Comparative Price Trends in Darfur and Greater Kordofan (July-December 2025)

January 2026 | Sudan

Context & Rationale

Sudan is facing one of the world's most severe humanitarian crises following the eruption of conflict between the Sudanese Armed Forces (SAF) and the Rapid Support Forces (RSF) in April 2023. The fighting has expanded across Khartoum, Darfur, and the Kordofans, disrupting infrastructure, trade flows, and basic services. As of 2026, an estimated 33.7 million people, nearly two-thirds of Sudan's population, are projected to require humanitarian assistance.[1]

The analysis is based on six consecutive months of JMMI data collected throughout Darfur and Greater Kordofan from July to December 2025 to understand market dynamics across Minimum Expenditure Basket (MEB) items prices, availability, and supply chains.

Darfur (North Darfur, West Darfur, East Darfur, South Darfur and Central Darfur) continues to face some of the most severe violence, displacement, and access constraints, with repeated attacks and famine-level conditions in parts of North Darfur affecting trade flows and market stability.[2]

Greater Kordofan (North Kordofan, West Kordofan, South Kordofan) has become a major conflict flashpoint, with active fighting, sieges, and disrupted transport corridors linking El Obeid, Kadugli, and surrounding towns; these states also serve as key supply routes to Darfur and other States, such as Khartoum, meaning disruptions have national impacts.[3,4]

The analysis aims to;

- Track price developments for essential commodities, including month-to-month variation and overall trends;
- Identify which key commodities are available in monitored markets and how their availability has changed over the last six months; and
- Analyze supply chain dynamics by examining where wholesalers source their goods and how these patterns shift.

Key Messages

- **Markets in Darfur and Greater Kordofan remain highly unstable, with prices influenced primarily by conflict, access constraints, and supply-chain disruptions rather than seasonality.** In Darfur, prolonged insecurity and reliance on long-distance supply routes have sustained high volatility even during the productive season, while in Greater Kordofan, disruptions along key transport corridors have similarly limited price stabilization.
- **Across both regions, vegetables (onions, tomatoes), staple foods (sorghum), and fuel- and water-related NFIs show the largest and most volatile month-on-month price movements.** In Darfur and similarly in Greater Kordofan extreme volatility in these items % to **market stress** in the assessed localities in both regions, driven by insecurity, fuel shortage, and high transaction costs.
- **Darfur and Greater Kordofan differ in sourcing profiles and availability dynamics but share a strong dependence on national and cross-border supply routes with limited local production.** This structural feature increases exposure to route disruptions and price shocks, particularly in conflict-affected areas.
- **The wide variations in prices, volatility, and availability across regions highlight the need for region-specific transfer values that reflect actual market conditions.** These differences also reinforce the importance of closely tracking highly volatile commodities to safeguard the effectiveness of cash assistance. Sustained, granular regional market monitoring, including supply-source information, is essential to ensure that cash responses remain timely, appropriate, and responsive to rapidly shifting market realities.

Coverage Map

Glossary

Month-on-Month
The percentage change in the median price of a commodity between one month and the next. It is useful for identifying sudden increases or decreases that may reflect temporary disruptions, seasonal effects, or short-lived market corrections.

$$MoM\ Change\ (\%) = \left(\frac{P_m - P_{m-1}}{P_{m-1}}\right) \times 100$$

Six-Month Trend (Cumulative Change)
The total percentage change in MEB price over a six-month period. This represents longer-term, structural inflation or deflation, smoothing out short spikes and showing whether markets are becoming progressively more expensive or more stable over time.

$$Six\text{-}Month\ Change\ (\%) = \left(\frac{P_{final} - P_{initial}}{P_{initial}}\right) \times 100$$

Price Dispersion
It measures how much prices vary within the same month across all reporting vendors for a given commodity. It indicates the degree of price consistency in local markets during that month.
High dispersion → vendor prices differ widely in the same month
Low dispersion → prices are relatively uniform

$$Price\ Dispersion\ (\%) = \left(\frac{Standard\ Deviation}{Median\ Price}\right) \times 100$$

Volatility
It measures how much prices change from one month to the next for a given commodity. It indicates the level of stability or volatility in monthly price movements over time.

$$Volatility\ (\%) = Volatility\ (t-1 \rightarrow t) = SD(MoM\ Change)$$

Commodity Availability
A measure of the physical presence of a commodity across vendors in a given month. It does not reflect affordability. The categories are “Widely available”, “Limited availability”, and “Completely unavailable”.

Supply Source (Local, National, Cross-Border)
Indicates where vendors obtain their goods per category. It represents vendor sourcing patterns, not volume or trade flow quantities.
Local Supply: Goods sourced within the same town or nearby localities.
National Supply: Goods sourced from elsewhere inside Sudan.
Cross-Border Supply: Goods sourced from neighbouring countries through border trade routes.

List of items covered by the analysis

Food Items
Vegetable Oil
Sugar
Sorghum
Milk (fresh)
Onion
Dried tomatoes
Cow meat (fresh)
Goat meat (fresh)

Household and Hygiene NFIs
Gas cylinder (LPG)
Gas refill (LPG)
Water supply
Water container
Body soap
Sanitary pads
Liquid dish soap
Laundry soap
Toothbrush
Toothpaste

Darfur Region

Between July and December 2025, market functionality across Darfur was shaped by persistent insecurity, episodic sieges, and restricted movement, with severity varying by locality. Covered markets in Al Fasher, Kutum, Tawila (North Darfur); Nyala Shimal, Nyala Janoub, Beliel, Kas, Ed Al Fursan (South Darfur); Ag Geneina, Kereneik, Kulbus, Jebel Moon (West Darfur); Ad Du'ayn, Abu Karinka, Bahr Al Arab, Yassin (East Darfur); and Zalingi, Mukjar, Gharb and Wasat Jabal Marrah (Central Darfur) were repeatedly affected by road closures, armed clashes, and disrupted trade corridors.[5]

Urban centres such as Al Fasher, Nyala, and Ag Geneina, which typically depend on inflows from surrounding rural areas and national supply routes, experienced intermittent isolation, while more remote localities such as Jebel Moon, Gharb Jabal Marrah, and Um Dukhun faced chronic access constraints.[6] These conditions slowed trader mobility, reduced market competition, and increased transaction costs, which may explain elevated price dispersion even when commodities were nominally available. This fragmented security environment may partly explain why seasonal production gains did not translate into sustained price stabilization across the monitored period.

Market outcomes over this period reflect the interaction between these access constraints and a supply structure. JMMI data indicate that approximately 57% of vendors primarily rely on national supply routes and 29% on cross-border sourcing, while only about 15% depend on local production. With roughly 85% of vendors dependent on non-local sources, transport disruptions, fuel shortages, and trade restrictions may be transmitted relatively quickly into price and availability changes, particularly in localities distant from production areas.

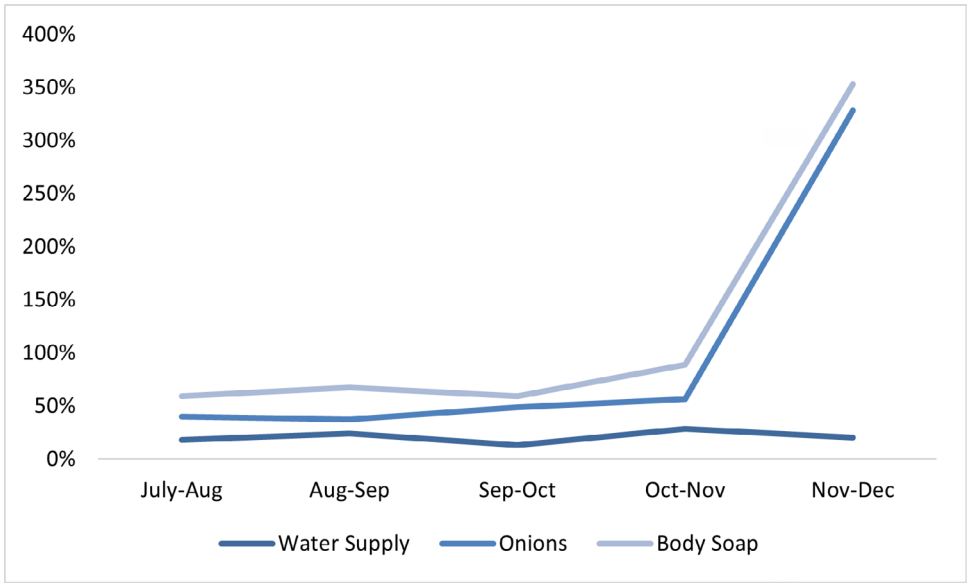
Conflict and displacement have restricted movement and trade across Darfur, limiting markets' ability to absorb seasonal supply increases and contributing to atypically high prices outside normal harvest patterns.[7] Liquidity shortages among traders and increased risk premiums for transport and commercial transactions may have constrained restocking and raised prices, especially for goods dependent on national and cross-border flow.[8]

Price Movement, Price Dispersion, Volatility and Availability of Commodities

During the lean season (July–September), these structural pressures coincided with simultaneous price increases and availability declines for several commodities. Sorghum prices increased by 21% between July and August and by 2% between August and September, while wide availability declined by 12% in July–August before increasing by 13% in August–September as early harvest inflows entered markets. Over six months, sorghum prices declined by 9% and wide availability declined by 2%, yet dispersion increased from 17% to 46%. Sorghum recorded high volatility in several months, including 25% in August–September, 22% in September–October, and 27% in November–December

The sharp decline in sorghum prices between September and October (–30%) suggests localized harvest inflows; however, the absence of sustained stabilization may be explained by restricted trade flows, limited trader liquidity, and continued reliance on national supply routes (57%), which may have limited the durability of seasonal price relief.

Figure 1: Price Volatility for Key Items in Darfur region. (%)



Vegetables showed the strongest interaction between seasonality and access constraints. Onion prices increased by 23% between August and September, by 11% between October and November, and by 70% between November and December, resulting in a six-month increase of about 200%. Onion price dispersion ranged from 69% to 119%, with an additional spike of 115% in December while the month to month volatility of the onion recorded a massive 308% volatility in November-December. Wide availability declined by 9% in July–August before increasing by 17% in August–September, and six-month wide availability increased by 8%. Tomato prices declined by 22% between September and October but increased by 23% between October and November, with a six-month increase of 12% and price dispersion rising to 97% and high volatility ranging between 21% and 51% across all months.

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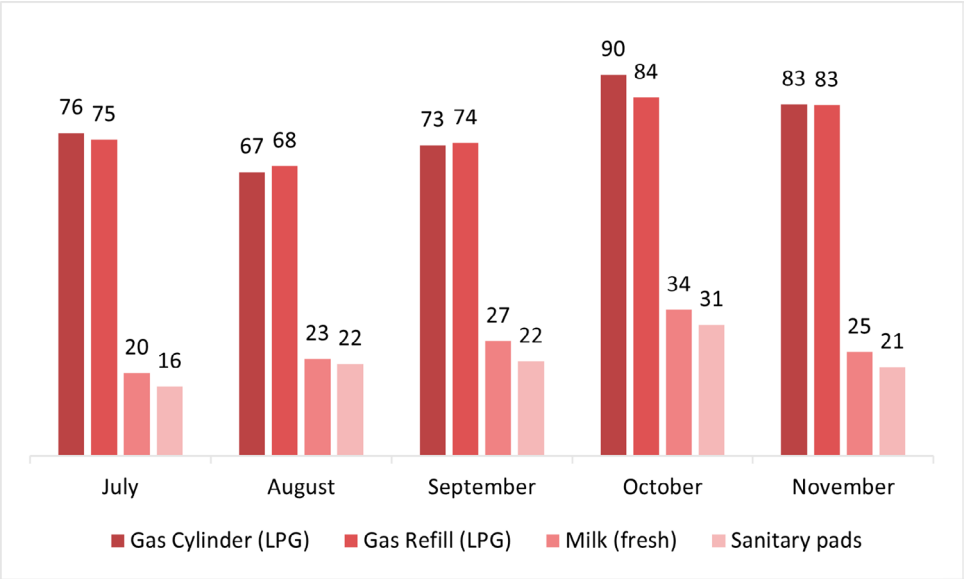
Given that about 85% of vendors rely on national or cross-border sourcing, elevated volatility and late-year price increases may be explained by transport risks, intermittent isolation of urban centres, and higher transaction costs, which may have limited the capacity of markets to smooth harvest-related supply gains.
Milk prices declined by 29% between July and August and by 13% between August and September, before increasing by 30% between October and November and by 15% between November and December, resulting in a six-month increase of 33%. Price dispersion declined from 26% to 9% toward the end of the period, which may suggest partial stabilization. However, the volatility for milk was high in June-July reaching 60% to witness an increase in July-August by 22%, and rising again to 34% and 36% in the final months. Milk's wide availability remained between 40% and 50%, and "completely unavailable" reached 34% in October. In a context of slowed trader mobility and fragmented trade corridors, dairy distribution may have been intermittently disrupted, which may explain inconsistent availability despite seasonal production cycles.

Meat prices remained relatively stable over six months, with cow meat declining by 10% and goat meat recording 0% net change. Wide availability generally ranged between 65% and 95%, although cow meat declined to 69% in August. However, volatility rises sharply to 22% in July-August and remains high at 17% in November-December.

Figure 2: Top items reported as completely unavailable in Darfur region July-December 2025 (%)



Non-food items reflected similar patterns. Laundry soap prices increased by 30%, toothbrush prices by 38%, and toothpaste by 13% over six months. Hygiene items frequently recorded price dispersion above 30–40%, with body soap declining by 17% between October and November before increasing by 25% between November and December, and sanitary pad prices declining by 16% between September and October before increasing by 19% between November and December. Body soap, laundry soap, liquid dish soap, and toothpaste all show recurring volatility spikes, with levels often exceeding 20–30%, and in some months surpassing 30%. Liquid dish soap in particular records sharp increases, including 29% in August–September and 30% in November–December.

Six-month wide availability increased by 28% for sanitary pads. Given that these goods are largely sourced through national and cross-border trade (about 85% combined), irregular restocking linked to road closures, insecurity, and higher transport costs may have contributed to recurring price increases despite generally high physical presence in markets.

Water-related items showed pronounced sensitivity to fuel and infrastructure conditions. Water supply prices increased by 35% between July and August and by 65% between October and November, with price dispersion peaking at 118%. Water container price dispersion ranged between 55% and 122% and wide availability averaged below 55% until December. Water supply volatility fluctuated between 13% and 40%, peaking at 40% in June–July and remaining elevated through the semester. Over six months, water supply wide availability increased by 22%. Because water trucking and container distribution depend on fuel access and secure corridors, repeated road closures and insecurity may have amplified price transmission and contributed to intermittent availability even when goods were nominally present.

Energy-related items remained the most constrained. Gas cylinder (LPG) (LPG) prices declined by 72% over six months, while price dispersion reached 151%. "Completely unavailable" exceeded 70–90% in most months, it is important to note that gas is not widely used in Darfur as most household rely on wood and charcoal as their fuel.[9]
In a setting where energy products rely heavily on national distribution systems, intermittent isolation of urban centres and chronic access constraints in remote areas may have resulted in irregular market presence.

MEB Volatility in Darfur region

The volatility of the MEB components in Darfur from July to December 2025 reflects a pattern of recurrent but uneven market instability, with different commodities experiencing pressure at different times. Household NFIs emerge as the most unstable component throughout the period. They begin at an elevated 24% volatility in July–August, fall briefly to 5% in August–September, and then surge again to 16% in September–October and 17% in November–December. These repeated spikes indicate

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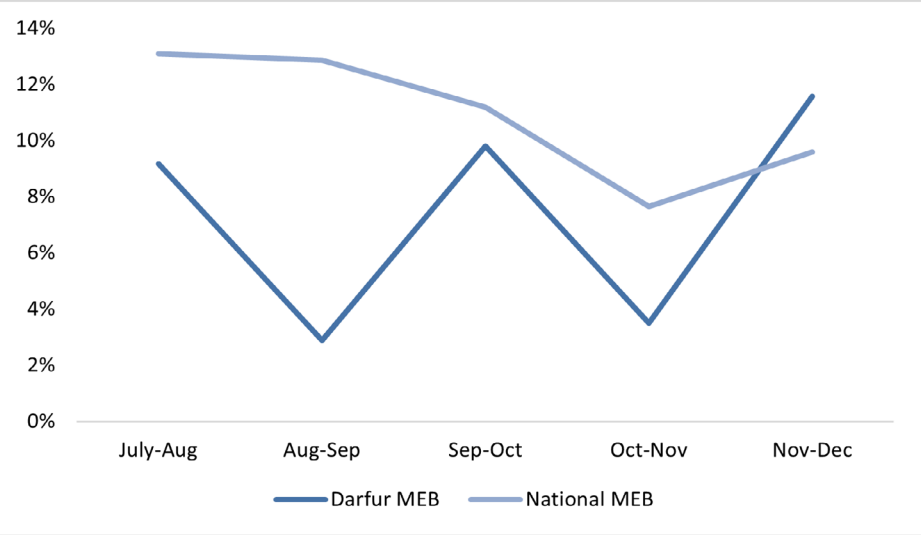
sustained sensitivity of household-related goods to disruptions in availability, supply chains, or purchasing power.

Figure 3: MEB Volatility in Darfur region vs National (%)



In contrast, food items begin the period relatively stable, with volatility at 5% in July–August and 9% in August–September. However, food markets become increasingly unstable later in the year. Volatility reaches 17% in September–October and peaks at 20% in November–December. This late-year escalation highlights growing pressures in food supply, likely linked to seasonal shortages, transport constraints, economic shocks, or currency effects.

Hygiene NFIs display one of the sharpest single-period shocks. Their volatility jumps to 20% in August–September, marking the highest mid-period increase among all components. Although the category stabilizes afterward, falling to 8% in September–October and then settling at 13% and 11% in the last two periods, it still reflects a sector vulnerable to sudden and substantial price swings.

Despite pronounced volatility within individual components, the MEB Total remains significantly more stable overall. It records 10% volatility in July–August, declines to 3% in August–September, and rises moderately to 10% in September–October before ending the year at 12%. This relatively smooth trajectory shows that fluctuations in one sector were often offset by steadier conditions in others. However, the gradual upward shift toward the end of the year indicates that rising instability in food items and household NFIs eventually exerted pressure on the total basket. Although the MEB Total appears moderately stable, households would have experienced substantial stress due to the repeated and often abrupt price swings within specific essential components.

Greater Kordofan Region

Between July and December 2025, market functionality across Greater Kordofan was shaped by persistent insecurity, localized confrontations, and intermittent access constraints, with severity varying across South, North, and West Kordofan.[10] Markets in Kadugli, Dilling, Heiban, Delami, Abu Jubayhah, Um Durein, Ar Rashad, and Habila (South Kordofan); Sheikan, Um Rawaba, Ar Rahad, Soudari, and Um Dam Haj Ahmed (North Kordofan); and As Salam, Ghubaish, and As Sunut (West Kordofan) were repeatedly exposed to corridor disruptions, armed presence, and rising transport risks.

Urban and semi-urban hubs such as Kadugli, Dilling, Sheikan, and Ar Rahad experienced periodic isolation due to insecurity along feeder roads and national highways, while more remote and conflict-affected areas, particularly Heiban, Delami, Habila, Ghubaish, and As Sunut, faced chronic mobility restrictions that reduced trader access and slowed market replenishment. These constraints weakened market competition, raised transaction costs, and contributed to elevated price volatility even when commodities remained physically present.[11] As a result, seasonal production gains did not translate into stable price behaviour, echoing the broader pattern of fragmented supply flows across the region.

Price Movement, Price Dispersion, Volatility and Availability of Commodities

Market outcomes over this period reflect the interaction between these security-related disruptions and a supply structure that is largely external to local production zones. An estimated 46% of vendors primarily rely on national supply systems, 37% on cross-border flows, and only 15% depend on local production. With roughly 85% of traders sourcing goods from outside their immediate areas, interruptions in national corridors, fuel shortages, and border-related delays were transmitted into price and availability fluctuations. Reduced liquidity among traders and heightened transport risk premiums further constrained restocking cycles and likely intensified price spikes, especially for items dependent on longer-distance supply chains.

During the lean season (July–September), these structural pressures produced simultaneous price instability and availability declines. Sorghum prices decreased by about 3% between July and August and by 10% between August and September, but availability fell by 6% in July–August before increasing by 9% in August–September as early harvest stocks entered accessible markets. Despite these short-term reversals, sorghum registered a six-month decline of about 12% while wide availability increased by 25%, although price dispersion still rose sharply from 17% to more than 45%, and volatility reached 25% in October-November, indicating unstable supply even when prices moved downward. The sharp month-on-month rebound in sorghum prices of more than 14% between September and October suggests that localized harvest inflows in some areas did not offset broader access constraints across others, especially

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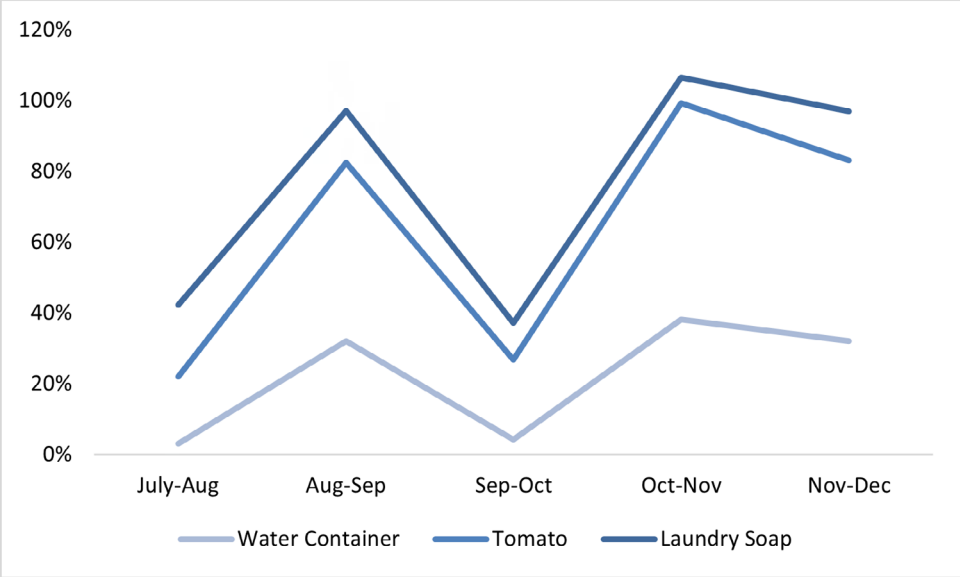
where dependence on national and cross-border routes remained high with main trader routes witnessing insecurity along west and south, and part of north Kordofan.[12]

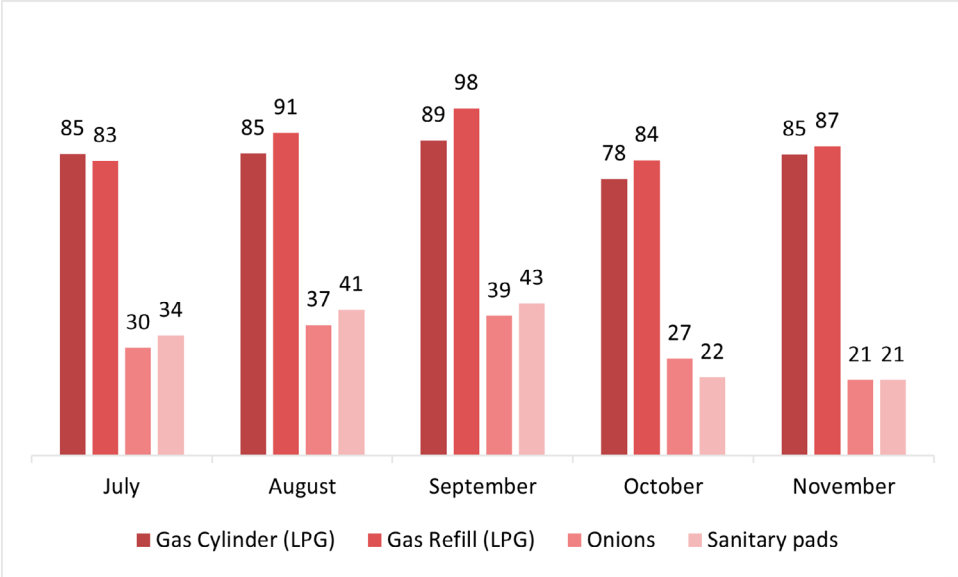
Figure 4: Price Volatility for Key Items in Greater Kordofan region. (%)



Vegetables showed the strongest interaction between seasonality and access disruptions. Onion prices fell by around 46% in July–August, then rose by more than 24% in September–October and continued climbing into the productive season. Their six-month increase of nearly 200% and price dispersion ranging from approximately 70% to 115% indicate repeated supply interruptions while volatility reached 69% in July-August decreasing to 7% in August-October to increase again to 25% in November-December. Month-on-month availability also fluctuated, declining by 6.6 % in July–August before increasing by 17 % in August–September, resulting in a six-month gain of 8 %. Tomatoes followed the same pattern: prices declined by nearly 29% in July–August before increasing by about 20% in August–September, continued to fluctuate during the harvest period, and accumulated more than 300% price increase over six months. Price dispersion rose to 97%, suggesting that insecurity and transport disruptions prevented markets from absorbing seasonal supply gains even during peak production months.[13]

Animal-source foods showed mixed behaviour. Milk prices fell by 29% between July and August and by 13% between August and September before rising sharply by 30% between October and November and by 15% between November and December, producing a six-month increase of 33%. Price dispersion declined from 26% to 9% toward the end of the year while volatility was particularly high in August-September reaching 32%, but availability remained weak, fluctuating between 40% and 50%, with "completely unavailable" reaching 34% in October. Cow meat and goat meat remained relatively stable, with cow meat declining by 10% over six months and goat meat showing no net change. Wide availability increased sharply, especially for cow meat which rose from 59% to 100%, and goat meat from 50% to 83%.

Figure 5: Top items reported as completely unavailable in Greater Kordofan region July-December 2025 (%)



Non-food items exhibited similar irregularity. Laundry soap increased by 30% over six months, toothbrushes by 38%, and toothpaste by 13%. Hygiene items recorded price dispersion commonly above 30–40%, with body soap falling by 17% between October and November before rising by 25% between November and December. Sanitary pads declined by 16% in September–October before rising by 19% in November–December, contributing to a six-month availability increase of 28%.

Water-related commodities were highly sensitive to fuel availability and corridor insecurity. Water supply prices rose by 35% in July–August and by 65% in October–November, with price dispersion peaking at 118% and a volatility of 69% in September-October . Water container price dispersion ranged between 55% and 122%, and wide availability remained below 55% until December. Over six months, water supply availability increased by 22%, but persistent interim shortages suggest that fuel constraints and insecure road conditions repeatedly disrupted both water trucking and distribution.

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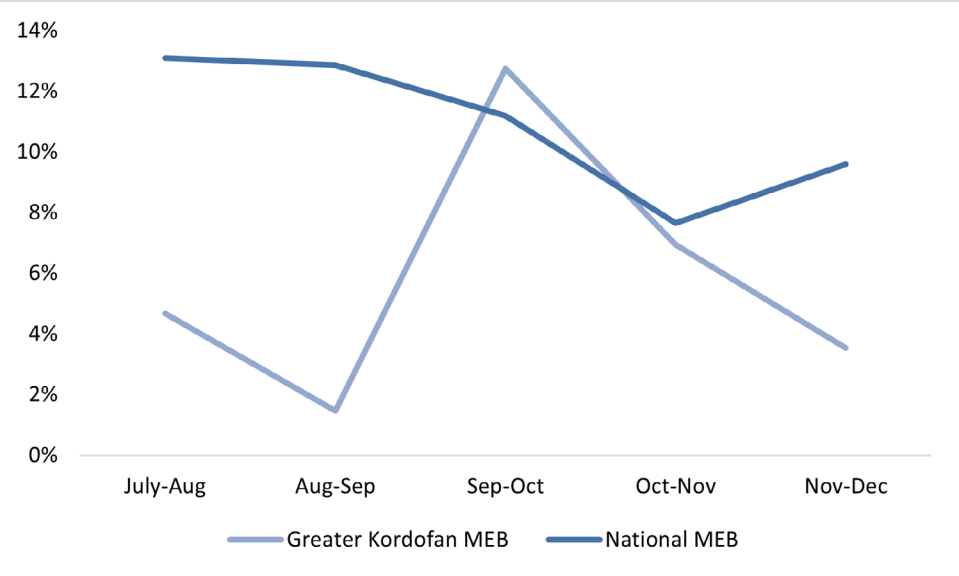
Energy-related items faced the most severe constraints. Gas cylinder (LPG) prices declined by 72% over six months, but price dispersion reached 151%, and "completely unavailable" exceeded 70–90% in most months. Limited availability reached 100% only in December.

MEB Volatility in Greater Kordofan region

Figure 6: MEB Volatility in Greater Kordofan region vs National (%)



The volatility of MEB components in Greater Kordofan from June to December 2025 shows a market experiencing sharp mid-period shocks, particularly in non-food items, combined with relative stability in hygiene goods and the overall MEB Total. The pattern is characterized by a calm start, extreme volatility spikes midway through the period, and a notable stabilization toward the end of the year.

The Household NFIs component displays the highest volatility behaviour across the entire basket. After beginning at a low volatility of 1% in July–August, volatility rises explosively to 42% in August–September and peaks at an exceptional 71% in September–October. This spike represents the most severe volatility recorded in the Greater Kordofan MEB, reflecting the insecurity and volatile context of conflict and instability. By November–December, volatility drops sharply to 10%, signalling a return to more stable supply conditions after a period of intense market stress.

Food items, in contrast, show a more moderate but still uneven trend. Volatility starts at 4% in July–August, and rises again to 11% and 13% through August–October. These mid-period increases suggest renewed pressure within food markets, although not at the extreme levels observed in the NFI components. By November–December, volatility further declines to 7%, indicating partial market correction and improved availability of key food staples.

The Hygiene NFI component stands out for its exceptional stability compared with other categories. Volatility begins at 12% but immediately drops to 0.49% in July–August, followed by consistently low volatility values of 7%, 4%, and just 1% in subsequent months. This consistent low-volatility profile suggests more reliable supply chains for hygiene products, lower exposure to supply shocks, or improved market functioning relative to the more volatile food and household goods sectors.

Amid these fluctuations, the MEB Total remains comparatively stable. Volatility starts at 5% in July–August, then rises to 13% in August–September, reflecting the mid-period shocks stemming primarily from NFI components. Despite this temporary increase, volatility declines again to 7% in September–October and reaches 4% in November–December. The overall steadiness of the MEB Total, despite extreme movements in certain subcomponents, indicates that volatility spikes in one area were partially offset by stable behaviour in others, especially hygiene goods and portions of the food basket.

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Conclusion

Between July and December 2025, markets across Darfur and Greater Kordofan remained operational but structurally fragile, shaped by insecurity, corridor disruptions, and intermittent isolation of key urban and rural hubs. Although sorghum, onions, tomatoes, milk, cow meat, goat meat, laundry soap, toothpaste, sanitary pads, water supply, water containers, and Gas cylinder (LPG) were physically present in many assessed markets, heavy reliance on non-local supply chains, with approximately 85% of vendors in both regions depending on national and cross-border sourcing, and only around 15% on local production, left markets exposed to transport risks, fuel shortages, liquidity constraints, and trade interruptions. Therefore, access constraints might have led to price spikes, volatility surges, and inconsistent availability patterns.

Seasonal production cycles provided only temporary relief. Sorghum prices declined in some months following harvest inflows, and tomatoes recorded short-term price reductions; however, these gains were not sustained. **Onions and tomatoes registered sharp cumulative increases over six months**, with volatility reaching exceptionally high levels. Milk prices showed marked seasonal decline during the rainy period before rebounding strongly toward the end of the year, while cow meat and goat meat remained comparatively stable. **In several instances, six-month price declines coincided with rising volatility, particularly for sorghum.**

Non-food items followed similar patterns. Laundry soap, toothbrushes, and toothpaste recorded overall price increases accompanied by repeated month-on-month decreases. Sanitary pads showed improved availability over six months but experienced intermittent price fluctuations. **Water supply and water containers were highly sensitive to fuel access and road insecurity, with high volatility and temporary shortages despite partial availability in the market.**

Gas cylinder (LPG) exhibited the most severe constraints, characterized by extreme volatility and high proportions of complete unavailability, reflecting heavy dependence on national distribution systems and irregular inflows.

Overall, across both regions, recurring price reversals for sorghum, onions, tomatoes, and milk indicate that seasonal harvest inflows and periodic restocking were insufficient to mitigate structural access constraints. Limited local production, dependence on national and cross-border routes, insecurity along trade corridors, and constrained trader liquidity prevented improvements in supply from translating into predictable pricing or stable access.

The availability of food and non-food items did not consistently equate to affordability or stability, and access to essential food, hygiene, water, and energy items remained uneven and vulnerable to renewed disruption throughout the monitoring period.

National Overview

The national price series for July–December 2025 clearly shows that many of the trends observed in Darfur and Greater Kordofan are not isolated occurrences, but part of broader macro-economic pressures affecting Sudan as a whole.
National MEB volatility shows a general downward trend over the period, decreasing from 13% in July–August to 8% in October–November, with only a mild rebound to 10% in November–December. Yet this moderation in volatility masks ongoing price inflation at the item level across several key commodities. Items that are traditionally import-exposed or transport-intensive, such as vegetable oil, sugar, soaps, milk, and fuel, how persistent six-month price increases despite the decline in volatility.

While national MEB volatility gradually eased from 13% in July–August to 8% in October–November, item-level price trends reveal persistent national inflation, particularly for goods sensitive to import costs and transport conditions. For example, vegetable oil rose 33%, sugar 15%, body soap 12%, goat meat 30%, and milk 25% over six months, patterns strongly aligned with national-level cost-push inflation.

These increases coincide with sustained weakness of the Sudanese Pound. The SDG remained near record lows throughout 2025, with the USD trading around 600–602 SDG for most of the year, reaching its all-time high in September 2025[14]. This stability at a historically weak level indicates severe currency depreciation and high reliance on the parallel market. Earlier in 2025, WFP[15] reported a 112% year-on-year depreciation of the SDG on the parallel market, confirming long-running FX pressures feeding directly into national price levels. Combined with extremely high national inflation, IMF[16] estimates consumer prices rising by over 50% annually in 2025–2026, Sudan's macro environment is consistent with broad, upward pressure on import-dependent commodities.

Overall, national economic forces, FX depreciation, high inflation, fuel and transport costs, and seasonal supply cycles; were major contributors to price behaviour across Sudan. These macro-level pressures directly shaped market outcomes in both Darfur and Greater Kordofan by raising the baseline cost of imported goods, increasing transport-related price volatility, and amplifying seasonal shocks in perishable commodities. As a result, many of the price surges observed in both regions reflect not only local disruptions but also the broader

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Methodology Overview

The analysis is based on JMMI[1] data collected from July-December 2025. JMMI methodology is based on collecting minimum four prices per item from different retailers to ensure quality and consistency of the data collection, collecting only the prices of the cheapest available items. The data contains market price and availability monitoring conducted across two regions; Darfur and Greater Kordofan[2]. The analysis covers MEB food and non-food items and integrates price trends, volatility patterns, commodity availability, and supply-source profiles. Data preparation involved removing duplicates and inconsistent entries, retaining only commodities consistently reported across all six months, and keeping records that include both price and supply-source information. Month-on-month and six-month percentage changes were analysed to capture short- and medium-term price dynamics. A ±5% threshold was applied to flag significant movements, as changes beyond this range typically exceed normal market noise and indicate meaningful shifts in supply, demand, or cost conditions.. A Price dispersion was used to identify unstable commodities prices within the month, along with volatility of prices from one month to another to understand price movements and values above 50% are classified as high. All percentage changes and all volatility values were calculated using median prices to reduce the influence of outliers and abnormal price movements.
Market functionality was assessed through item-level availability categories ("Widely available," "Limited," "Unavailable") across six time points.
Supply-source analysis considered the relative contribution of local, national, and cross-border vendors to identify structural vulnerabilities, including reliance on fragile trade corridors or high-cost transport routes. Findings for each region were synthesised across these components to assess shocks, structural inflation risks, and the operational feasibility of cash-based assistance.

Limitations:

The analysis is constrained by uneven reporting across localities, occasional gaps in availability data, and reliance on trader self-reporting, which may introduce subjective bias. Supply-source proportions indicate vendor presence rather than precise trade volumes. Markets in hard-to-reach or insecure areas may be under-represented, and although median-based calculations help minimise distortion, they cannot fully eliminate the effects of localised market shocks or

1 Check the link for more details on JMMI methodology.
2 This grouping is endorsed by CMWG as of December 2025

Endnotes

1 DFS, Sudan Situation Analysis, November 2025
2 ACAP, Economic impacts and emerging trends in West and Central Darfur, November 2025
3 Ibid
4 UN, UN warns Sudan war entering deadlier phase as fighting spreads in Kordofan, December 2025
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13 FEWS NET, Famine (IPC Phase 5) expected to persist amid escalating conflict and tightening sieges, December 2025 - May 2026 Food security Outlook Update)
14 IMF, World Economic Outlook, October 2025
15 WFP, Sudan Market Monitor, March 2025
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ABOUT IMPACT

Founded in 2010 and headquartered in Geneva, IMPACT Initiatives is a leading applied research organization and the largest independent provider of data in crisis-affected contexts. Through our initiatives—REACH, AGORA, and PANDA—we enable humanitarian and other aid actors to make better, evidence-based decisions by delivering timely, relevant, and methodologically rigorous data and analysis. Our extensive presence across crisis-contexts allows us to collect data directly from crisis-affected people wherever needed, including among the most vulnerable and hard-to-reach.

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Annex 1 - Availability of commodities (%) in Darfur Region per month

Items	Availability	July 2025	August 2025	September 2025	October 2025	November 2025	December 2025
Body soap	Completely unavailable	0.1	6.3	3.7	4.3	4.6	0
	Limited availability	11.9	16.1	15	15.4	12.9	7.7
	Widely available	74.9	62.8	79.9	75.9	79.5	92.3
Cow meat (fresh)	Completely unavailable	0.2	5.4	3.7	5	6.8	0
	Limited availability	7.3	10.9	5.5	6.5	12.4	5.2
	Widely available	79.7	69.1	89.1	88.1	79.5	94.8
Dried tomato	Completely unavailable	2.9	9.4	3.8	7.8	10.1	0
	Limited availability	22	13.9	15.1	21.1	23.8	17.2
	Widely available	62.4	61.8	79.7	68.9	64.3	82.8
Gas cylinder (LPG)	Completely unavailable	76.1	66.9	73.2	89.8	82.8	0
	Limited availability	4.1	7.2	9.7	2.8	10.1	100
	Widely available	0.6	1.7	4.9	1.5	0.5	0
Gas refill (LPG)	Completely unavailable	74.5	68.3	73.7	84.4	82.6	0
	Limited availability	5.7	4.8	10.7	8	9.8	100
	Widely available	0.5	2.1	3.5	1.5	1.2	0
Goat meat (fresh)	Completely unavailable	0.6	5.6	3.8	5	4.6	0
	Limited availability	9.1	14.3	13	13.1	14.9	12.8
	Widely available	77.2	65.4	81.9	81.3	79.2	87.2
Milk (fresh)	Completely unavailable	19.6	22.9	27.1	34.4	24.5	11.5
	Limited availability	16.1	18.2	21.2	22	24.6	39.3
	Widely available	50.1	43.7	48	40.7	46	49.2
Onions	Completely unavailable	0.3	5	3.2	4.3	4.8	0
	Limited availability	11.1	13.5	12.4	13.5	20.3	15.9
	Widely available	75.7	66.3	83.1	80.6	74.9	83.3
Sanitary pads	Completely unavailable	16.4	21.7	22.3	30.9	21	0
	Limited availability	29.6	23.3	29.1	24.1	32.7	34.7
	Widely available	37.1	32.4	39.1	29.4	33.1	65.3
Sorghum	Completely unavailable	0	5.1	3	5.2	7.4	0.9
	Limited availability	12	15.2	18.1	22.2	19.7	25.9
	Widely available	75.4	63.1	76.3	69.4	70.2	73.1
Vegetable oil	Completely unavailable	0.3	4.7	3	4.3	4.3	0
	Limited availability	10.7	12.1	10.3	12.2	14	9.8
	Widely available	76	69.4	84.9	81.9	81.5	90.2
Water container	Completely unavailable	6.1	17.9	14.7	14.6	15.5	2
	Limited availability	31.6	21.7	26.4	27.8	25.8	31.6
	Widely available	48.7	42.3	49.9	50	52.7	66.3
Water supply	Completely unavailable	1.9	11.1	5.9	5.4	5	0
	Limited availability	9.5	8.9	11.7	6.5	7.6	1.7
	Widely available	75.1	63.2	77.7	87.4	86.1	97.4

Annex 2 - Availability of commodities (%) in Greater Kordofan Region per month

Items	Availability	July 2025	August 2025	September 2025	October 2025	November 2025	December 2025
Body soap	Completely unavailable	31.6	32	26.3	5.8	10.3	0
	Limited availability	8.1	10.9	17.4	13.5	15.6	14.4
	Widely available	60.4	54.3	56.3	74.1	73.9	85.6
Cow meat (fresh)	Completely unavailable	17	20.4	19.6	9.4	11	0
	Limited availability	23.7	11.2	4.7	9.2	2.8	0
	Widely available	58.6	67.8	75.7	72.6	85.6	100
Dried tomato	Completely unavailable	30.5	47.2	40.8	27.2	41.3	0
	Limited availability	44.6	31.8	31.2	44.1	37.4	60
	Widely available	23.2	20	28.1	18.6	16.1	40
Gas cylinder (LPG) (LPG)	Completely unavailable	85.3	85.4	89.1	78.2	85.1	0
	Limited availability	9.5	12.2	10.5	9.9	13.3	100
	Widely available	0.4	0.4	0	0.9	0.5	0
Gas refill (LPG)	Completely unavailable	83.3	91.2	98.2	83.5	87.4	14.3
	Limited availability	11.4	7.3	1.1	3.4	10.1	85.7
	Widely available	0.2	0	0	1.3	0.5	0
Goat meat (fresh)	Completely unavailable	19.8	23.8	20.5	6	13.1	0
	Limited availability	29.1	24.5	18	13.5	7.3	17.5
	Widely available	50.4	51.1	61.5	72.2	78.9	82.5
Milk (fresh)	Completely unavailable	30	26.6	24.5	10.5	14.4	0
	Limited availability	33.9	23	13.8	18.2	16.7	29.1
	Widely available	35.4	49.6	61.7	60.4	67.9	70.9
Onions	Completely unavailable	30.4	36.9	39.4	27.4	21.3	0
	Limited availability	21.9	22.1	12.5	24.4	28.7	48.1
	Widely available	47.2	40.6	47.4	39	49.5	51.9
Sanitary pads	Completely unavailable	33.9	41.2	43	22.1	21.3	0
	Limited availability	20.9	23.6	26.5	25.1	42.9	47.1
	Widely available	34	26.2	23.4	40.3	25.2	52.9
Sorghum	Completely unavailable	20	22.7	20.5	6.2	11.7	0
	Limited availability	19.3	22.1	16	16.7	7.3	14.9
	Widely available	60.5	54.5	63.3	69.6	80.5	85.1
Vegetable oil	Completely unavailable	15.4	19.1	19.8	6	10.8	0
	Limited availability	27	13.1	9.1	6.2	3.2	8.7
	Widely available	57.2	67.2	71	80.5	85.6	91.3
Water container	Completely unavailable	23.3	34.1	37.2	17.3	22.9	0
	Limited availability	25.8	34.3	25.6	34.7	44.5	42.6
	Widely available	48.2	30.3	36.1	39.2	30.5	57.4
Water supply	Completely unavailable	13.3	21.2	21.2	8.8	14.4	0
	Limited availability	6.7	11.8	6.9	9.6	9.4	6.9
	Widely available	79.8	67	71.7	71.9	74.5	93.1

Annex 3 - Dispersion and Six Months Change of commodities (%) Darfur Region per month

Items	Price Dispersion_Jul	Price Dispersion_Aug	Price Dispersion_Sep	Price Dispersion_Oct	Price Dispersion_Nov	Price Dispersion_Dec	Six_Month_Change
Body soap	20.44%	23.42%	29.47%	21.93%	21.22%	26.51%	11.31%
Cow meat	23.29%	28.19%	22.86%	27.97%	30.30%	27.55%	-10%
Gas cylinder (LPG)	39.16%	37.02%	30.04%	49.29%	28.23%	44.56%	-71.99%
Gas refill (LPG)	81.68%	41.36%	10.54%	6.41%	1.12%	57.95%	
Goat meat	26.39%	29%	22.69%	28.94%	27.08%	27.83%	0%
Milk	25.56%	9.83%	18.04%	20.40%	10.34%	8.69%	33.33%
Onions	119.33%	28.58%	26.06%	17.49%	20.21%	115.03%	199.63%
Sanitary pads	39.07%	28.27%	29.23%	18.87%	21.07%	27.82%	19.50%
Sorghum	17.97%	17.02%	27.87%	23.89%	43.42%	46.07%	-9.30%
Tomato	61.85%	42.38%	48.59%	86.43%	61.76%	97.33%	11.83%
Veg oil	14.82%	21.62%	19.01%	19.27%	18.61%	25.05%	-16.60%
Water container	82.45%	54.47%	122.26%	106.36%	68.78%	117.02%	0%
Water supply	14%	117.89%	46.82%	74.21%	19.18%	14.10%	12.67%

Annex 4 - Price Dispersion and Six Months Change of commodities (%) Greater Kordofan Region per month

Items	Price Dispersion_Jul	Price Dispersion_Aug	Price Dispersion_Sep	Price Dispersion_Oct	Price Dispersion_Nov	Price Dispersion_Dec	Six_Month_Change
Body soap	**20.44%**	**23.42%**	**29.47%**	**21.93%**	**21.22%**	**26.51%**	**33.33%**
Cow meat	**23.29%**	**28.19%**	**22.86%**	**27.97%**	**30.30%**	**27.55%**	**6.90%**
Gas cylinder (LPG)	**39.16%**	**37.02%**	**30.04%**	**49.29%**	**28.23%**	**44.56%**	**-58.33%**
Gas refill (LPG)	**81.68%**	**41.36%**	**10.54%**	**6.41%**	**1.12%**	**57.95%**	19.83%
Goat meat	**26.39%**	**29%**	**22.69%**	**28.94%**	**27.08%**	**27.83%**	**14.29%**
Milk	**25.56%**	**9.83%**	**18.04%**	**20.40%**	**10.34%**	**8.69%**	**2.94%**
Onions	**119.33%**	**28.58%**	**26.06%**	**17.49%**	**20.21%**	**115.03%**	**-25%**
Sanitary pads	**39.07%**	**28.27%**	**29.23%**	**18.87%**	**21.07%**	**27.82%**	**20%**
Sorghum	**17.97%**	**17.02%**	**27.87%**	**23.89%**	**43.42%**	**46.07%**	**-12.50%**
Tomato	**61.85%**	**42.38%**	**48.59%**	**86.43%**	**61.76%**	**97.33%**	**304.59%**
Veg oil	**14.82%**	**21.62%**	**19.01%**	**19.27%**	**18.61%**	**25.05%**	**33.33%**
Water container	**82.45%**	**54.47%**	**122.26%**	**106.36%**	**68.78%**	**117.02%**	**10.08%**
Water supply	**14%**	**117.89%**	**46.82%**	**74.21%**	**19.18%**	**14.10%**	**40%**

Annex 5 - Supply Source Share (%) Region Level.

Region	Supply Source	# of Vendors	% Source Share
Darfur	Cross-border	**1680**	**28.9**
	Local	**847**	**14.6**
	National	**3288**	**56.5**
Greater Kordofan	Cross-border	**911**	**37.4**
	Local	**376**	**15.4**
	National	**1128**	**46.3**