paid in cash (66). Other sources—used to varying degrees across localities—include cash salaries (32), mobile wallet

services (29), income from own businesses (15), charity or humanitarian assistance (15), and banks or ATMs (14). Overall, these patterns suggest a continued reliance on social networks and cash-in-hand income, with limited use of formal financial institutions.

22

consumers (N=84) reported **barriers accessing cash** in the 30 days before data collection.

While most consumers reported no barriers to accessing cash in the 30 days preceding data collection, approximately one quarter across the state faced physical and financial constraints, with the majority located in Jebel Awlia (9) and Khartoum (5). The most frequently cited physical challenges included limited cash availability at distribution points (9), restricted access to cash by employers or other payers (5), and reduced access to distribution facilities due to movement restrictions (3). Financial barriers were more pronounced, primarily driven by insufficient income, with many respondents reporting low account balances due to lack of work (10) and difficulty obtaining sufficient cash on hand (8). Additional physical challenges included high transportation costs (4) and limited acceptance of prepaid cards (4), highlighting not only challenges in accessing cash but also in its usability.

Figure 1. Consumers reporting challenges affecting their purchasing habits in the 30 days before data collection (select one; n=84)

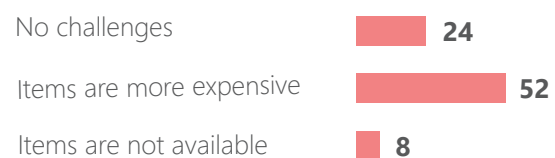
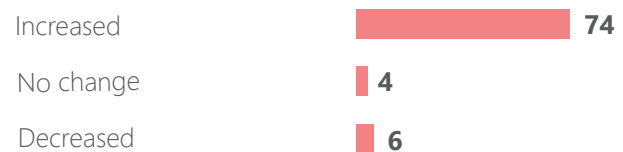


Figure 2. Consumers reporting changes in prices in the 30 days before data collection, compared to April 2025 (select one; n=84)



Market Functionality and Vendor Challenges: Supply, Demand Shifts, and Storage

In Khartoum State, consumers (24) and retailers (20) reported that more than half of vendors were operating at the time of data collection. In parallel, retailers highlighted lack of funds, reduced clients, price increase from the source and damaged facilities as the main barriers preventing them from reopening their business. Retailers also noted an improvement since April 2025, when many (21) reported that none of the vendors were operational. Retailers estimated that marketplaces host around 20 operational vendors, with an average daily flow of 23 customers per retailer over the four weeks before data collection. In parallel, wholesalers reported sourcing goods from an average of six suppliers, and supplying around 10 retailers, reflecting moderate supply chains that support ongoing, though partial, market recovery.



The majority of retailers (76) had their facilities open during the 30 days prior data collection, although only 30 reported full operability at the time of data collection. Among the 8 retailers who experienced closures, interruptions were generally short-term, lasting less than two weeks in most cases. The primary reason for retailers' closure was perceived insecurity, notably in Bahri (3). In contrast, wholesalers reported higher levels of business disruption, with 5 experiencing closures in the 30 days before data collection, 3 of which reported having been closed for almost the entire month, reflecting greater exposure to movement restrictions, infrastructural damage, and financial constraints. As a result, less than half of wholesalers (10) reported being fully operational at the time of data collection, mainly due to lack of funds (11) and reduced number of clients (10).

Across the state, more than half retailers (45) and wholesalers (17) reported an increase in supplier availability compared to April 2025, indicating strengthening supply-side linkages within markets.

Figure 3. Retailers and wholesalers reporting changes in the number of suppliers compared to April 2025

	Retailers	Wholesalers
Increased a lot	29	12
Increased a little	16	5
No change	25	3
Decreased a little	4	-
Decreased a lot	7	1

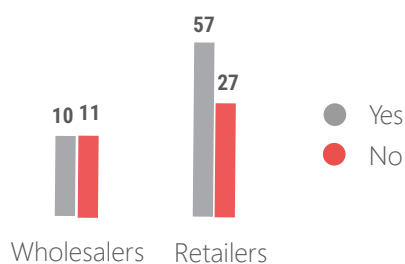
Many of the interviewed retailers in Khartoum state primarily sourced their stocks from within the state (40), with Karrari and Um Durman emerging as the main supply hubs, while 8 retailers relied on suppliers from other states, mainly Aj Jazirah and Gedaref. Similarly, wholesalers mainly source their supplies within Khartoum State (8), particularly from Um Durman, while one wholesaler in Bahri reported sourcing from River Nile state (Atbara locality), and one in Khartoum reported sourcing from Egypt. Overall, these findings indicate that market supply chains remain largely intra-state, with limited but notable reliance on inter-state and cross-border sourcing.

Tab 2. Retailers and wholesalers reporting on where they store their stock (select multiple)

	Retailers	Wholesalers
Within own facilities	79	19
Warehouse inside market	4	8
Warehouse outside market	-	1
Within own house	2	-

The majority of retailers (79) and wholesalers (19) across the state reported storing their stocks within their own facilities. A few retailers (13) highlighted facing challenges affecting their storage capacity, notably in Jebel Awlia, Khartoum and Sharg An Neel, mainly due to unsafety (9), instability of electric power (4), and damaged storage facilities (2).

Figure 4. Retailers and wholesalers offering their customers to purchase on credit



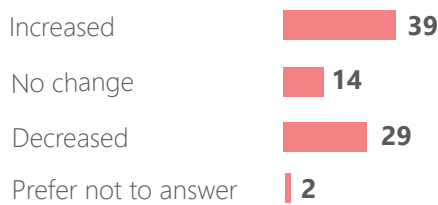
Offering credit is common among retailers (57) and less prevalent among wholesalers (10), indicating greater reliance on credit practices to support end consumers purchasing power. For both retailers and wholesalers, credit is most often extended to adult consumers (aged 18 to 59) rather than to children or older adults, and is typically limited to trusted customers.

Despite the widespread availability of credit, the proportion of consumers purchasing on credit remains limited, as most retailers (35) and wholesalers (7) estimated that only 1- 24% of their consumers do purchase on credit.



Retailers reported mixed trends in customer flow compared to April 2025. Nearly half (39) observed an increase in customer numbers over the four weeks prior to data collection, while 29 noted a decrease, and 14 saw no change. At the locality level, the majority of retailers (6) in Karrari reported a decrease in customer flow compared to April 2025.

Figure 5. Retailers reporting changes in the number of customers during the four weeks before data collection, compared to April 2025



According to vendors, adults (aged 18-59) are the most reported customers, in oppose to elderly and children age groups. In addition, many retailers (24) highlighted an increase of adult female after April 2025, while 12 wholesalers reported a decrease of adult men.

Retailers reported more frequent changes in demand for core commodities than wholesalers. Over the past month, 56 retailers observed shifts in demand, while 27 saw no change. Wholesalers, on the other hand, experienced more stable demand patterns, with only 8 reporting changes and 13 noting no variation. Notably, increased demand for staple and fresh food items was more commonly reported by wholesalers, while decreases in demand were mostly observed for non-food items.

Both retailers and wholesalers were generally able to meet increased demand for food and non-food items, though challenges varied. Retailers (35) and wholesalers (6) reported being able to respond to higher food demand, while 12 retailers and 3 wholesalers managed to meet the demand for non-food items. For food items, the main challenges were supply and access-related. Retailers struggled with stock shortages and limited purchasing capacity, while wholesalers faced transport disruptions, infrastructure damage, and movement restrictions. In contrast, barriers to responding to increased demand for non-food items were less frequent and typically related to infrastructure and access—especially for wholesalers. Retailers, however, faced more localized issues, such as capacity limitations and storage constraints.



Methodology Overview

The JRAM was conducted in collaboration between REACH and Acted in the main marketplaces across all seven localities of Khartoum state (Bahri, Jebel Awlia, Karrari, Khartoum, Sharg An Neel, Um Bada and Um Durman), between 29 September and 5 November 2025. The assessment aimed at capturing the effects of conflict-related shocks on markets, in order to provide a more holistic evidence base for cash and voucher assistance (CVA) programming.

The JRAM utilized a methodology involving key informant interviews (KIIs), with purposive sampling of three basic actors of the market system:

- **Wholesalers:** An entity or individual who supplies 3 or more other vendors with products/goods; does not necessarily have to be in the marketplace but should, at minimum, supply the market area.
- **Retailers:** An entity or individual who supplies the consumers with products/goods; does not make the most of their money reselling to other vendors, but must be located in the market area.

- **Consumers:** Consumers of end products/goods who access the shops in the designated marketplace to purchase food and non-food items essential to the maintenance of a healthy and dignified life.

Respondents were identified and interviewed in the main marketplaces across the 7 localities of Khartoum state, for a total of 84 consumers, 84 retailers and 21 wholesalers (12 consumers, 12 retailers and 3 wholesalers per locality).

The assessed commodities included 8 food items (sorghum, onions, dried tomato, fresh goat meat, fresh cow meat, fresh milk, vegetable oil, and sugar) and 10 non-food items (NFIs) (gas cylinder, gas refill, water container, water supply, body soap, laundry soap, liquid dish soap, toothpaste, tooth brush, and sanitary pads), in line with the set of key commodities included in the Minimum Expenditure Basket (MEB), as defined by the Sudan Cash Working Group (CWG).

Findings are not generalisable with a known level of precision and should be considered indicative of the conflict-related shocks in the assessed marketplaces, at locality and state level (Khartoum).

Endnotes

¹ [Sudan, 'the most devastating humanitarian and displacement crisis in the world' | UN News](#)

² [Khartoum Operational Response Planning | Sudan Operational Response Plan 2025 | Humanitarian Action](#)

ABOUT REACH

REACH Initiative facilitates the development of information tools and products that enhance the capacity of aid actors to make evidence-based decisions in emergency, recovery and development contexts. The methodologies used by REACH include primary data collection and in-depth analysis, and all activities are conducted through inter-agency aid coordination mechanisms. REACH is a joint initiative of IMPACT Initiatives, ACTED and the United Nations Institute for Training and Research - Operational Satellite Applications Programme (UNITAR-UNOSAT).

