



# Sudan

## Geographic Futures

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In this entry, we first describe the Current Path (CP) forecast for Sudan as it is expected to unfold to 2043, the end of the third ten-year implementation plan of the African Union's Agenda 2063 long-term vision for Africa. The Current Path in the [International Futures \(IFs\) forecasting model](#) initialises from country-level data that is drawn from a range of data providers. We prioritise data from national sources.

The Current Path forecast is divided into summaries on demographics, economics, poverty, health/WaSH and climate change/energy. A second section then presents a single positive scenario for potential improvements in stability, demographics, health/WaSH, agriculture, education, manufacturing/transfers, leapfrogging, free trade, financial flows, infrastructure, governance and the impact of various scenarios on carbon emissions. With the individual impact of these sectors and dimensions having been considered, a final section presents the impact of the Combined Agenda 2063 scenario.

We generally review the impact of each scenario and the Combined Agenda 2063 scenario on gross domestic product (GDP) per person and extreme poverty except for Health/WaSH that uses life expectancy and infant mortality.

The information is presented graphically and supported by brief interpretive text.

All US\$ numbers are in 2017 values.



## Summary

- Current Path forecast
  - Sudan is a low-income country located at the crossroads of sub-Saharan Africa and the Middle East and stretches across the Red Sea. It has a surface area of 1.886 million km<sup>2</sup>. [Jump to Current Path forecast](#)
  - The population of Sudan was 43 million in 2019, and on the Current Path it is forecast to be 76 million by 2043, a 76.8% increase over the next 24 years. [Jump to Demographics: Current Path](#)
  - In 2019, the size of Sudan's economy was US\$72.7 billion. By 2043, the economy is projected to grow to about US\$200 billion, making it the 11th largest economy in Africa under the Current Path assumptions for other countries. [Jump to Economics: Current Path](#)
  - In 2019, the GDP per capita (PPP and 2017 constant US\$) for Sudan was US\$4 298. By 2043, it is projected to grow to US\$5 918 billion, US\$2 128 above the projected average for low-income countries in Africa. [Jump to Economics: Current Path](#)
  - Based on the US\$1.90 poverty line, Sudan had 38% of its population, equivalent to 16.4 million people, living in extreme poverty in 2019. The extreme poverty rate is forecast to decline to 21.7% by 2043, below the projected average for low-income countries in Africa, which will then be 25.1%. [Jump to Poverty: Current Path](#)
  - In 2019, Sudan produced 6.9 million tons of carbon, and by 2043 will be producing 16.9 million tons of carbon, an increase of 145%. [Jump to Carbon emissions/Energy: Current Path](#)
- Sectoral scenarios
  - The Stability scenario improves security and stability in Sudan. By 2043, the governance security index score (which ranges from 0 to 1) in the Stability scenario is 0.81, about 21% higher than the Current Path forecast and 14% higher than the projected average of 0.71 on the Current Path for Africa low-income countries. [Jump to Stability scenario](#)
  - In 2019, the ratio of the working-age population to dependants stood at 1.3, meaning that there was about one person of working age for each dependant. On the Current Path, it is forecast to be 1.6 by 2043. In the Demographic scenario, the working-age population to dependants ratio is 1.7 by 2043, the minimum ratio required to expect the materialisation of the demographic dividend. [Jump to Demographic scenario](#)
  - The Health/WaSH scenario improves life expectancy at birth to 74.2 years compared to 73.3 years in the Current Path forecast by 2043. In this scenario, life expectancy in Sudan is more than three years higher than the projected average of 70.8 for low-income countries in Africa in 2043. [Jump to Health/WaSH scenario](#)
  - The Agriculture scenario improves crop yields from about 1.4 tons per hectare in 2019 to 2.97 tons per hectare in 2043, compared to 1.7 tons in the Current Path forecast. [Jump to Agriculture scenario](#)
  - The average years of education for adults aged 15 years and older stood at 4 years in 2019, and in the Education scenario, it is projected to improve by about five months about the Current Path forecast for 2043. [Jump to Education scenario](#)
  - When using the low-income countries' extreme poverty threshold of US\$1.90, the number of poor people in Sudan stands at 15.3 million, or 20.2%, of the population by 2043 in the Manufacturing/Transfers scenario compared to 16.4 million, or 21.7%, in the Current Path forecast for that year. [Jump to Manufacturing/Transfers scenario](#)
  - Fixed broadband subscription is very low in Sudan: it was 1.6 subscriptions per 100 people in 2019, below the average of 2.3 for low-income countries in Africa. In the Leapfrogging scenario, fixed broadband subscriptions increase to 40.3 per 100 people by 2043, higher than the Current Path forecast of 19.9 subscriptions per 100 people for the same year. [Jump to Leapfrogging scenario](#)
  - In the Free Trade scenario, Sudan's trade balance improves. The trade surplus peaks at 2.7% of GDP in 2038 before slowly declining to a surplus equivalent to 0.8% of GDP by 2043. However, in 2043, the trade surplus forecast on the Current Path (1.52% of GDP) is larger than in the Free Trade scenario (0.8% of GDP). [Jump to Free Trade scenario](#)
  - In the Financial Flows scenario, FDI flows to Sudan by 2043 represent about 4.8% of GDP compared to 4.3%

in the Current Path forecast. [Jump to Financial Flows scenario](#)

- The Infrastructure scenario increases the rural population within a 2 km access to an all-weather road to 77.7% of the population, slightly above the 77.2% in the Current Path forecast in 2043. [Jump to Infrastructure scenario](#)
  - The projected score for government effectiveness in the Governance scenario by 2043 is 1.85 (out of a maximum of 5). This is 0.27 points higher than the projected score of 1.58 in the Current Path forecast in the same year. [Jump to Governance scenario](#)
  - The Free Trade and Agriculture scenarios have the most significant impact on carbon emissions. [Jump to Impact of scenarios on carbon emissions](#)
- Combined Agenda 2063 scenario
    - By 2043, the GDP of Sudan in the Combined Agenda 2063 scenario is US\$150.4 billion, larger than the Current Path forecast. By 2043, the GDP per capita of Sudan in the Combined Agenda 2063 scenario is US\$3 023, more than the Current Path forecast for the same year. [Jump to Combined Agenda 2063 scenario](#)

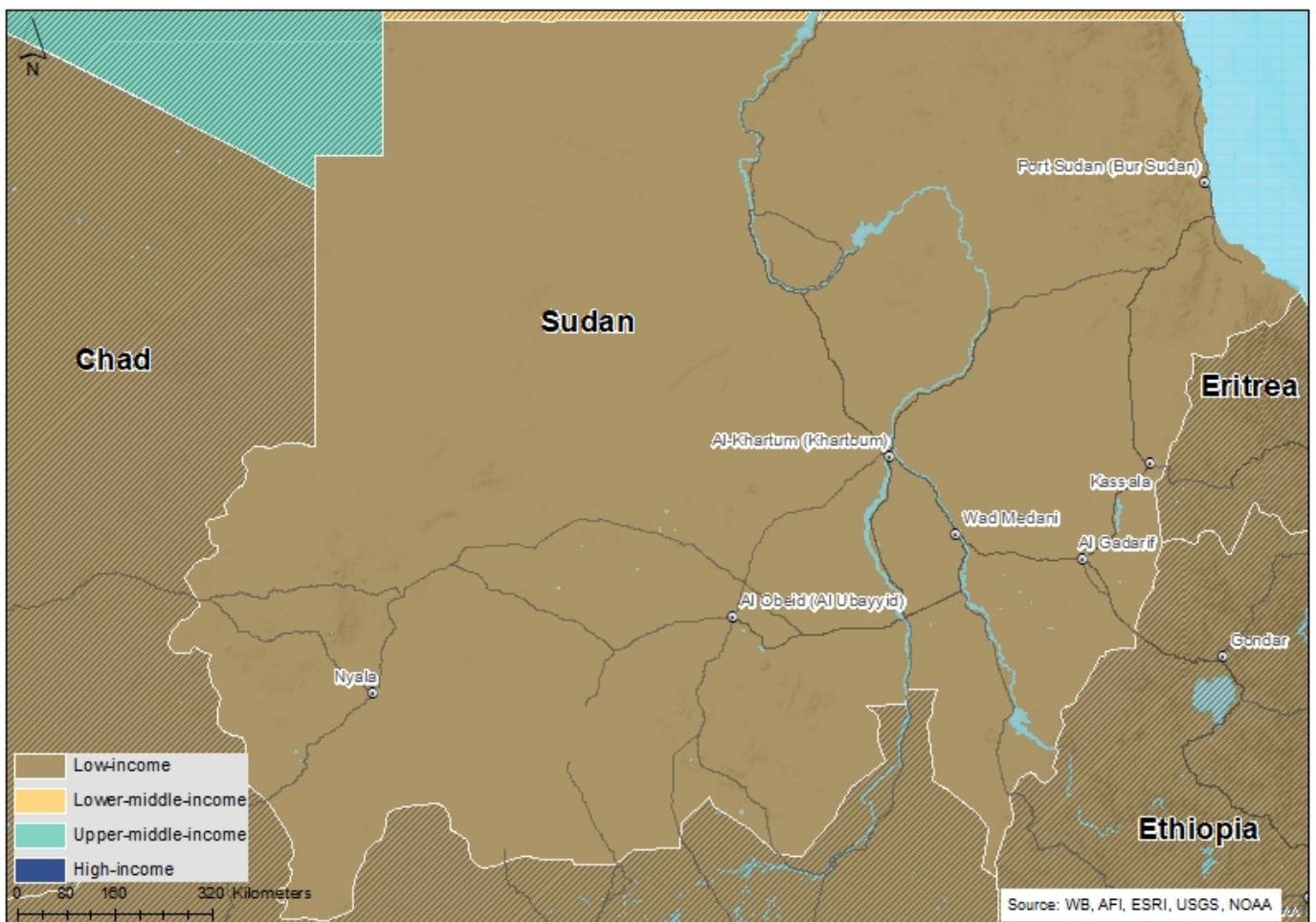
## Sudan: Current Path

- Sudan: Current Path forecast
- Demographics: Current Path
- Economics: Current Path
- Poverty: Current Path
- Carbon Emissions/Energy: Current Path



### Sudan: Current Path forecast

Chart 1: Political map of Sudan



This page provides an overview of the key characteristics of Sudan along its likely (or Current Path) development trajectory. The Current Path forecast from the International Futures forecasting (IFs) platform is a dynamic scenario that imitates the continuation of current policies and environmental conditions. The Current Path is therefore in congruence with historical patterns and produces a series of dynamic forecasts endogenised in relationships across crucial global systems. We use 2019 as a standard reference year and the forecasts generally extend to 2043 to coincide with the end of the third ten-year implementation plan of the African Union’s Agenda 2063 long-term development vision.

The Republic of the Sudan is geographically located at the crossroads of sub-Saharan Africa and the Middle East and



stretches across the Red Sea. Sudan shares borders with seven countries including Libya and Egypt to the north, Chad to the west, the Central African Republic to the south-west, South Sudan to the south, Ethiopia to the south-east and Eritrea to the east.

Prior to the secession of South Sudan in 2011, Sudan was the largest African country, with an area that represented more than 8% of the African continent and almost 2% of the world's total land area.

Currently, Sudan has a surface area of 1.886 million km<sup>2</sup> and a population of more than 42.8 million as of 2019. The country is a member of the Intergovernmental Authority on Development (IGAD), an eight-country regional bloc in Africa with ambitions to embark on regional integration.

For most of its independent history, the country has been beset by internal conflicts that have weakened its ability to play a leadership role in the region. Continuous food price hikes led to the December 2018 demonstrations that resulted in the removal of President al-Bashir from power in April 2019. This led to the formation of a transitional government in September 2019. The power-sharing agreement between the military and civilian forces, expected to last 39 months, allowed a civilian prime minister to lead the government under the authority of a presidential sovereign council to be chaired by the military during the first 21 months followed by a civilian during the remaining 18 months. However, the transition was interrupted on 25 October 2021 when the Sudanese military, led by General Abdel Fattah al-Burhan, took control of the government in a military coup.

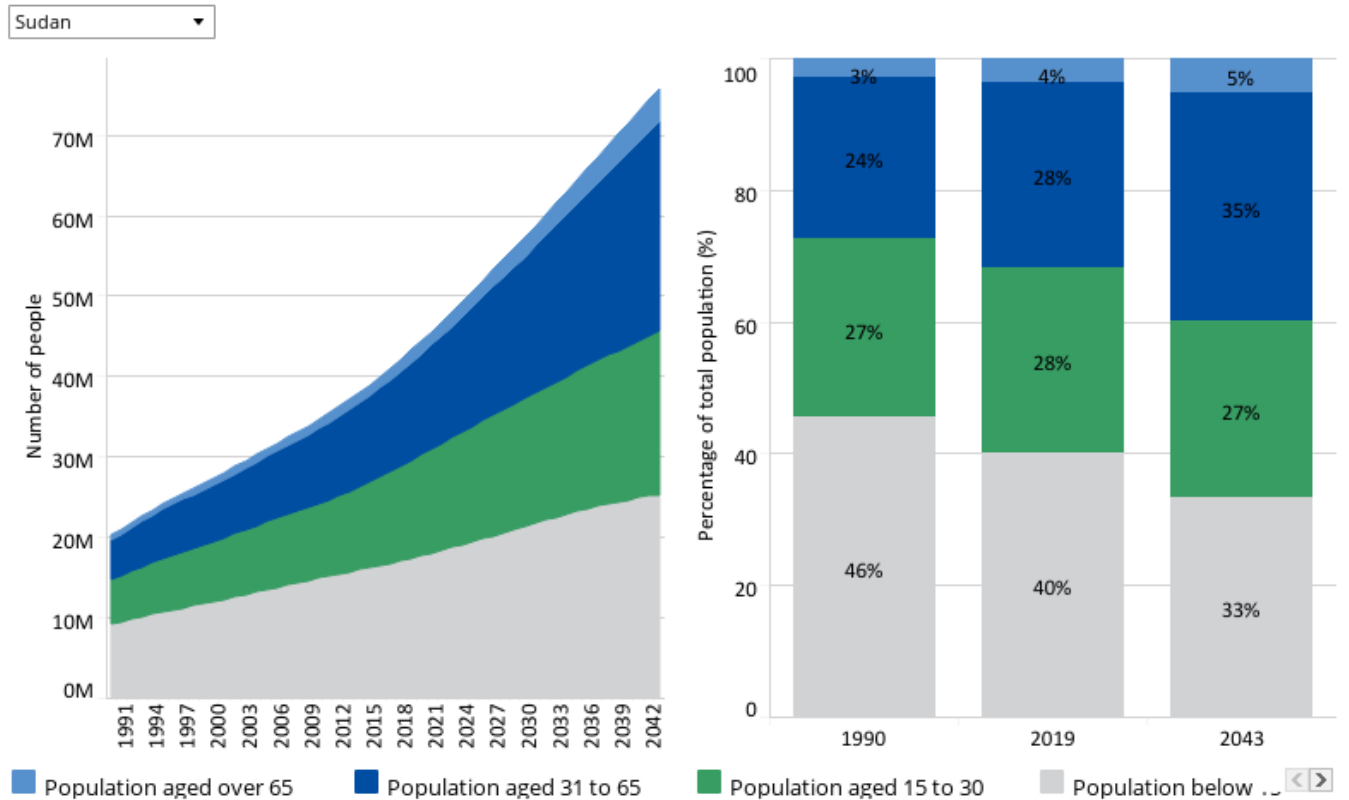




## Demographics: Current Path

### Chart 2: Population structure in CP, 1990–2043

By cohort and % of population



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate and World Development Indicators population data

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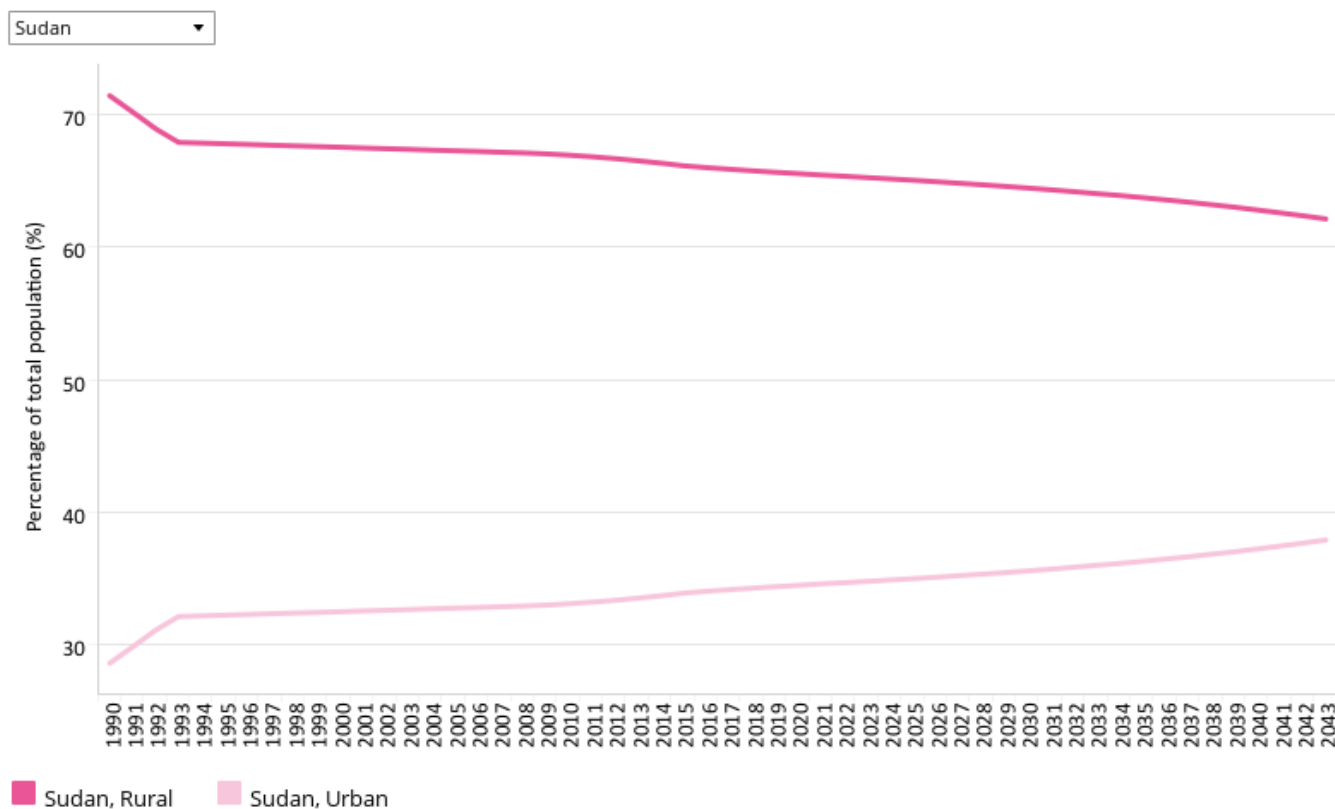
The characteristics of a country's population can shape its long-term social, economic and political foundations; thus, understanding a nation's demographic profile indicates its development prospects.

The population of Sudan is growing at a quick rate of 2.42% per year. The Sudanese population is highly mobile because of the prevalence of pastoral livelihoods. About one-tenth of the population is estimated to follow a nomadic lifestyle. Also, the country hosts 1.1 million refugees and more than 3 million internally displaced persons (IDPs).[1] Recently, it saw new displacements from Ethiopia as a result of clashes in Ethiopia's Tigray region.

The population of Sudan was 42.8 million in 2019, and on the Current Path, it is forecast to be 75.7 million by 2043, a 76.8% increase over the next 24 years.

Like many countries in sub-Saharan Africa, the population of Sudan is predominantly young with 28% of it under the age of 30, and 40% under the age of 15 in 2019. This means that a large portion of the population is dependent on the workforce to provide for its needs. On the Current Path, the population under 15 years is expected to decline to reach 33% of the population by 2043. The share of the elderly (65 years and older) was 4% in 2019, and it is projected to slightly increase to 5% by 2043. The structure of Sudan's population is typical of countries with high fertility rate and low life expectancy.

Chart 3: Urban and rural population in CP, 1990–2043  
% of population



Source: IFs 7.63 initialising from UN World Urbanization Prospects estimate

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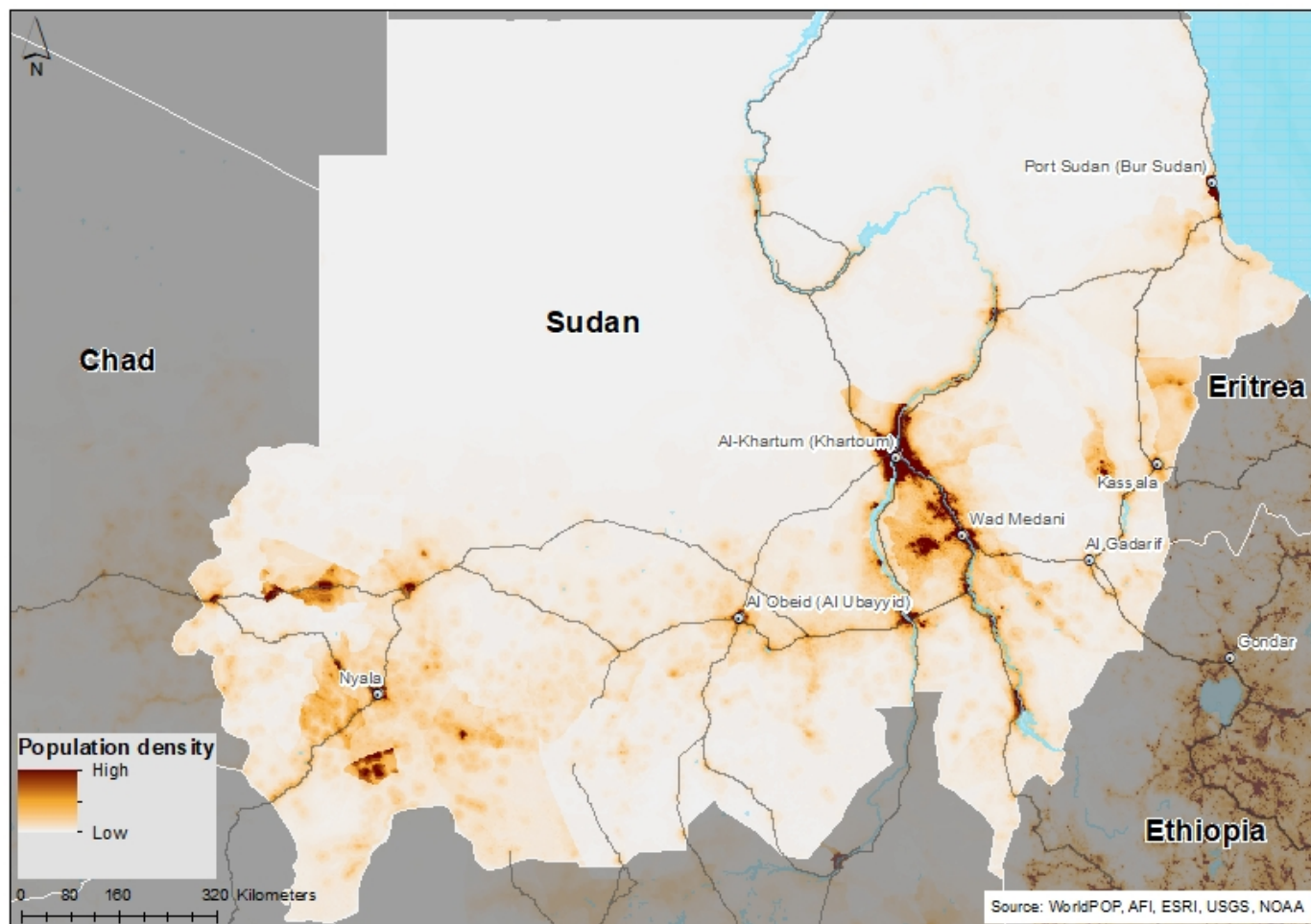
There has been considerable rural to urban migration in Sudan in the decades since independence. The urban population increased from 8.3 to 18% of the total between 1956 and 1972, and at the time of the south's secession in 2011 the fraction of the population that is urban was about one-third.[2]

In 2019, Sudan had 34.4% of its population residing in urban areas. This is about 3 percentage points above the average of 31% for low-income countries in Africa. On the current development trajectory, the rate of urbanisation in Sudan is projected to increase to 37.9% by 2043, while the rural population will have dropped to 62.1% from 65.6% in 2019.

Urbanisation has been more pronounced in areas of the country where trade is more highly developed. With few exceptions, all major cities and towns in Sudan lie along the Nile or one of its tributaries or along the coast of the Red Sea. Recurrent famine and the long-running civil war have brought more than 3 million southern and western Sudanese to the capital since 1983.[3] The largest urban area is that of the capital, Khartoum, and nearby Omdurman and Khartoum North, located roughly in the centre of the country.

If not well managed, urbanisation could lead to problems such as unemployment, poverty, inadequate health, poor sanitation, expansion of urban slums and environmental degradation. In Sudan, the population living in slums (the percentage of the urban population) was 88.4% in 2018, down from 93.6% in 2016.[4] Good urban planning could foster an inclusive economy by improving service delivery and reducing urban poverty.

Chart 4: Population density map for 2019



Sudan has a rather low population density as a whole, but due to the lack of adequate water supplies in many parts of the country, half of the population lives on just over 15% of the land. By contrast, one-quarter of Sudan is virtually uninhabited, including the deserts of the north and north-west.[5]

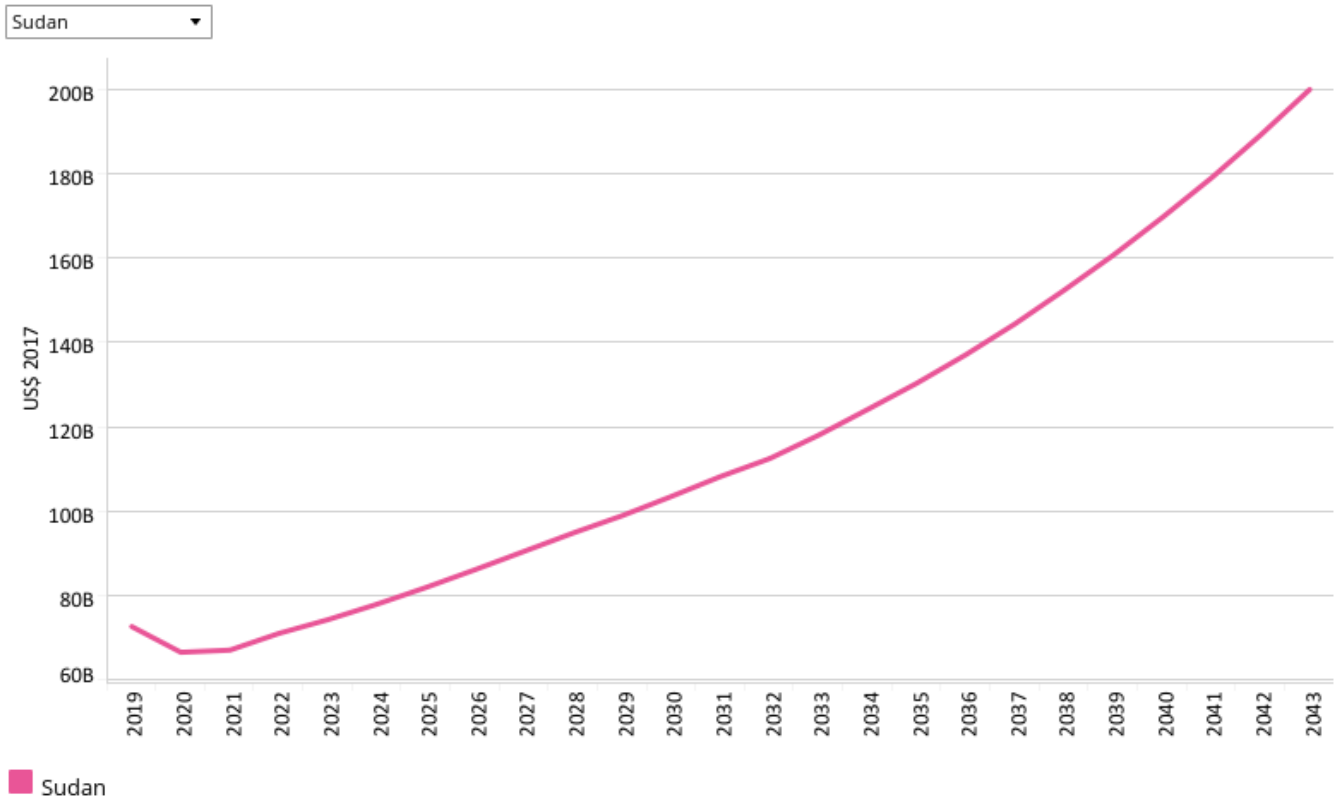
The population density of Sudan amounted to 0.25 inhabitants per hectare in 2019, below the average for low-income countries in Africa. The population density is forecast to increase to 0.44 inhabitants per hectare by 2043, below the projected average of 0.74 inhabitant per hectare for Africa low-income countries.





## Economics: Current Path

Chart 5: GDP in CP, 1990–2043  
Market exchange rates



Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

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The Sudanese economy suffered from US sanctions and received a massive blow with South Sudan's secession. The secession of South Sudan led to multiple economic shocks. The biggest one being the loss of 75% of its oil resources, which accounted for more than half of Sudan's government revenue and 95% of its exports. This has reduced economic growth and resulted in double-digit consumer price inflation, which, together with increased fuel prices, triggered violent protests in the country.

About three years after former president al-Bashir was overthrown, Sudan is still trapped in political instability, economic mire with currency depreciation, rising inflation and food shortages.

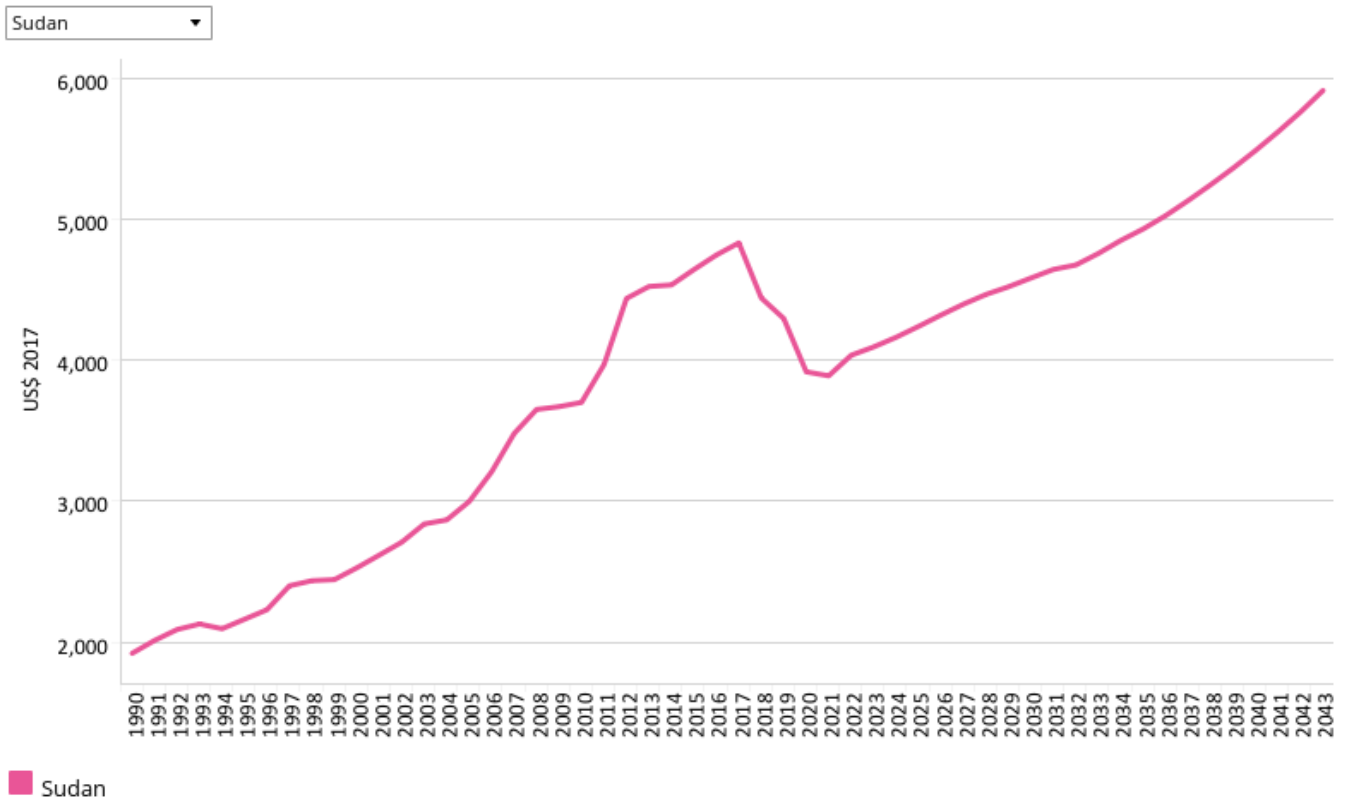
The removal of Sudan from the US State Sponsors of Terrorism list, reportedly in exchange for its recognition of Israel, is expected to open the door for aid, debt relief, trade and investment which are badly needed to pull the country out of its severe economic crisis compounded by COVID-19. The October 2021 military coup that toppled the transitional government will constrain economic recovery which is heavily reliant on international support. Some key donors have made clear that their support is contingent on the political transition moving forward.

In 2019, the size of the Sudanese economy (GDP) was US\$72.7 billion. By 2043, the economy is projected to grow to about US\$200 billion, making it the 11th largest economy in Africa under the Current Path assumptions for other countries. Substantial and sustainable economic development in Sudan will be contingent on progress on inclusive politics and the

rule of law.

### Chart 6: GDP per capita in CP, 1990–2043

Purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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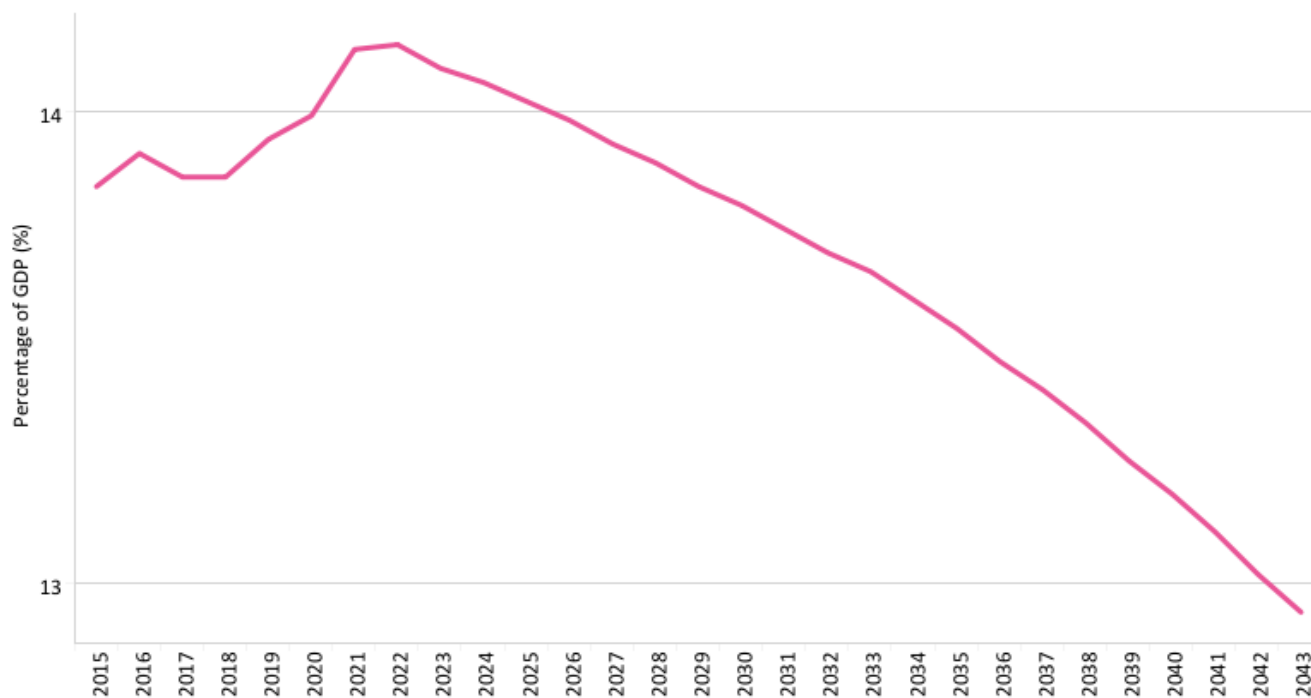
Although many of the charts in the sectoral scenarios also include GDP per capita, this overview is an essential point of departure for interpreting the general economic outlook of Sudan.

The GDP per capita (PPP) of Sudan was US\$4 298 in 2019. It declined to US\$3 920 in 2020 due to the economic slowdown associated with the COVID-19 pandemic. On the Current Path, the GDP per capita (PPP) is forecast to increase to US\$5 918 by 2043. This will be US\$2 128 above the projected average of US\$3 790 for low-income countries in Africa in the same year.

Chart 7: Informal sector value in CP, 2015–2043  
% of GDP



Sudan



Sudan

Source: IFs 7.63 initialising from UN Economic Commission for Europe [2008]; Elgin and Oztunali [2012]; Schneider and Enste [2012]

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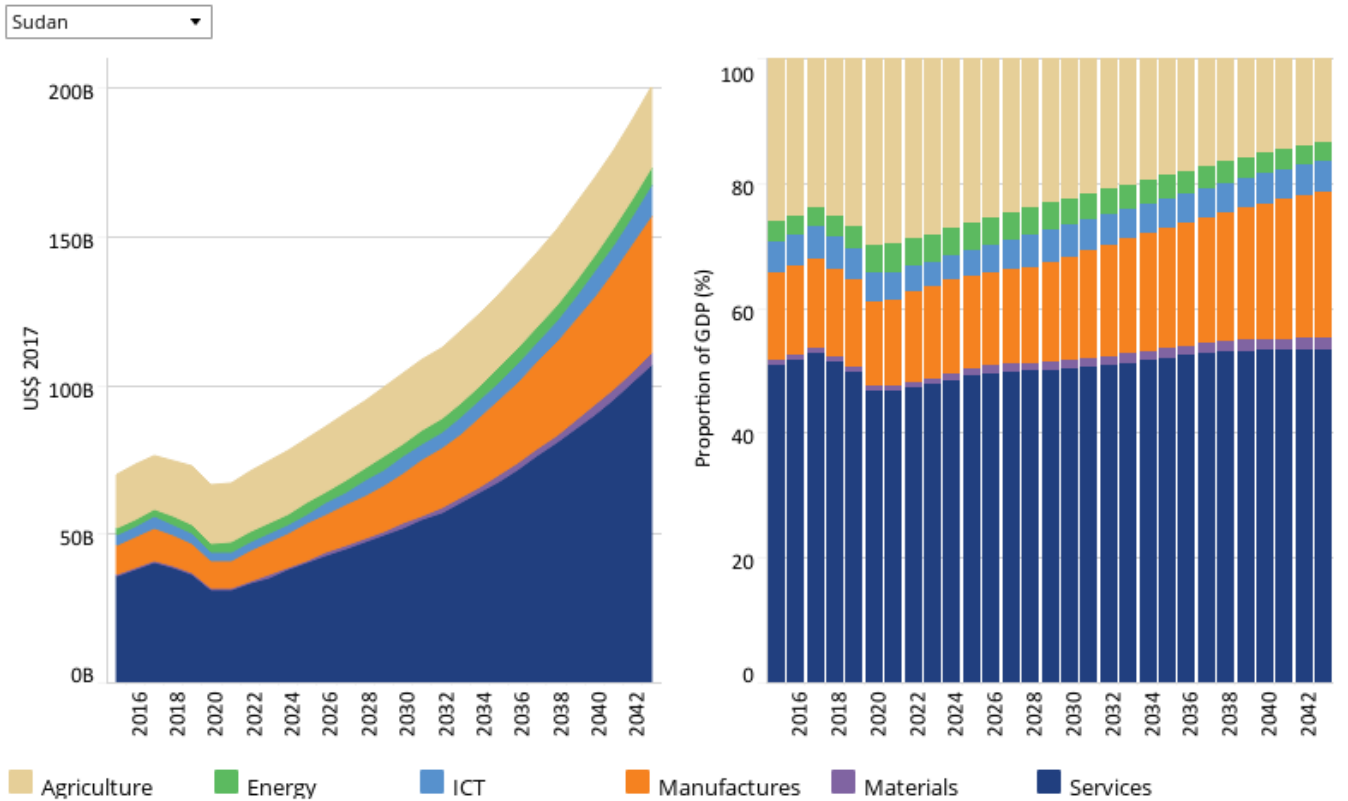
The informal economy comprises activities that have market value and would add to tax revenue and GDP if they were recorded. Countries with high informality have a whole host of development challenges, higher poverty, lower per capita incomes, greater inequality, less human capital, weaker productivity investment, and weaker governance as well. With the rise of unemployment, absence of unemployment insurance and decreasing job opportunities in the formal sector, many unemployed people have found themselves in the informal sector.

In 2019, the size of the informal economy was equivalent to 13.9% of the country's GDP. It increased to 14.1% in 2021 as the COVID-19 crisis and its associated economic crisis pushed many people out of the formal economy.

Although the informal economy provides a safety net for the country's large and growing working-age population, it impedes economic growth and hinders improved economic policies. Reducing informality would allow more people to benefit from better wages and redistributive measures. It would also increase tax revenue and government capacity.



**Chart 8: Value added by sector in CP, 2015–2043**  
Billions US\$ 2017 and % of GDP



Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

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The IFs platform uses data from the Global Trade and Analysis Project (GTAP) to classify economic activity into six sectors: agriculture, energy, materials (including mining), manufacturing, services and information and communication technologies (ICT). Most other sources use a threefold distinction between only agriculture, industry and services with the result that data may differ.

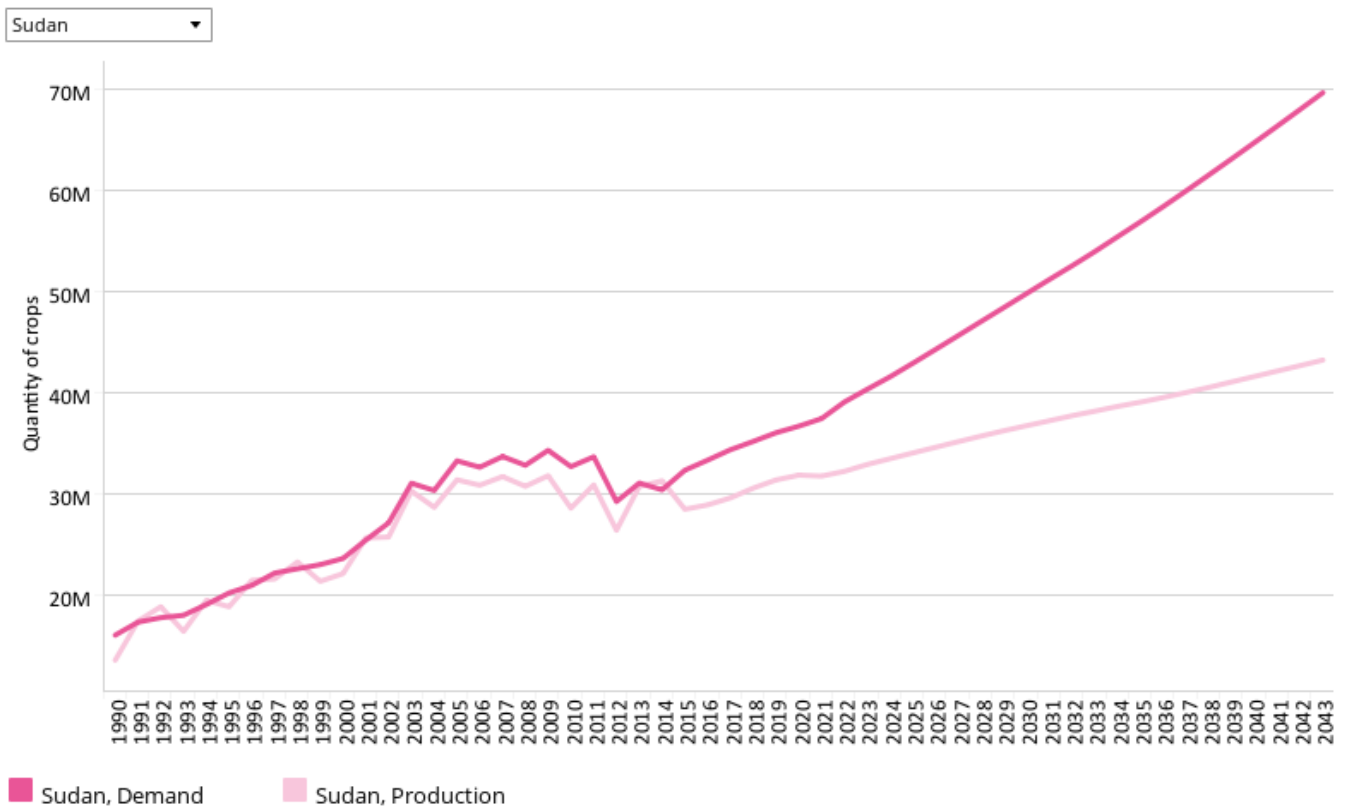
Sudan's economy is dominated by the service and agriculture sectors, which make up over 70% of GDP. In 2019, the service sector accounted for 49.7% of the country's GDP (US\$36.1 billion), while the agriculture sector, the second largest contributor to GDP, represented 26.8% (US\$19.5 billion). The manufacturing sector makes the third largest contribution to the country's GDP. Manufacturing value added has been stagnant for decades in Sudan. Moreover, the oil boom of the 2000s contributed to worsening non-oil sector performance by reducing public incentives to invest in and support diversified economies. In 2019, the manufacturing sector accounted for 13.9% of GDP (US\$10.1 billion).

Across the Current Path forecast horizon, the service sector remains the dominant sector of Sudan's economy. Thus, the share of the service sector in GDP is projected to reach 53.4% (US\$106.8 billion) by 2043.

As a result of the structural transformation of the economy, the share of the agriculture sector in GDP is forecast to decline to 13.4% (US\$26.7 billion) by 2043. The manufacturing sector is forecast to overtake agriculture by 2035 to become the second largest contributor to GDP in such that by 2043, manufacturing will account for 23.2% of GDP. This sounds good for the development prospects of the country as it will make it contribute to sustain growth, create jobs and reduce poverty.

The contributions of the ICT and materials sectors to Sudan's GDP remain below 5% across the forecast horizon.

**Chart 9: Agriculture production/demand in CP, 1990–2043**  
Crops million tons



Source: IFs 7.63 initialising from Food and Agriculture Organization Food Balance Sheets

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The data on agricultural production and demand in the IFs forecasting platform initialises from data provided on food balances by the Food and Agriculture Organization (FAO). IFs contains data on numerous types of agriculture but aggregates its forecast into crops, meat and fish, presented in million metric tons. Chart 9 shows agricultural production and demand as a total of all three categories.

In Sudan, the agriculture sector employs about 80% of the workforce. The country has vast areas of agricultural land (about 200 million acres of arable land) and adequate water resources (25% share of Nile water resources under regional agreements). In fact, due to Sudan's loss of access to most of its oil revenue with South Sudan's secession and Sudanese authorities' desperate need for revenue, a new focus on agriculture has resurrected its long-standing dream of becoming an agricultural powerhouse.[6]

Due to a high dependence on rain-fed agriculture, lack of infrastructure and investment in agriculture, and poor governance, agricultural yields and thus productivity are quite low in Sudan. As a result, many people suffer from food insecurity and malnutrition.

Agricultural crop production in 2019 stood at 31.4 million metric tons, lower than the demand of 36 million metric tons in the same year. Across the forecast horizon, the excess demand will continue to increase. In 2043, agricultural crop production and demand are forecast to be 43.2 million metric tons and 69.7 million metric tons, respectively. This is equivalent to excess demand for crops of roughly 26.5 million metric tons that will likely be met through imports.



## Poverty: Current Path

Chart 10: Poverty in CP, 2015–2043  
Millions of people and % of total population



Sudan \$1.90



Sudan

Source: IFS 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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There are numerous methodologies for and approaches to defining poverty. We measure income poverty and use GDP per capita as a proxy. In 2015, the World Bank adopted the measure of US\$1.90 per person per day (in 2011 international prices), also used to measure progress towards the achievement of Sustainable Development Goal (SDG) 1 of eradicating extreme poverty. To account for extreme poverty in richer countries occurring at slightly higher levels of income than in poor countries, the World Bank introduced three additional poverty lines in 2017:

- US\$3.20 for lower middle-income countries
- US\$5.50 for upper middle-income countries
- US\$22.70 for high-income countries.

Rampant government corruption and unemployment are major causes of poverty in Sudan. While individuals living in households with unemployed household heads represent only 2.4% of the total population, they account for 50% of the population living in extreme poverty.[7] Also, the incidence of poverty is highly uneven across states in Sudan. For example, the northern states and the districts of Khartoum City have the lowest poverty rate while poverty remains severe in the southern and the western states. The poverty rate in the Darfur states is more than 60%.[8]



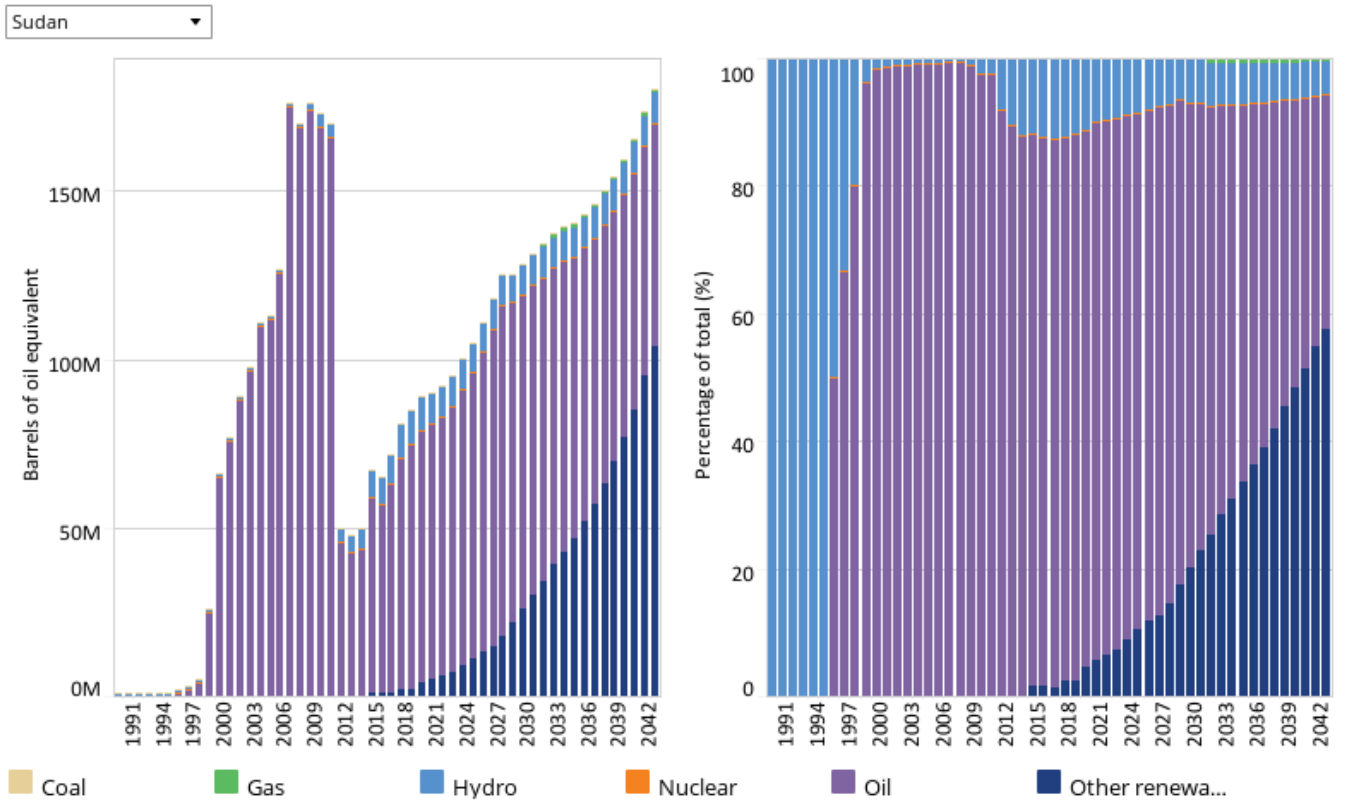
Based on the US\$1.90 2011 purchasing power parity poverty line, the poverty rate in Sudan was 38% in 2019, below the average of 47.7% for low-income countries in Africa. The extreme poverty rate increased to about 45% in 2020, probably due to the economic impact of the COVID-19 pandemic and political instability.

In the Current Path forecast, the extreme poverty rate at US\$1.90 is projected to decline to 21.7% (16.4 million people) by 2043, below the projected average of 25.1% for low-income countries in Africa in the same year.



## Carbon Emissions/Energy: Current Path

Chart 11: Energy production by type in CP, 1990–2043  
Barrels of oil equivalent and % of energy production



Source: IFs 7.63 initialising from World Energy Outlook data

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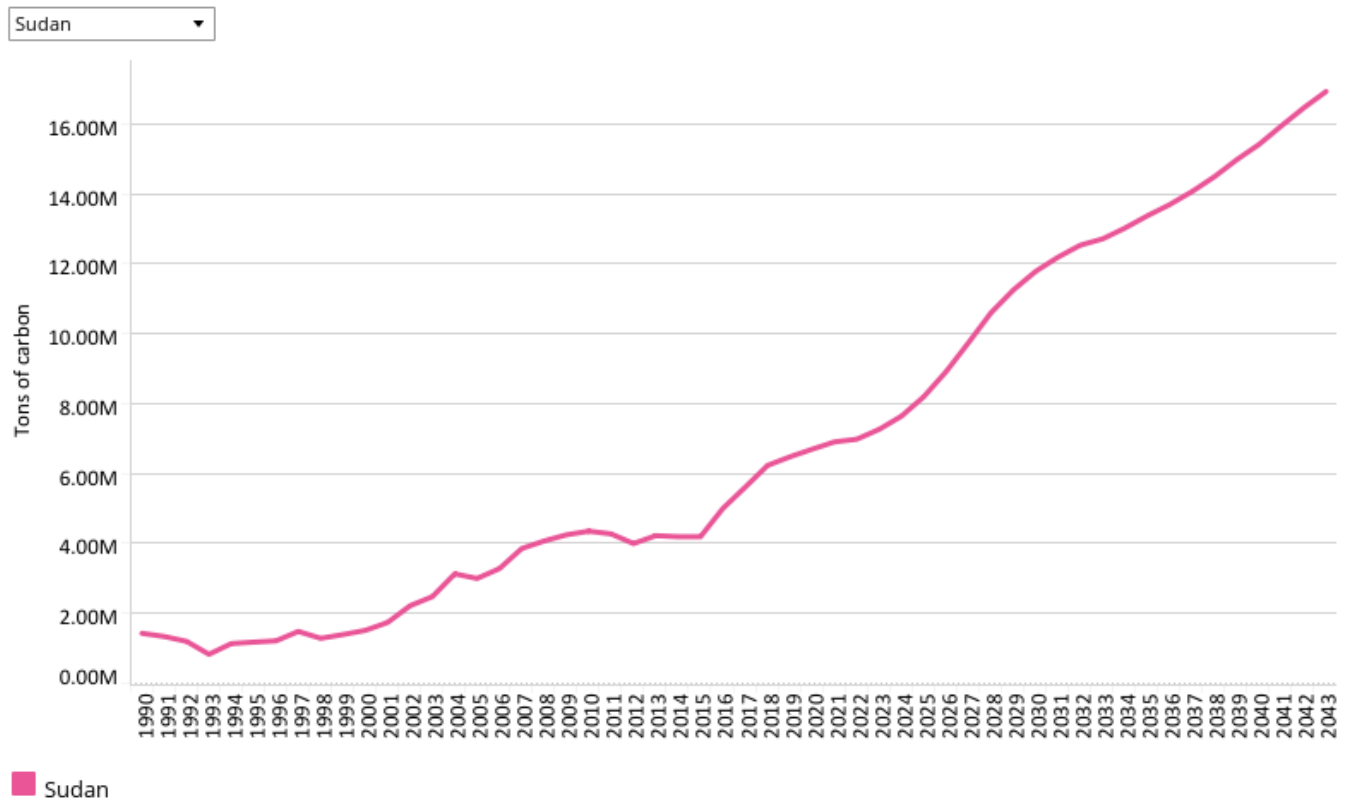
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The IFs platform forecasts six types of energy, namely oil, gas, coal, hydro, nuclear and other renewables. To allow comparisons between different types of energy, the data is converted into billion barrels of oil equivalent (BBOE). The energy contained in a barrel of oil is approximately 5.8 million British thermal units (MBTUs) or 1 700 kilowatt-hours (kWh) of energy.

Prior to the secession of South Sudan, Sudan as a whole was estimated to have 6 billion barrels of oil and 3 trillion cubic feet of natural gas reserves. As most oil blocks are in the territory of South Sudan, the oil producing capacity of Sudan was heavily diminished by the secession. Crude oil production declined from about 130 000 barrels per day in 2013 to 72 000 barrels per day in 2019.[9]

Oil accounted for 86% of the total energy produced in Sudan in 2019 (73 million barrels of oil). On the Current Path, oil will account for 37% of energy production by 2043. The energy production from other renewable sources is currently in the embryonic stage. However, the share of other renewable energy in the total energy production is forecast to exceed that of oil by 2040 to reach 58% by 2043 versus 37% for oil and 5% for hydro.

**Chart 12: Carbon emissions in CP, 1990–2043**  
 Million tons of carbon (note, not CO<sub>2</sub> equivalent)



Source: IFs 7.63 initialising from Carbon Dioxide Information Analysis Center data

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Carbon is released in many ways, but the three most important contributors to greenhouse gases are carbon dioxide (CO<sub>2</sub>), carbon monoxide (CO) and methane (CH<sub>4</sub>). Since each has a different molecular weight, IFs uses carbon. Many other sites and calculations use CO<sub>2</sub> equivalent.

Annual carbon emissions were 6.9 million tons in 2019. On Sudan's current development trajectory, carbon emissions are forecast to reach 16.9 million tons by 2043 — an increase of about 145% between 2019 and 2043. However, Sudan's total carbon emissions in 2043 will only constitute about 0.002% of global carbon emissions.

Developed economies must help Sudan and the many other developing African countries deal with the impact of climate change, which will disproportionately affect them.

## Sectoral Scenarios for Sudan

- Stability scenario
- Demographic scenario
- Health/WaSH scenario
- Agriculture scenario
- Education scenario
- Manufacturing scenario
- Leapfrogging scenario
- Free Trade scenario
- Financial Flows scenario
- Infrastructure scenario
- Governance scenario
- Impact of scenarios on carbon emissions

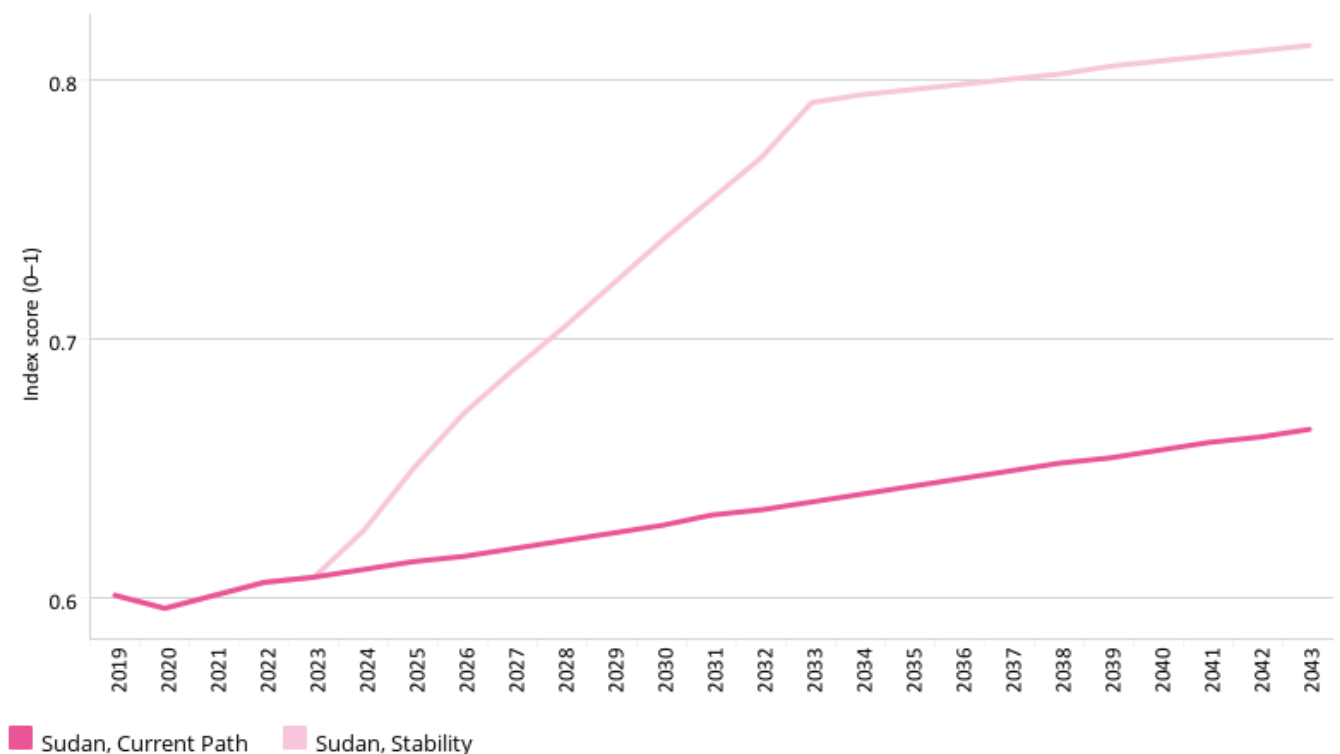


### Stability scenario

Chart 13: Governance security in CP and Stability scenario, 2019–2043  
IFs index 0–1



Sudan



Source: IFs 7.63 governance security index using internal war and government risk

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The Stability scenario represents reasonable but ambitious reductions in the risk of regime instability and lower levels of

internal conflict. Stability is generally a prerequisite for other aspects of development and this would encourage inflows of foreign direct investment (FDI) and improve business confidence. Better governance through the accountability that follows substantive democracy is modelled separately.

The intervention is explained [here](#) in the thematic part of the website.

Sudan has long been beset by conflict and instability. Two rounds of north-south civil war cost the lives of 1.5 million people, and a continuing conflict in the western region of Darfur has driven 2 million people from their homes and killed more than 200 000.<sup>[10]</sup> Also, continuous food price hikes and long-standing grievances over nearly 30 years of rule led to mass demonstrations starting in December 2018 and culminated in the removal of then-president al-Bashir from power in April 2019. This led to the formation of a transitional government in September 2019.

The Transitional Government of Sudan enacted ambitious economic and social reforms and engaged in peace negotiations with armed groups to address armed conflicts and grievances. This ultimately led to the signing of the Juba Peace Agreement with nearly all armed opposition in October 2020. Unfortunately, a military takeover took place in October 2021. Key government structures were dissolved and terms of the 2019 constitutional charter suspended. In early January 2022 the prime minister stepped down after his efforts to reach a political settlement between domestic stakeholders failed.

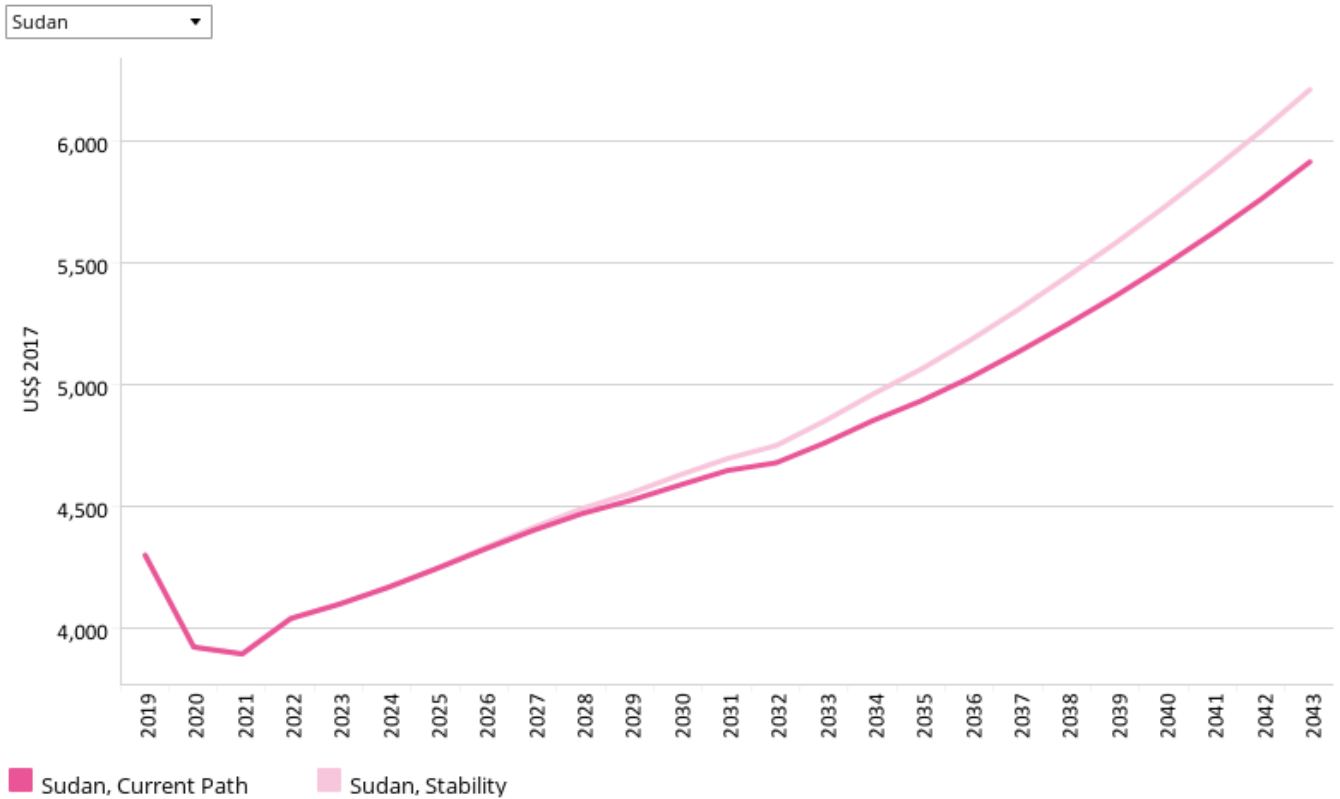
IFs' governance security index ranges from 0 (low security) to 1 (high security). The Current Path forecast shows lower stability in Sudan than the average for low-income Africa. The score for Sudan on the government security index was 0.60 in 2019 compared to 0.64 for Africa low-income countries.

The scenario improves security and stability in Sudan. By 2043, the score in the Stability scenario is 0.81, about 21% higher than the Current Path forecast and 14% higher than the projected average of 0.71 on the Current Path for African low-income countries.

A state's capacity to maintain order is the most important condition for development. The government and policymakers in Sudan should take proactive measures for more social and political stability.



Chart 14: GDP per capita in CP and Stability scenario, 2019–2043  
Purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

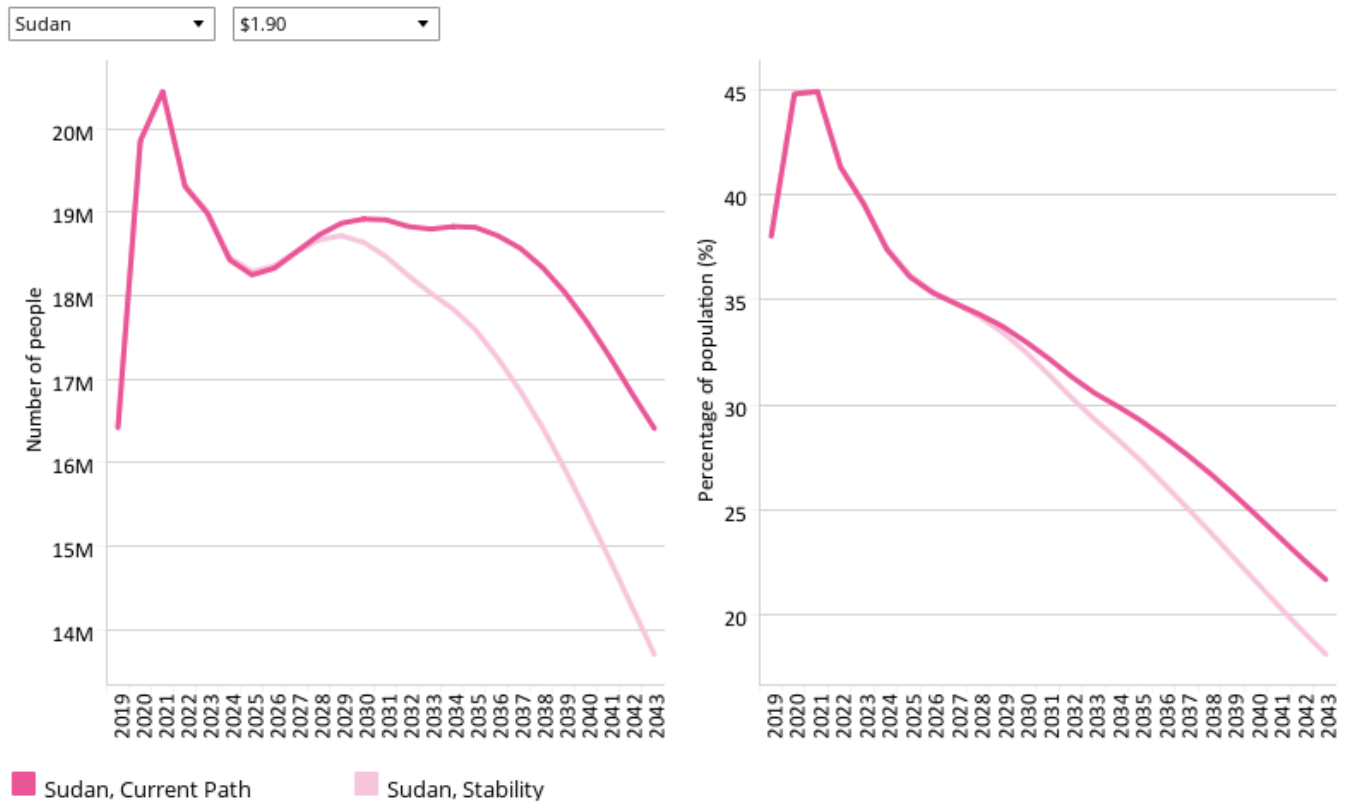
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Increased stability would promote peace and political consensus in the country and encourage more significant domestic and foreign investment, positively affecting income per capita growth.

Thus, by 2033 Sudan's GDP per capita would be US\$91 higher in the Stability scenario compared to the Current Path forecast for that year. In 2043, the difference would increase to US\$297, with Sudan recording a GDP per capita of US\$6 215 — 5% higher than the Current Path forecast of US\$5 918. However, Sudan's GDP per capita in the Stability scenario would be above the projected average for African low-income countries in 2043.

**Chart 15: Poverty in CP and Stability scenario, 2019–2043**  
Millions of people and % of total population



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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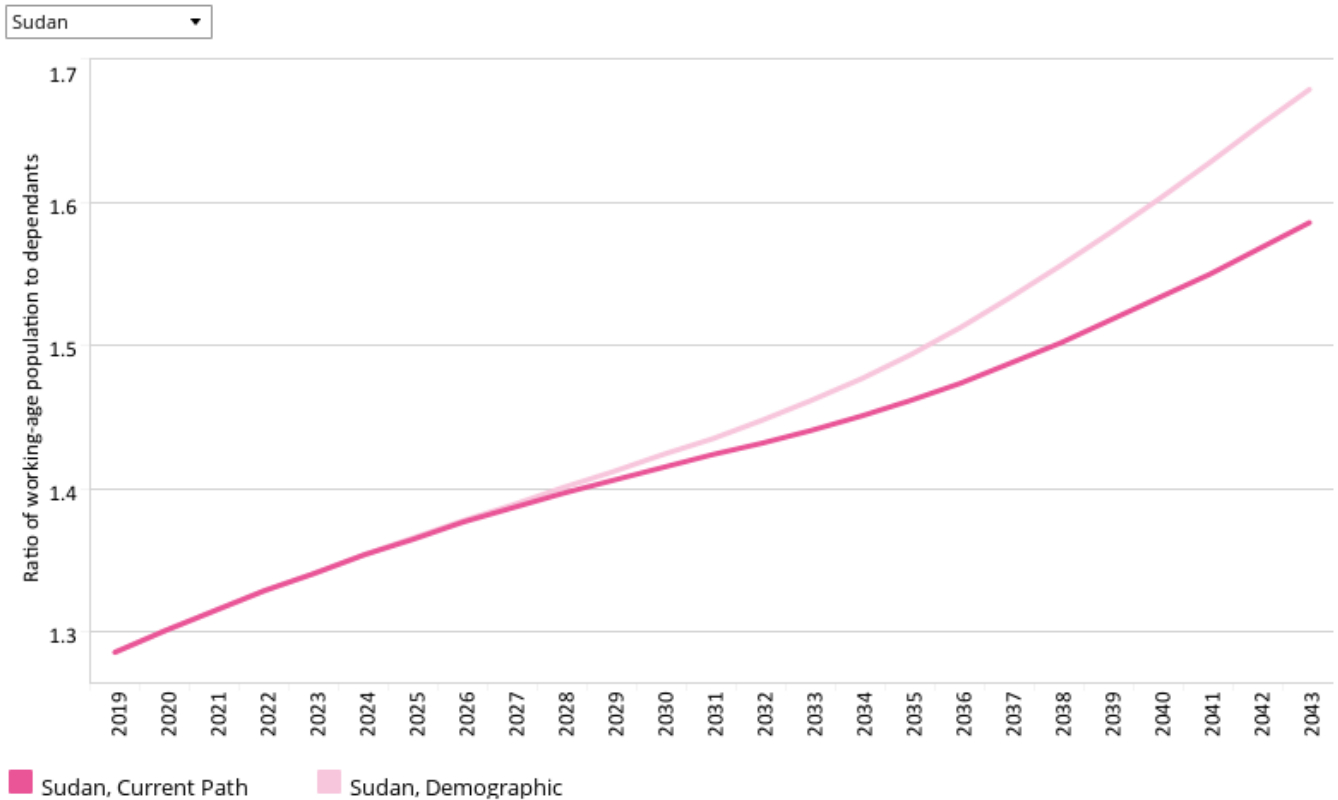
Stability in a country is an essential condition for economic growth and poverty reduction. When using the low-income countries' extreme poverty threshold of US\$1.90, 16.4 million Sudanese (38% of the population) were considered to be extremely poor in 2019.

In the Stability scenario, the number of poor people stands at 13.7 million (18.1% of the population) in 2043 compared to 16.4 million (21.7% of the population) in the Current Path forecast for that year — a difference of 2.7 million fewer people in extreme poverty. The poverty rate in the Stability scenario (at US\$1.90 per day) in 2043 is below the projected average of 25.2% for Africa low-income countries in the Current Path forecast.



## Demographic scenario

Chart 16: Demographic dividend in CP and Demog scenario, 2019–2043  
Ratio of working-age population to dependants



Source: IFs 7.63 initialising from UN Population Division Population Prospects

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This section presents the impact of a Demographic scenario that aims to hasten and increase the demographic dividend through reasonable but ambitious reductions in the communicable-disease burden for children under five, the maternal mortality ratio and increased access to modern contraception.

The intervention is explained [here](#) in the thematic part of the website.

Demographers typically differentiate between a first, second and even a third demographic dividend. We focus here on the contribution of the size of the labour force (between 15 and 64 years of age) relative to dependants (children and the elderly) as part of the first dividend. A window of opportunity opens when the ratio of the working-age population to dependants is equal to or surpasses 1.7.

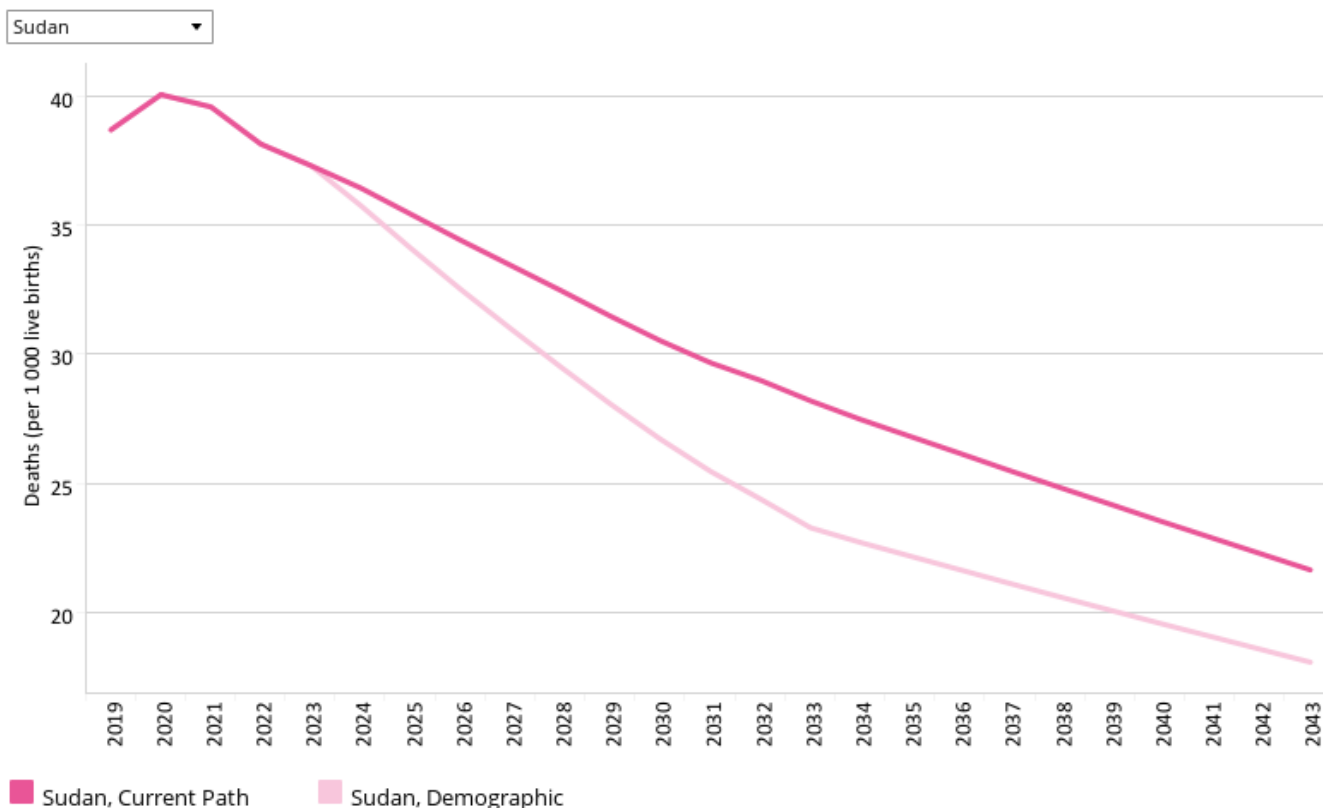
In 2019, the ratio of the working-age population to dependants stood at 1.3, meaning that there was almost one person of working age for each dependant. On the Current Path, it is forecast to be 1.6 by 2043. In the Demographic scenario, the working-age population to dependants ratio is 1.7, the minimum ratio required to expect the materialisation of the demographic dividend.

The increasing size of the working-age population in Sudan can be a catalyst for growth if sufficient education and employment is generated to successfully harness their productive power, otherwise it could turn into a demographic

'bomb', as many people of working age may remain in poverty, potentially creating frustration, social tension and conflict.

### Chart 17: Infant mortality in CP and Demog scenario, 2019–2043

Deaths per 1 000 live births



Source: IFs 7.63 initialising from Institute for Health Metrics and Evaluation Mortality Visualization Tool data

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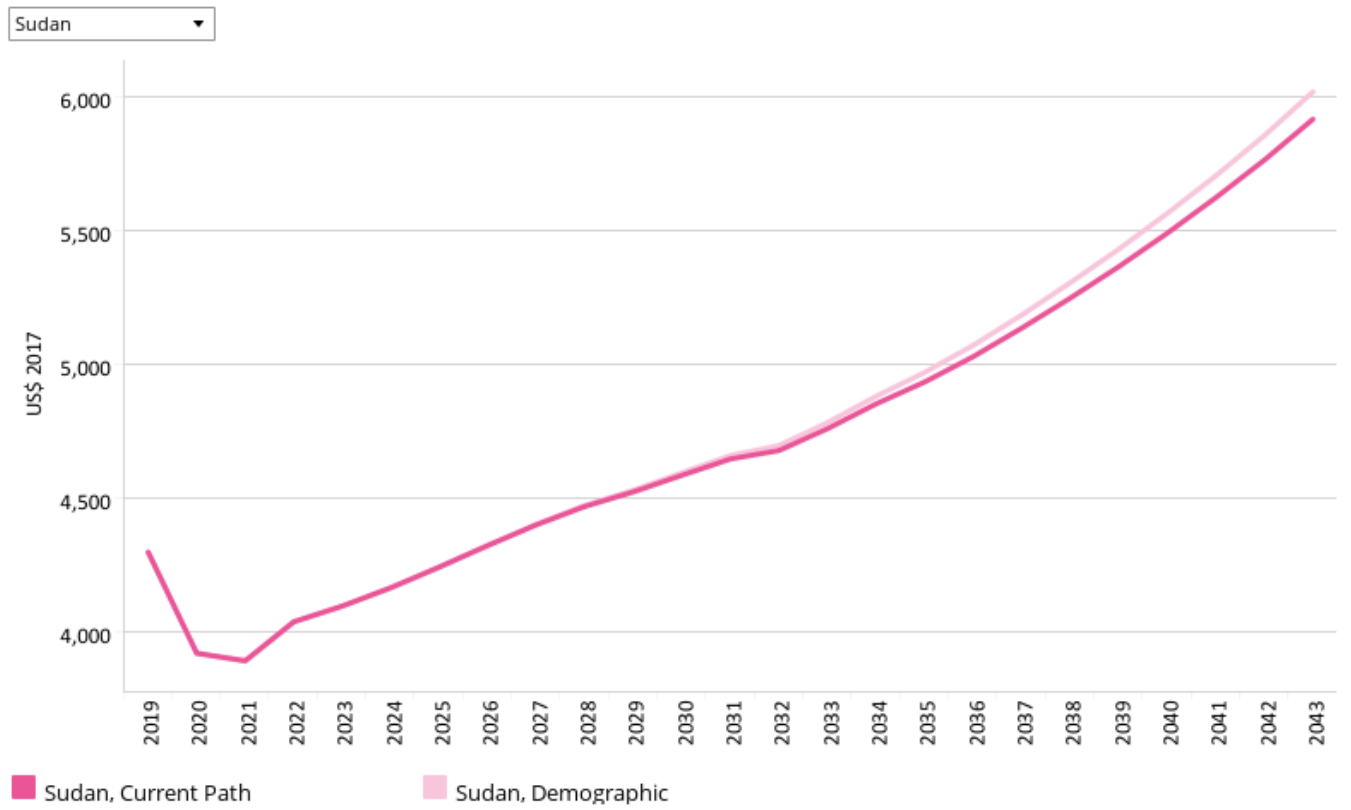
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The infant mortality rate is the number of infant deaths per 1 000 live births and is an important marker of the overall quality of the health system in a country.

As of 2019, the infant mortality rate in Sudan was 38.7 deaths per 1 000 live births, below the average of 48.5 for Africa's low-income countries. The Demographic scenario reduces infant mortality to 23.3 per 1 000 live births compared to 28.2 in the Current Path forecast by 2033. By 2043, the infant mortality rate will be 18.1 deaths per 1 000 live births in the Demographic scenario, compared to 21.7 in the Current Path forecast.

The infant mortality rate in the scenario is about 3 percentage points below the average for low-income countries in Africa at 21.2 deaths per 1 000 live births by 2043.

Chart 18: GDP per capita in CP and Demog scenario, 2019–2043  
Purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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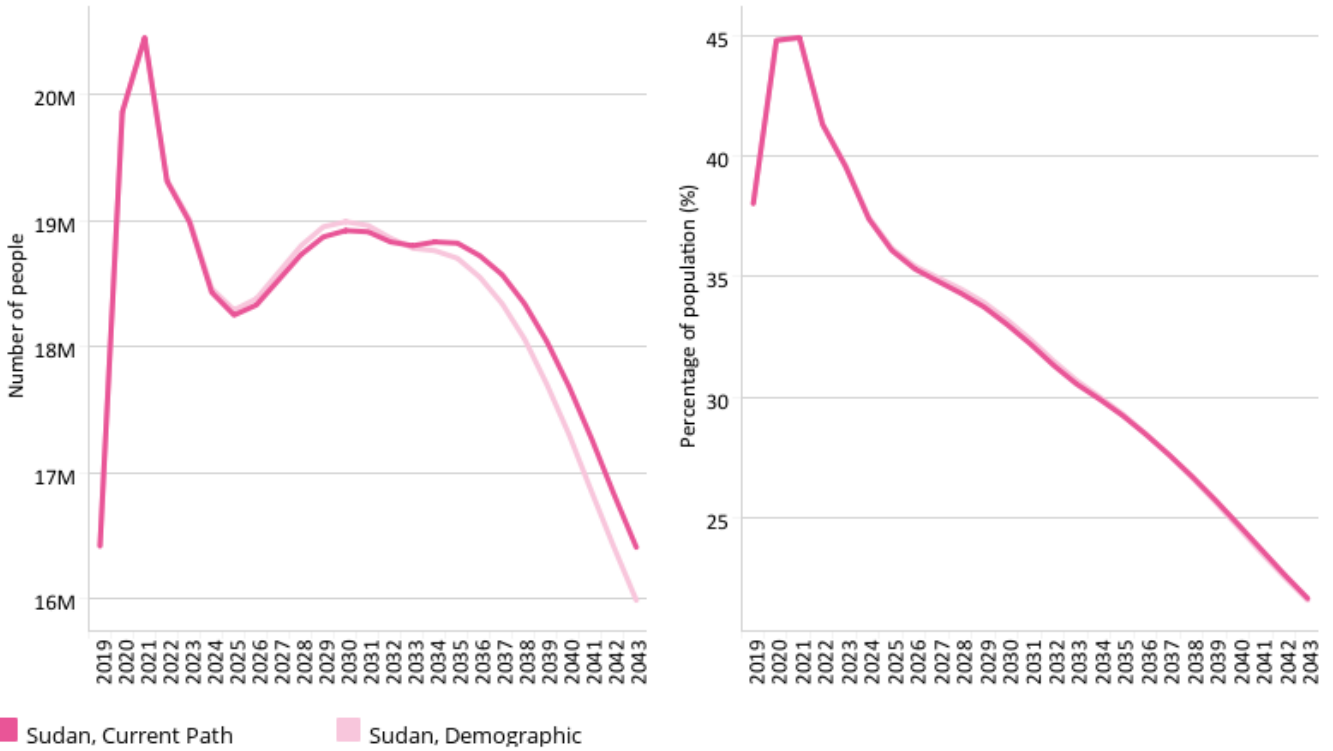
The Demographic scenario's impact on per capita income is marginal at US\$23 more than the Current Path forecast of US\$4 760 in 2033. By 2043, the average Sudanese will have about US\$102 more than in the Current Path forecast at US\$6 020 — a 1.7% improvement above the Current Path forecast. However, this would be US\$2 230 lower than the average for Africa low-income countries in the Current Path forecast in 2043.



**Chart 19: Poverty in CP and Demog scenario, 2019–2043**  
Millions of people and % of total population



Sudan \$1.90



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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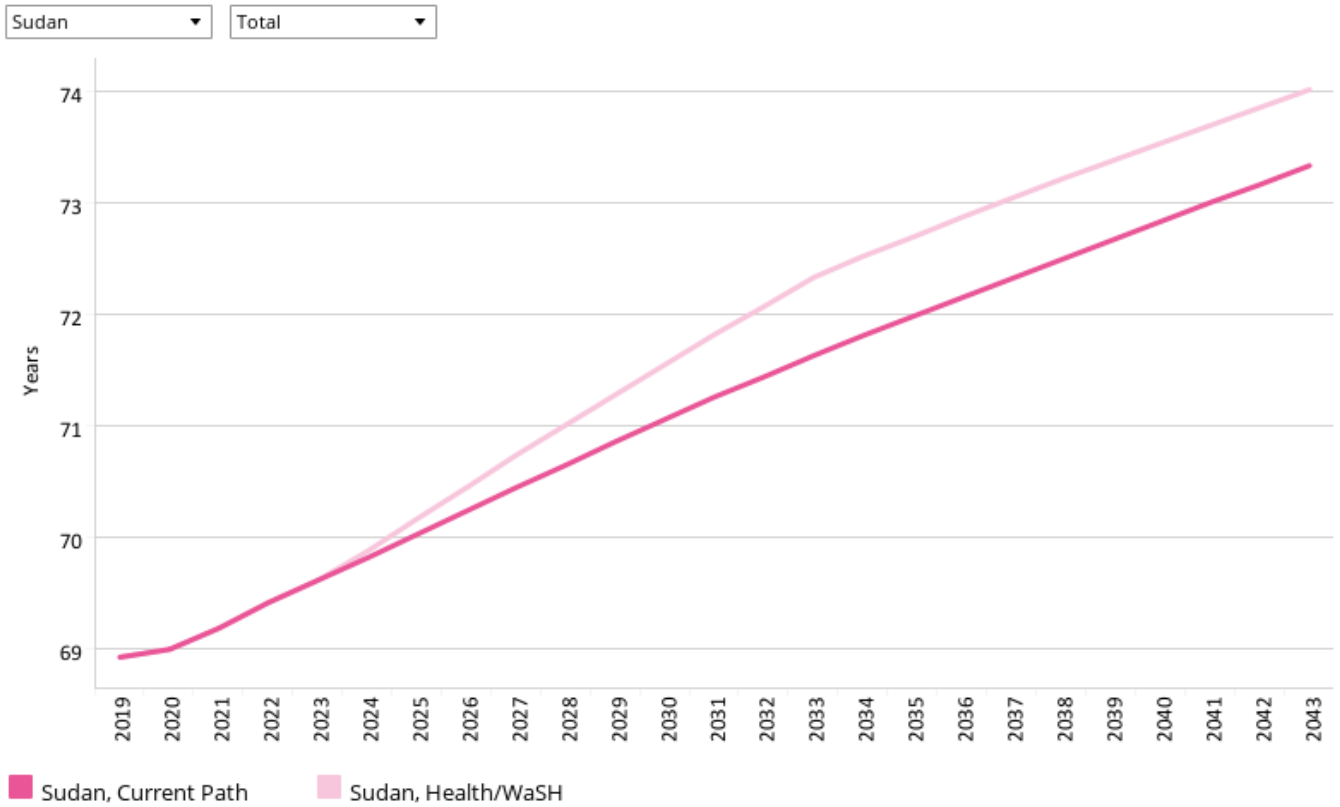
When using the low-income countries' extreme poverty threshold of US\$1.90, 16.4 million people in Sudan (38% of the population) were considered to be extremely poor in 2019. The number of poor people stands at 15.99 million (21.6% of the population) by 2043 in the Demographic scenario compared to 16.4 million people (21.7% of the population) in the Current Path forecast for that year, a difference of 400 000 fewer people in extreme poverty.

The poverty rate in the Demographic scenario in 2043 is below the Current Path forecast average of 25.1% for Africa low-income countries. Sudanese authorities should try to accelerate the demographic transition, which can be another source of growth and poverty reduction.



## Health/WaSH scenario

### Chart 20: Life expectancy in CP and Health/WaSH scenario, 2019–2043



Source: IFs 7.63 initialising from Institute for Health Metrics Evaluation GBD Foresight Tool data

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This section presents reasonable but ambitious improvements in the Health/WaSH scenario, which include reductions in the mortality rate associated with both communicable diseases (e.g. AIDS, diarrhoea, malaria and respiratory infections) and non-communicable diseases (NCDs) (e.g. diabetes), as well as improvements in access to safe water and better sanitation. The acronym WaSH stands for water, sanitation and hygiene.

The intervention is explained [here](#) in the thematic part of the website.

The quality of a nation's health system can be gauged through indicators such as life expectancy, maternal mortality, and infant mortality, among others. Life expectancy in Sudan was 68.9 years in 2019, above the average of 63.7 years for low-income countries in Africa.

Based on the Health/WaSH scenario, life expectancy is estimated to increase to 74.2 years compared to 73.3 years in the Current Path forecast by 2043. In the Health/WaSH scenario, life expectancy in Sudan is more than 3 years above the projected average for low-income countries in Africa, at 70.8 years in 2043.

On average, females have a higher life expectancy at birth of 70.9 years compared to 66.9 years for males in 2019.

In the Health/WaSH scenario, life expectancy at birth for females is projected to be 76.5 years by 2043 compared to 71.5

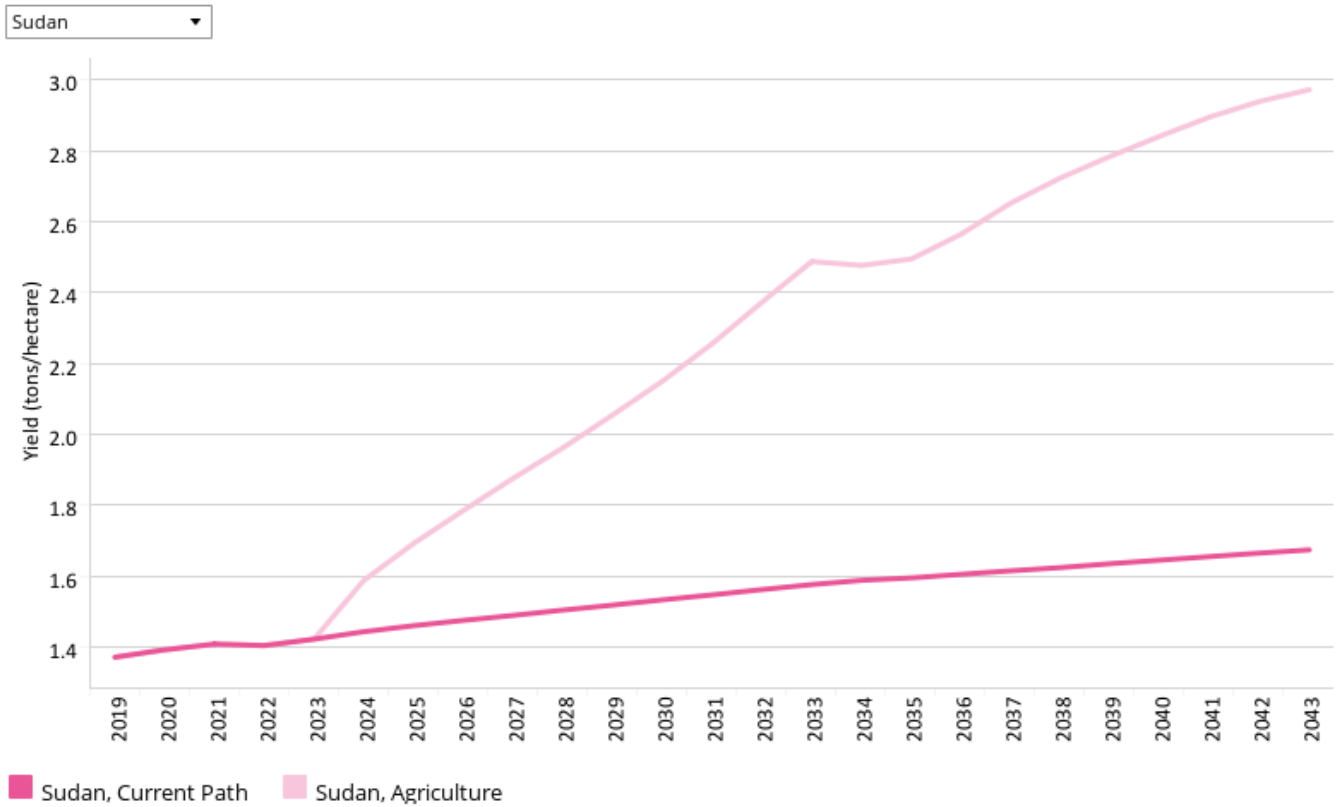




## Agriculture scenario

### Chart 22: Yield/hectare in CP and Agric scenario, 2019–2043

Pre-loss levels



Source: IFs 7.63 initialising from FAOSTAT on-line statistical service data

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The Agriculture scenario represents reasonable but ambitious increases in yields per hectare (reflecting better management and seed and fertiliser technology), increased land under irrigation and reduced loss and waste. Where appropriate, it includes an increase in calorie consumption, reflecting the prioritisation of food self-sufficiency above food exports as a desirable policy objective.

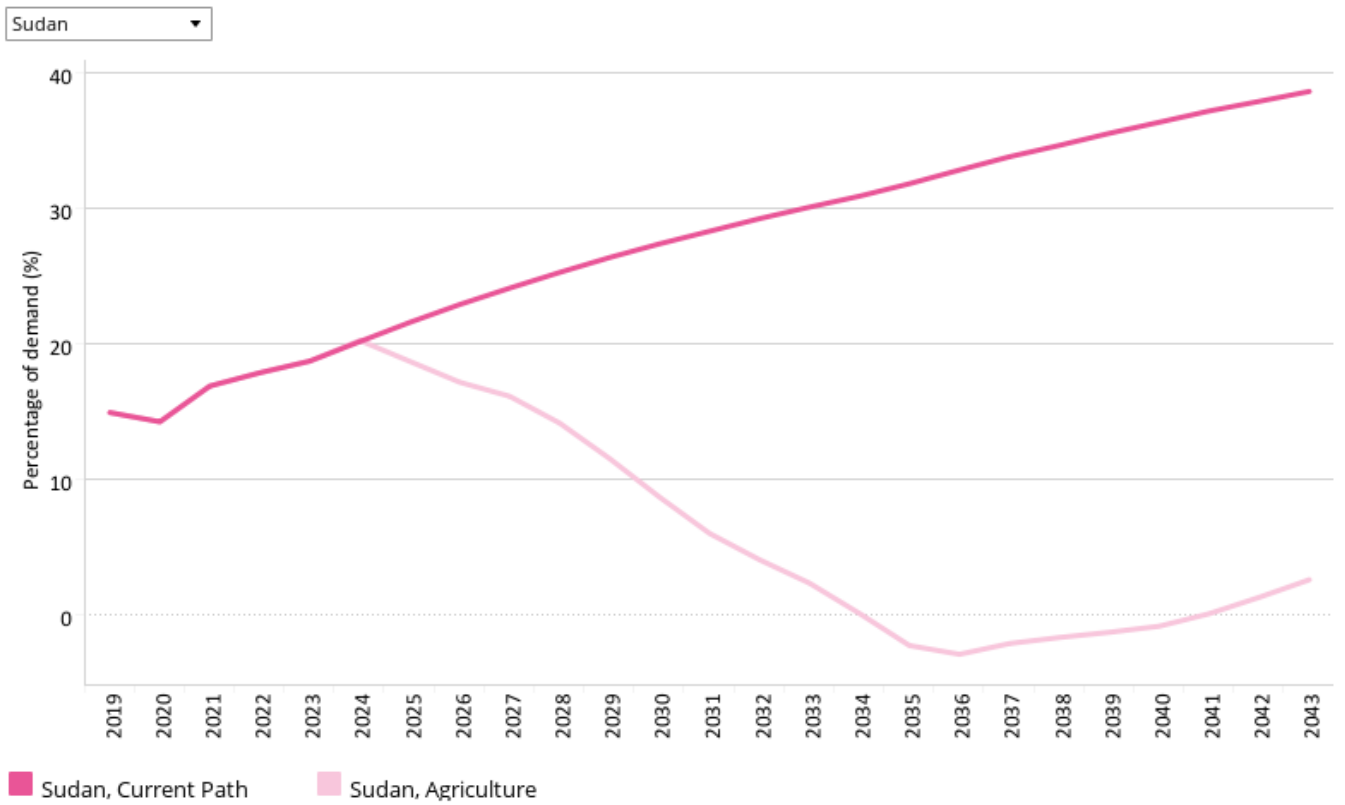
The intervention is explained [here](#) in the thematic part of the website.

The data on yield per hectare (in metric tons) is for crops but does not distinguish between different categories of crops.

Agriculture is the backbone of the Sudanese economy. The majority of Sudanese people live in rural areas and depend on agricultural production as the main source of their income and food security. As is the case in much of eastern Africa, farmers rely heavily on rain-fed crop production, meaning erratic or delayed rains can result in poor harvests. A lack of availability and access to quality seeds and planting materials constrains crop yields.

In the Agriculture scenario, crop yields in Sudan improve from 1.4 tons per hectare in 2019 to 2.97 tons per hectare in 2043, compared to 1.7 tons in the Current Path forecast. This is more than twice the value forecast on the Current Path in 2043. Average crop yields in the Agriculture scenario by 2043 are below the projected average for low-income Africa at 3.5 tons per hectare in the Current Path forecast for that year.

**Chart 23: Agriculture imports in CP and Agric scenario, 2019–2043**  
 Net imports for meat, crops and fish, % of demand



Source: IFs 7.63 initialising from Food and Agriculture Organization Food Balance Sheets data

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Without significant efforts to improve agricultural production, the current low crop yield will continue to make Sudan a net food importer for the foreseeable future. On the Current Path, food import dependence will be about 38.6% of total agricultural demand by 2043, up from 14.9% in 2019. However, in the Agriculture scenario, food import dependence significantly declines from 14.9% of total demand in 2019 to 2.6% by 2043.





**Chart 25: Poverty in CP and Agric scenario, 2019–2043**  
Millions of people and % of total population



Sudan \$1.90



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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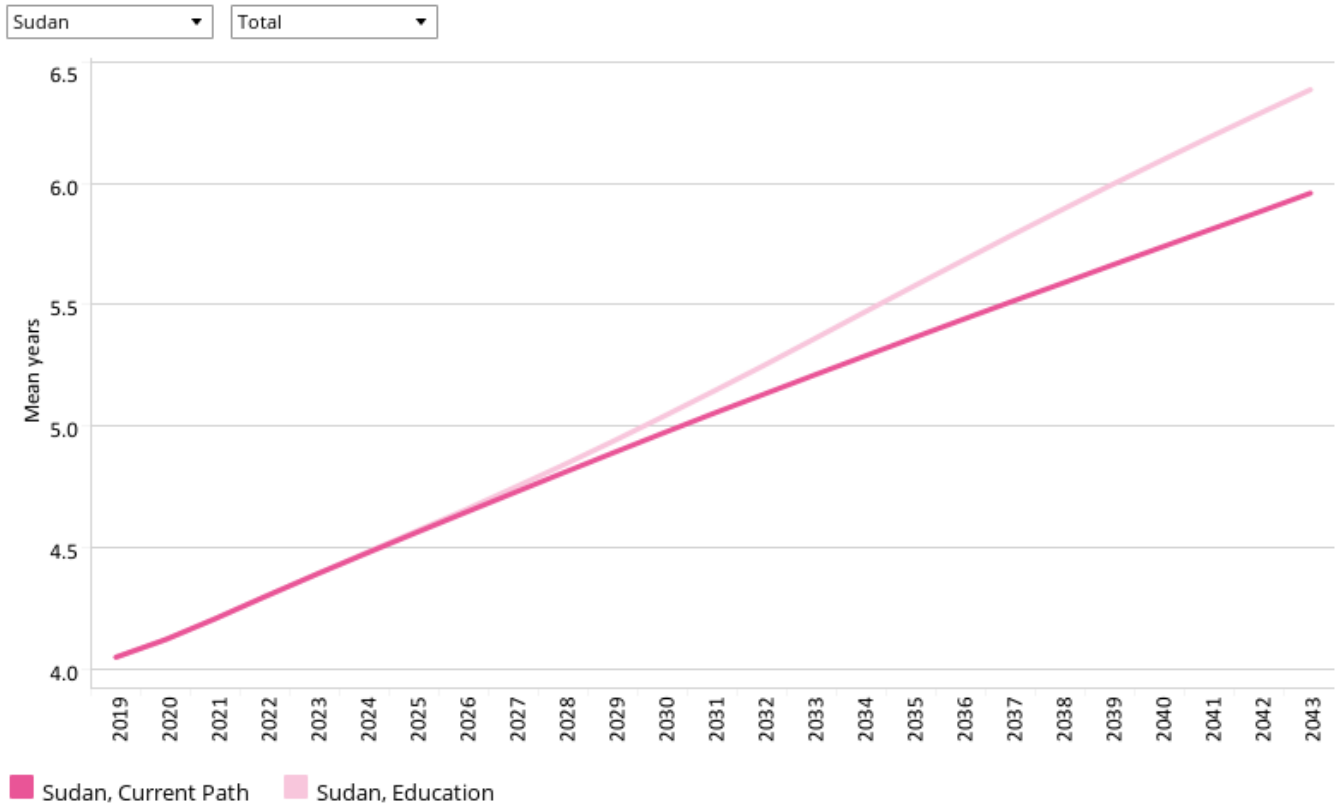
The agriculture sector is a crucial lifeline for millions of people in Sudan as the sector employs about 80% of the workforce.

Using the US\$1.90 per person per day extreme poverty threshold, the poverty rate in the Agriculture scenario by 2043 is 17.2%, compared to 21.7% in the Current Path forecast for the same year. This is equivalent to 3.45 million fewer people living in extreme poverty. Further development in the agriculture sector is a viable way of reducing poverty in Sudan. More investment in the sector will increase consumption and income, and even pave the way for agro-processing, positively affecting growth and poverty reduction.



## Education scenario

Chart 26: Mean years of education in CP and Educ scenario, 2019–2043  
Mean years of adult (+15) education



Source: IFs 7.63 initialising from Barro-Lee data

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The Education scenario represents reasonable but ambitious improved intake, transition and graduation rates from primary to tertiary levels and better quality of education. It also models substantive progress towards gender parity at all levels, additional vocational training at secondary school level and increases in the share of science and engineering graduates.

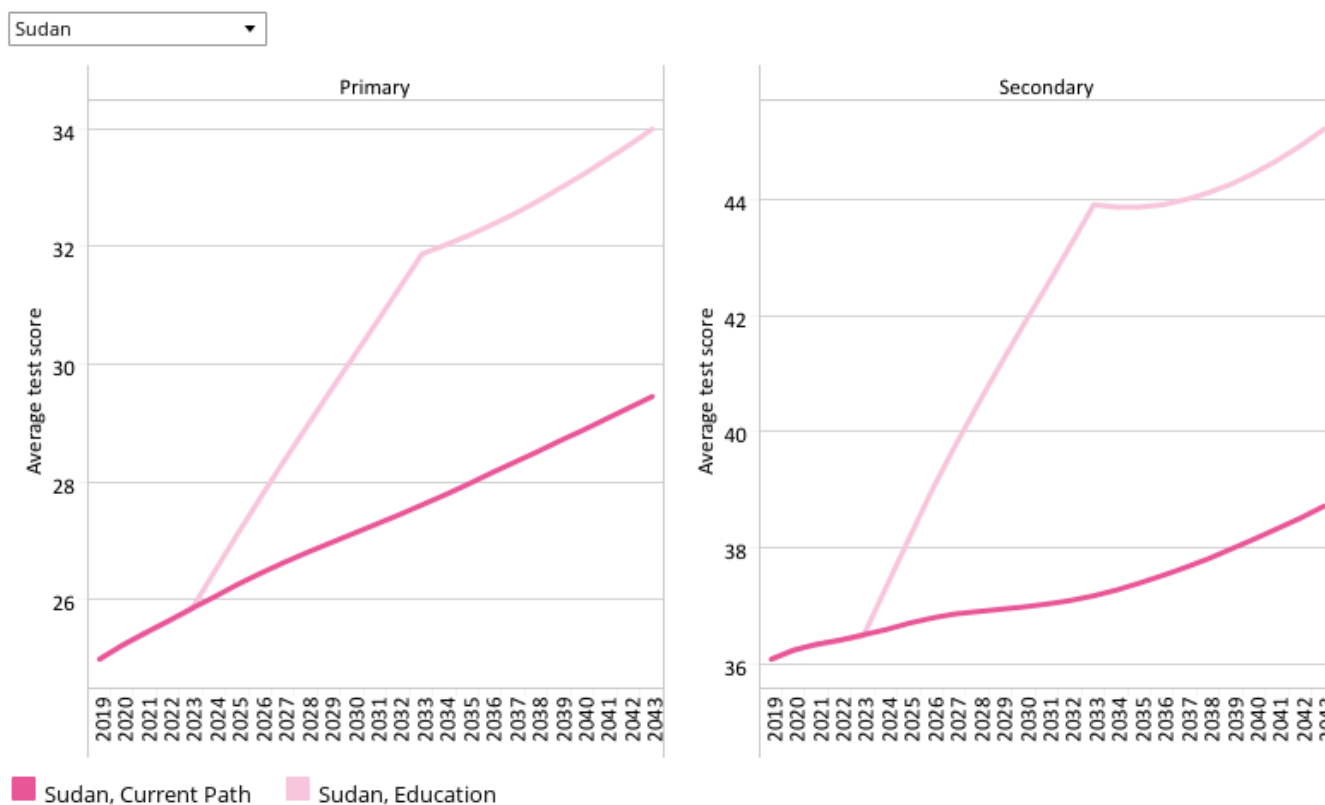
The intervention is explained [here](#) in the thematic part of the website.

Sudan has one of the largest numbers of out-of-school children in the Horn of Africa. It's estimated that over 3 million children, aged 5 to 13 years, are not in the classroom.[11] Conflict, a lack of awareness about the importance of education and chronic under-development all contribute to the poor schooling of boys and girls in Sudan. The inability to pay fees—even though school is free per government policy—prevents many poor families from sending children to school. Finally, cultural pressures and the traditional views of the role of women mean fewer girls attend and remain in school.

The average years of education in the adult population (aged 15 years and older) is a good indicator of the stock of education in a country. The average years of education for adults aged 15 years and older stood at 4 years in 2019, and on the Current Path, it is projected to improve to 6 years by 2043. Technically, this means that most people in Sudan will have primary education by 2043. In the Education scenario, the mean years of education improves by about five months above the Current Path forecast for 2043.

The situation facing girls at all ages is particularly alarming in Sudan. The mean years of education for males in 2019 was 4.4 compared to 3.8 for females. In the Education scenario, mean years of education for males and females converge at 6.4 years by 2043.

**Chart 27: Education quality in CP and Educ scenario, 2019–2043**  
Average test scores for primary and secondary learners



Source: IFs 7.63 initialising from World Bank EDSTATS

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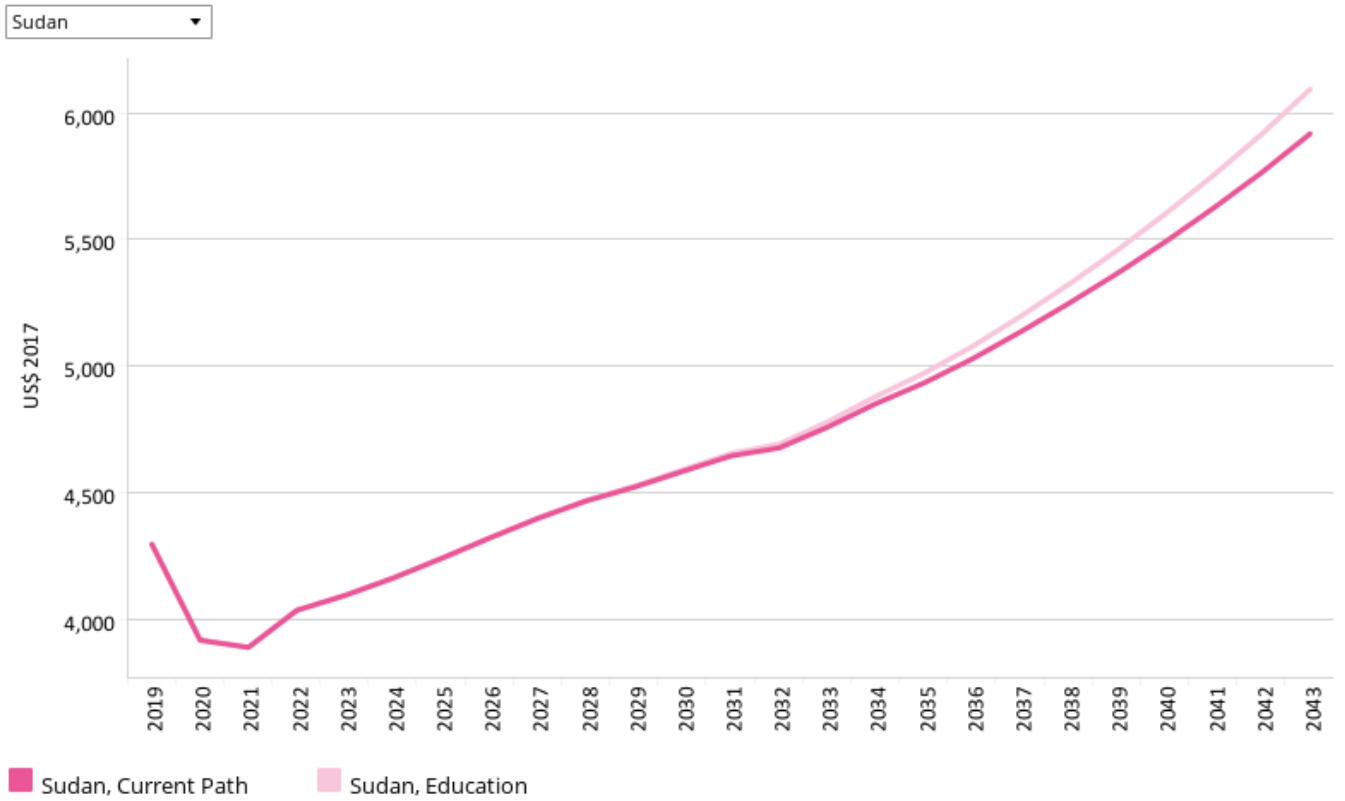
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Even if all the barriers to education are somehow overcome, once in the classroom the quality of learning is below the required standards. The Ministry of Education identified 3 692 unqualified teachers in South and East Darfur out of a total number of 7 315 employed teachers.[12] Many teachers in Sudan have been found to be untrained, under supervised and unequally distributed between rural and urban areas. In these schools, instruction consisted of rote learning, the school environments themselves were often unfriendly with inadequate separate sanitation facilities for girls, and teaching materials tended to be inappropriate, outdated or non-existent.[13]

In the Education scenario, the score for the quality of primary education improves from 25 in 2019 to 34 in 2043 — a 15.2% increase compared to the Current Path forecast of 29.5 in the same year. The score for the quality of secondary education increases from 36.1 in 2019 to 45.2 in 2043 in the scenario — a 16.8% improvement compared to the Current Path forecast of 38.7 in 2043.

Quality education is crucial for economic development. It allows the country to increase its current added value and create tomorrow's technological innovations. Thus, authorities in Sudan should accelerate reforms to improve the quality of education in the country.

Chart 28: GDP per capita in CP and Educ scenario, 2019–2043  
Purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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By 2043, the Education scenario will increase GDP per capita by US\$175 above the US\$5 918 in the Current Path forecast — an increase of 3% above the Current Path forecast.

Investment in education significantly impacts economic growth, but it takes time to materialise. For instance, it will take more than a decade for a child enrolled in primary school to contribute meaningfully to the economy.



**Chart 29: Poverty in CP and Educ scenario, 2019–2043**  
Millions of people and % of total population



Sudan \$1.90



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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Education is one of the most important tools for reducing poverty: it improves the employment and income prospects of the poor segment of society. By 2043, Sudan will record a poverty rate of 20.3% (15.3 million people) in the Education scenario, compared to 21.7% (16.4 million people) in the Current Path forecast. This means 1.1 million fewer people will live in extreme poverty than in the Current Path forecast for 2043.



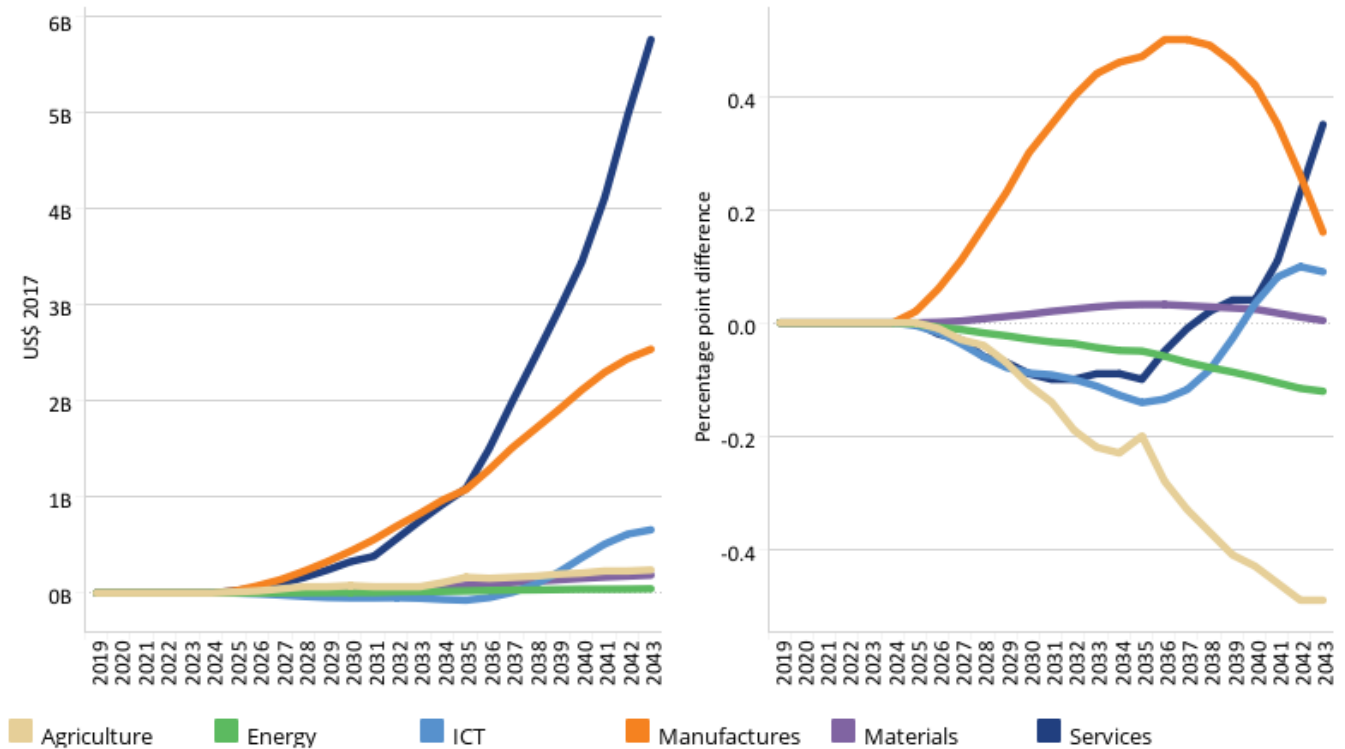
## Manufacturing scenario

### Chart 30: Value added by sector in CP and Manufac/Transfers scenario, 2019-2043



Absolute and % point difference GDP

Sudan



Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

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The Manufacturing/Transfers scenario represents reasonable but ambitious manufacturing growth through greater investment in the economy, investments in research and development, and promotion of the export of manufactured goods. It is accompanied by an increase in welfare transfers (social grants) to moderate the initial increases in inequality that are typically associated with a manufacturing transition. To this end, the scenario improves tax administration and increases government revenues.

The intervention is explained [here](#) in the thematic part of the website.

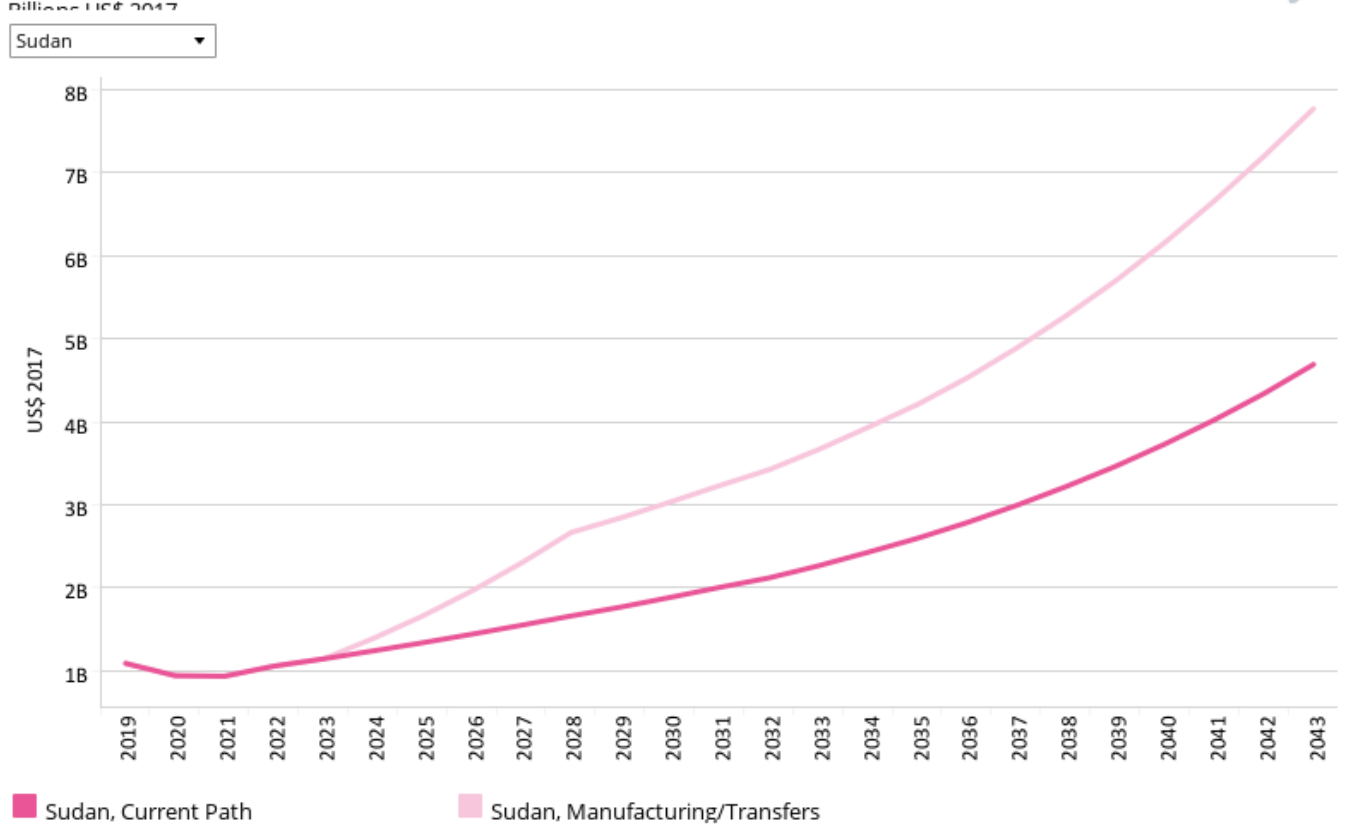
Chart 30 should be read with [Chart 8](#) that presents a stacked area graph on the contribution to GDP and size, in billion US\$, of the Current Path economy for each of the sectors.

In absolute terms, the contribution of the service sector to GDP has the most significant improvement compared to the Current Path forecast in 2043. It is forecast to be US\$5.8 billion larger than in the Current Path forecast. The service sector is followed by the manufacturing sector, with its contribution of US\$2.5 billion above the Current Path in 2043.

As a percentage of GDP, the share of the service sector in GDP is 0.35 percentage point larger in the scenario than in the Current Path forecast in 2043. The manufacturing sector follows with 0.16 percentage points above the Current Path forecast. The share of the agriculture sector declines by 0.5 percentage points compared to the Current Path forecast,

indicating the structural transformation of the economy.

Chart 31: Gov welfare transfers in CP and Manufac/Transfers scenario, 2019-2043



Source: IFs 7.63 initialising from World Development Indicators data

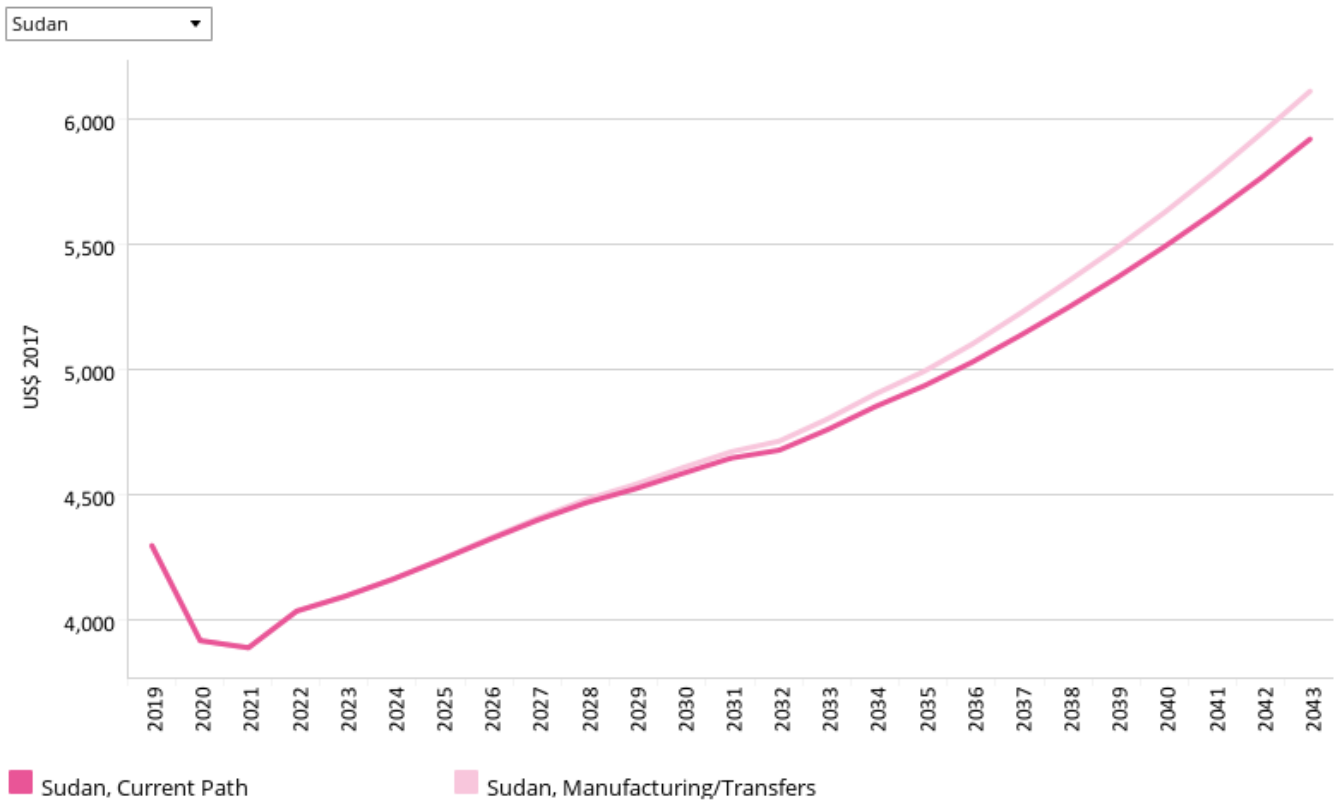
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Compared to the Current Path forecast, the Manufacturing/Transfers scenario increases household transfers and welfare by 65.9% in 2043. This represents US\$3.1 billion more than the Current Path forecast of US\$4.7 billion. These transfers will be needed to address the initial increase in poverty associated with the investment in the manufacturing sector.

Industrialisation is often funded by an initial crunch in consumption, increasing poverty in the first few years. However, these efforts stimulate inclusive growth with a greater impact on poverty alleviation in the long term.

To make the social safety net programmes more effective at reducing poverty, better targeting and efficient approaches are critical.

Chart 32: GDP per capita in CP and Manufac/Transfers scenario, 2019–2043  
Purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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Manufacturing is important for economic growth due to its backward and forward linkages with other sectors and its ability to transform the productivity structures across an economy. Thus, a robust manufacturing sector is crucial for sustained growth and significantly improves the population's living standard.

In the Manufacturing/Transfers scenario, GDP per capita is US\$190 higher than the US\$5 918 in the Current Path forecast by 2043 — an increase of 3.2%.

### Chart 33: Poverty in CP and Manufac/Transfers scenario, 2019–2043

Millions of people and % of total population



Sudan \$1.90



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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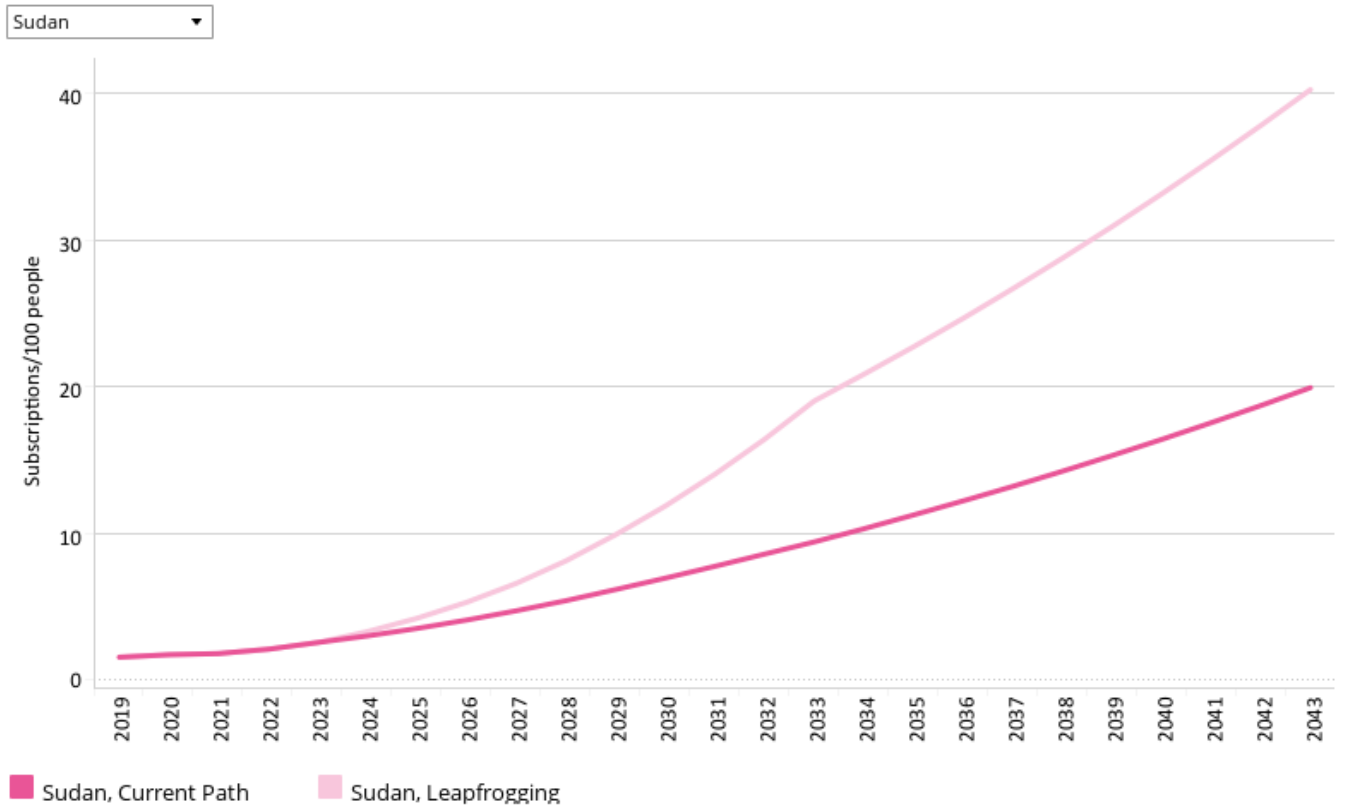
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At the poverty threshold of US\$1.90, 16.4 million people in Sudan (38% of the population) were considered to be extremely poor in 2019. The number of poor people by 2043 will stand at 15.3 million (20.2% of the population) in the Manufacturing/Transfers scenario compared to 16.4 million (21.7% of the population) in the Current Path forecast for that year — a difference of 1.1 million people. The poverty rate in the Manufacturing/Transfers scenario in 2043 is 5 percentage points below the average in the Current Path forecast for Africa low-income countries.



## Leapfrogging scenario

Chart 34: Fixed broadband access in CP and Leapfrogging scenario, 2019–2043  
Subscriptions per 100 people



Source: IFs 7.63 initialising from International Telecommunication Union data

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The Leapfrogging scenario represents a reasonable but ambitious adoption of and investment in renewable energy technologies, resulting in better access to electricity in urban and rural areas. The scenario includes accelerated access to mobile and fixed broadband and the adoption of modern technology that improves government efficiency and allows for the more rapid formalisation of the informal sector.

The intervention is explained [here](#) in the thematic part of the website.

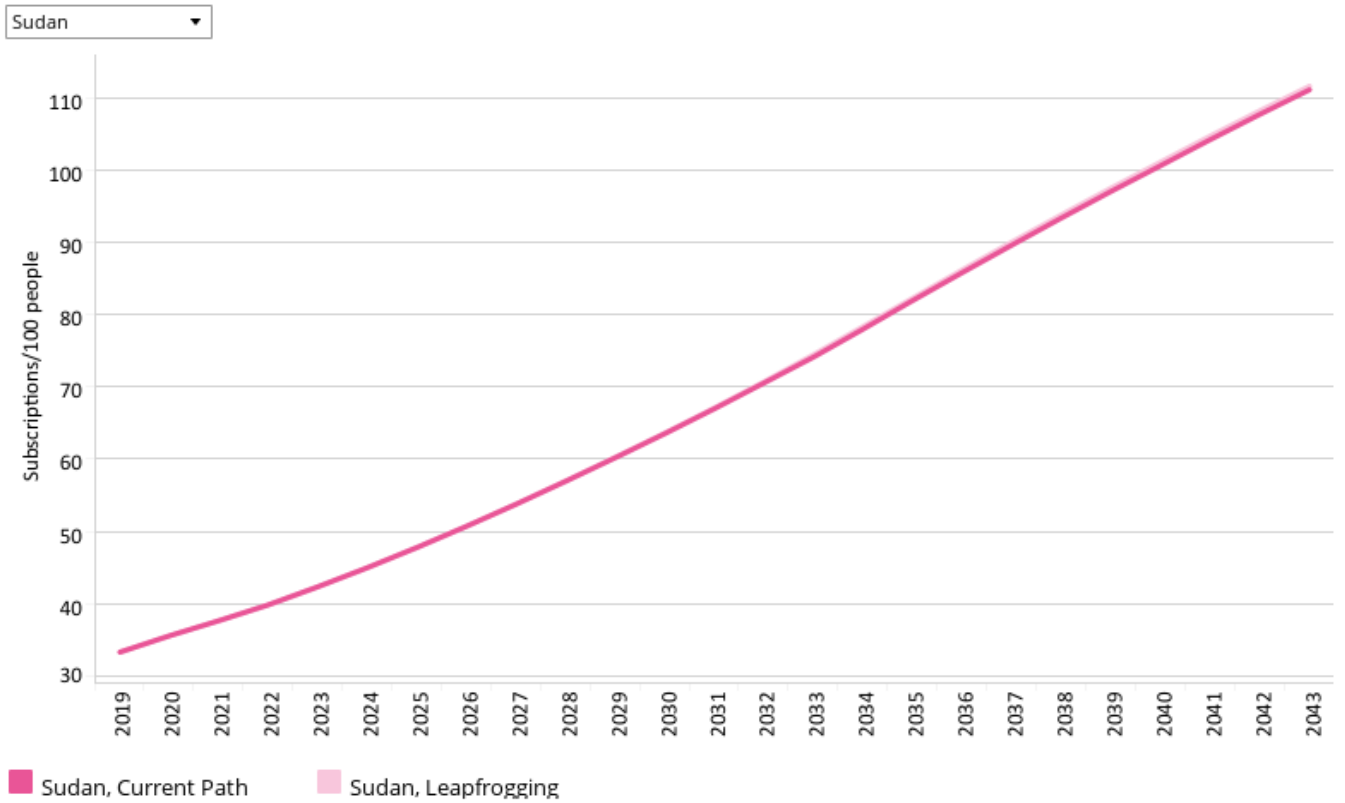
Fixed broadband includes cable modem Internet connections, DSL Internet connections of at least 256 KB/s, fibre and other fixed broadband technology connections (such as satellite broadband Internet, ethernet local area networks, fixed-wireless access, wireless local area networks, WiMAX, etc.).

Widespread access to high-speed Internet has the potential to improve a country's socio-economic outcomes. Broadband can increase productivity, reduce transaction costs and optimise supply chains, positively affecting economic growth.

Sudan has one of the most liberalised ICT sectors in Africa. Recent connection to an undersea fibre optic cable has led to access extensions, efficiency upgrades and reduced telecommunications costs. In Sudan, 31% of the population are Internet users, placing the country at a far higher pace relative to all the Horn of Africa nations (except Djibouti).[14]

Fixed broadband subscriptions stood at 1.6 per 100 people in 2019 compared to the average of 2.3 for low-income countries in Africa. In the Leapfrogging scenario, fixed broadband subscriptions increase to 40.3 per 100 people by 2043, more than double the Current Path forecast of 19.9 subscriptions per 100 people for the same year.

**Chart 35: Mobile broadband access in CP and Leapfrogging scenario, 2019–2043**  
Subscriptions per 100 people



Source: IFs 7.63 initialising from International Telecommunication Union data

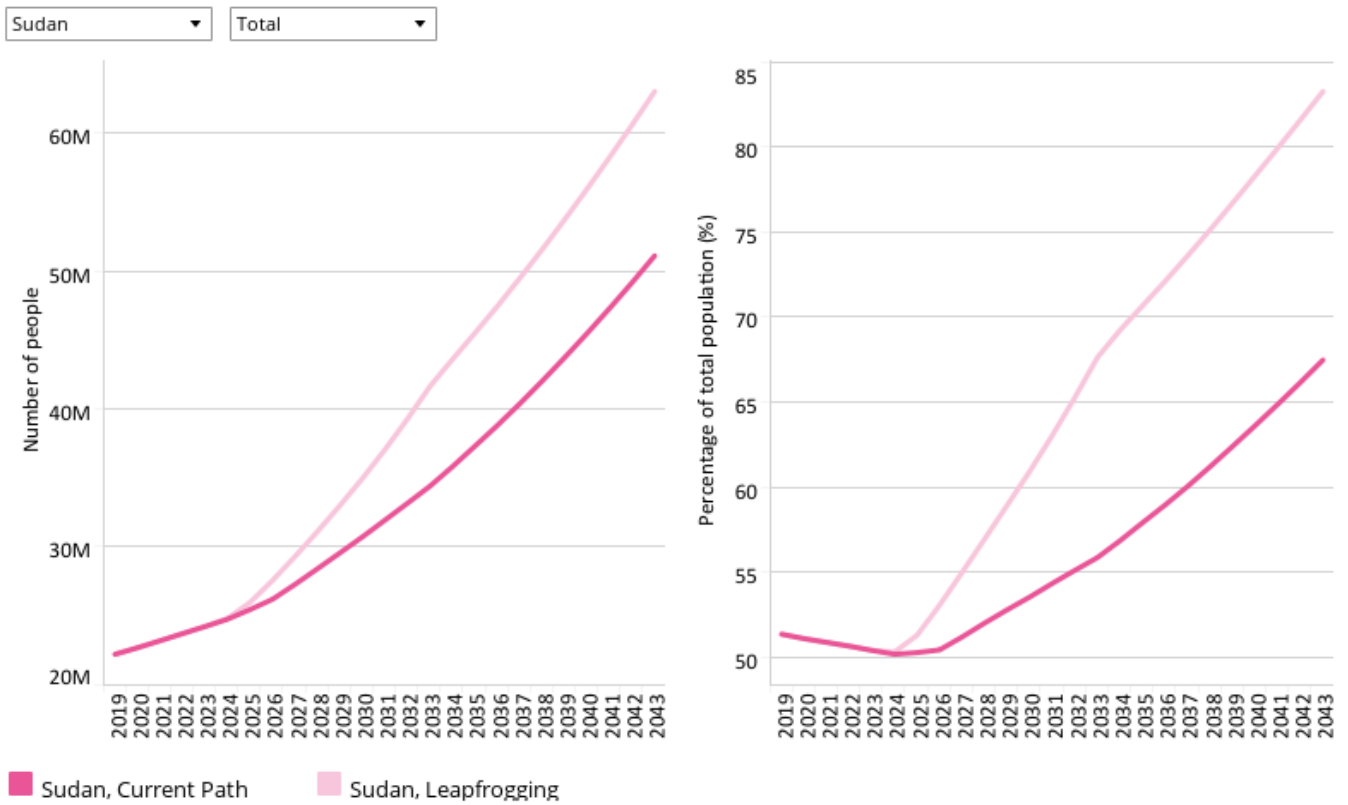
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Mobile broadband refers to wireless Internet access delivered through cellular towers to computers and other digital devices.

Mobile broadband subscriptions stood at 33.25 per 100 people in Sudan in 2019, above the average of 22.9 for low-income Africa. In the Leapfrogging scenario, mobile broadband subscriptions per 100 people in Sudan increase to 111.7 by 2043, slightly above the Current Path forecast of 111.2.



**Chart 36: Electricity access in CP and Leapfrogging scenario, 2019–2043**  
Millions of people and % of population



Source: IFs 7.63 initialising from World Development Indicators data

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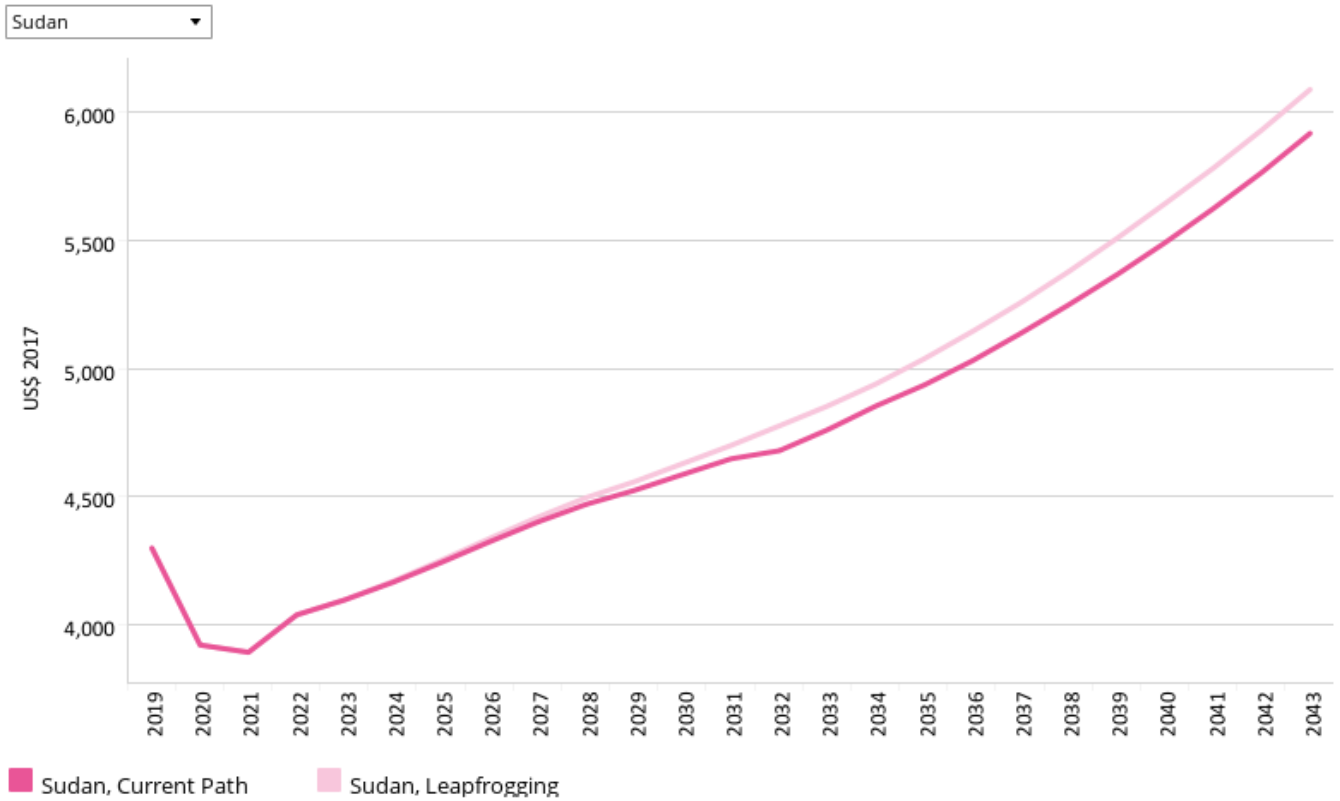
The Government of Sudan has invested extensively in the production and distribution of thermal and hydroelectric power over the past decade. Power generation capacity has doubled, rising from around 8 455 MW in 2011 to 17 064 MW in 2018.[15] (Sudan also imports electricity from Ethiopia.) Despite this growth, the power demand exceeds the available supply regularly, resulting in frequent power outages. In 2019, 51.3% of the population (22.2 million people) had access to electricity. This is above the average of 32.2% for low-income countries in Africa.

Also, access to electricity is skewed towards the urban areas. In 2019, about 71.4% of the urban population had access to electricity, compared to 41% in rural areas.

In the Leapfrogging scenario, 83.3% of the people in Sudan (63 million people) will have access to electricity by 2043. This is far above the projected average of 60.5% in the Current Path forecast for Africa low-income countries in the same year.

By 2043, 87.6% of the urban population will have access to electricity in the Leapfrogging scenario compared to 82.1% in the Current Path forecast. Regarding the population in the rural areas, 80.6% of them will have access to electricity by 2043 in the Leapfrogging scenario compared to only 58.6% in the Current Path forecast for the same year.

Chart 37: GDP per capita in CP and Leapfrogging scenario, 2019–2043  
Purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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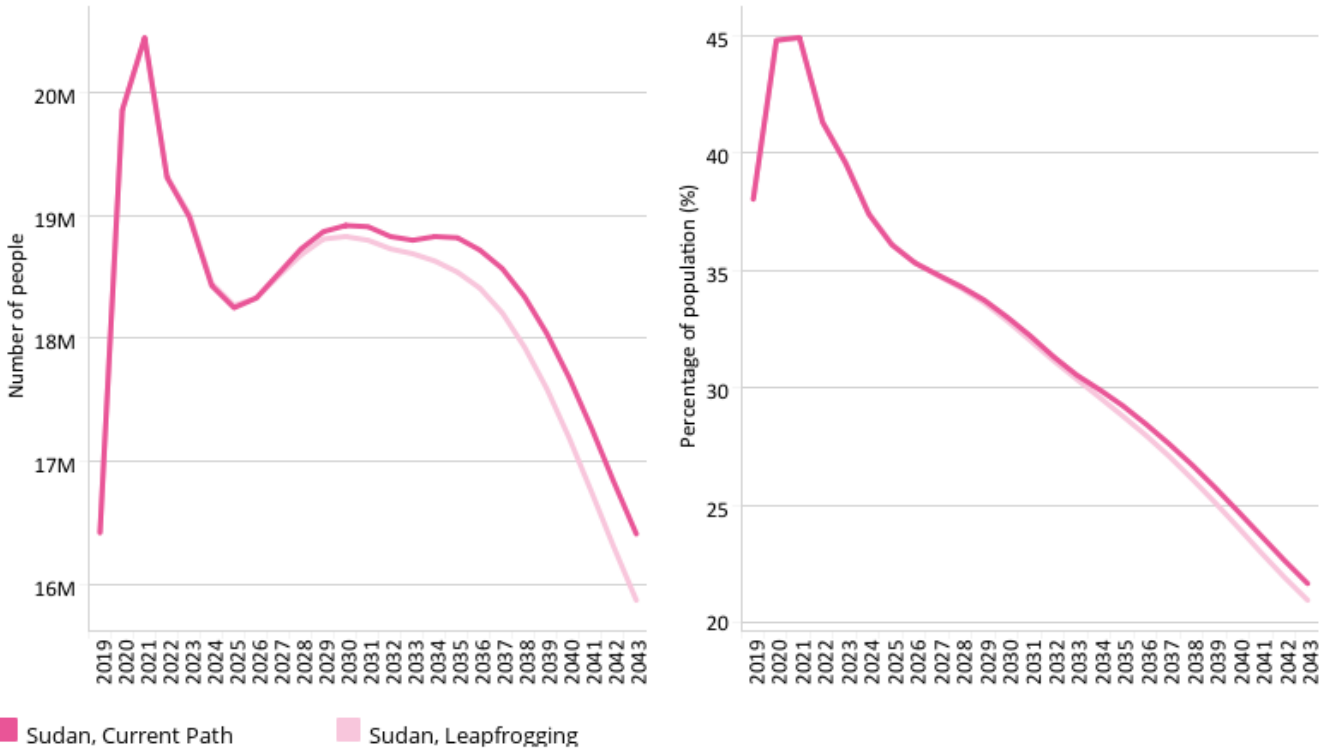
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By 2033, GDP per capita in the Leapfrogging scenario will be at US\$4 853, compared to US\$4 760 in the Current Path forecast, a difference of US\$93. In 2043, this difference will grow to US\$171. The GDP per capita in the Leapfrogging scenario is US\$2 303 lower than the projected average for low-income countries in Africa in 2043.

**Chart 38: Poverty in CP and Leapfrogging scenario, 2019–2043**  
Millions of people and % of total population



Sudan \$1.90



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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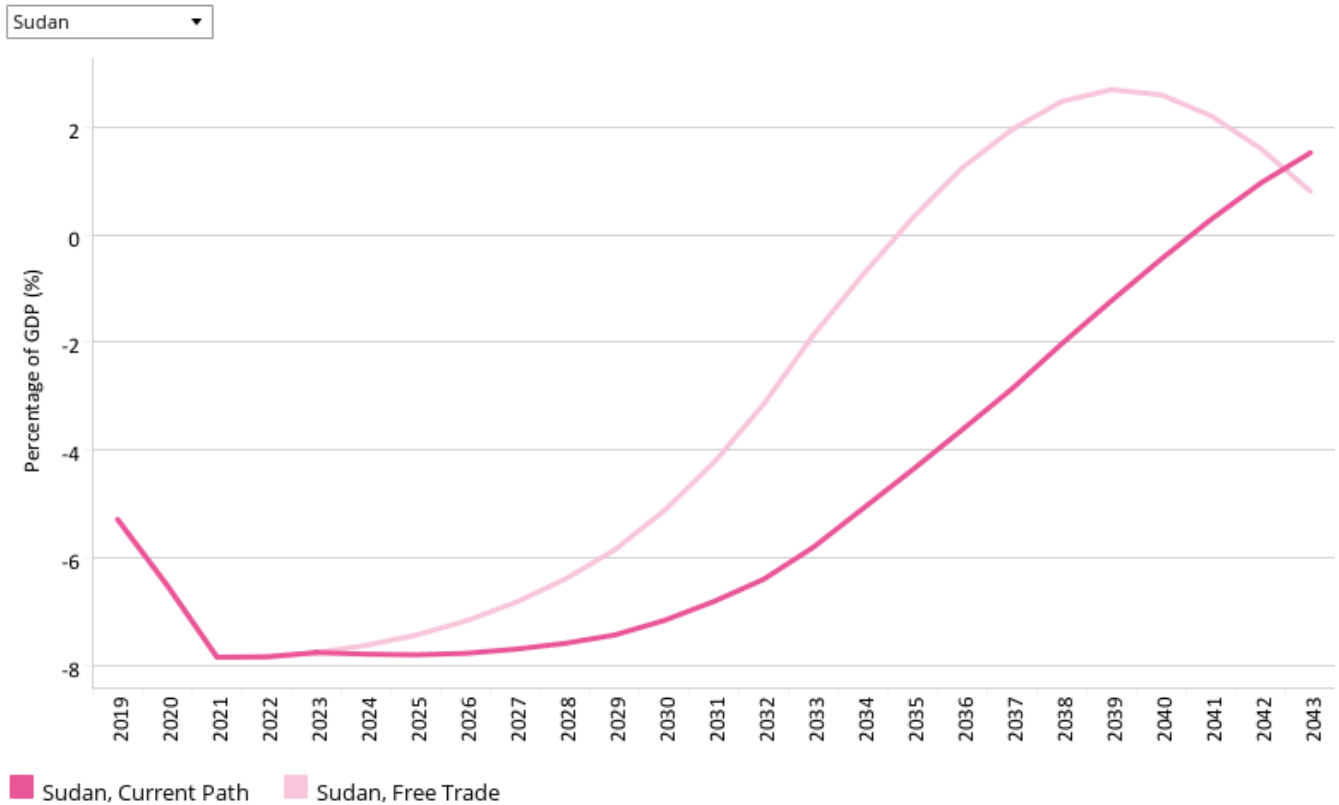
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In the Leapfrogging scenario, the number of poor people in 2043 is 15.87 million (21% of the population). This is roughly 540 000 fewer poor people than in the Current Path forecast for the same year. In the Leapfrogging scenario, the poverty rate is four percentage points higher than the average for Africa's low-income countries.



## Free Trade scenario

Chart 39: Trade balance in CP and Free Trade scenario, 2019–2043  
% of GDP



Source: IFs 7.63 initialising from World Development Indicators data

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The Free Trade scenario represents the impact of the full implementation of the African Continental Free Trade Area (AfCFTA) by 2034 through increases in exports, improved productivity and increased trade and economic freedom.

The intervention is explained [here](#) in the thematic part of the website.

The trade balance is the difference between the value of a country's exports and its imports. A country that imports more goods and services than it exports in terms of value has a trade deficit, while a country that exports more goods and services than it imports has a trade surplus.

The loss of oil reserves following South Sudan's secession eventually forced the Government of Sudan to boost non-oil exports to compensate for the loss of oil export revenue. As a result, exports in agriculture raw materials increased from 9% of total exports in 2011 to 57% in 2018.[16] Despite this improvement, government policies did not materialise in diversifying exports from agriculture, raw materials and natural resources to manufactured goods. Sudan mainly exports fuels, gold, oilseed, live animals and cotton, and imports capital goods and foodstuffs.

In 2019, the country's trade deficit amounted to nearly 5.3% of GDP. In the Free Trade scenario, Sudan's trade balance does improve: the country is forecast to record a trade surplus amounting to 0.32% of GDP by 2035, and 2.7% by 2038 before declining slowly to a surplus equivalent to 0.8% of GDP by 2043. In sum, over the period 2024 to 2042, Sudan's



# Chart 41: Poverty in CP and Free Trade scenario, 2019–2043

Millions of people and % of total population



Sudan \$1.90



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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Trade openness will reduce poverty in the long term after initially increasing it due to the redistributive effects of trade. Most African countries export primary commodities and low-tech manufacturing products, and therefore a continental free trade agreement (AfCFTA) that reduces tariffs and non-tariff barriers across Africa will increase competition among countries in primary commodities and low-tech manufacturing exports. Countries with inefficient, high-cost manufacturing sectors might be displaced as the AfCFTA is implemented, thereby pushing up poverty rates. In the long term, as the economy adjusts and produces and exports its comparatively advantaged (lower relative cost) goods and services, poverty rates will decline.

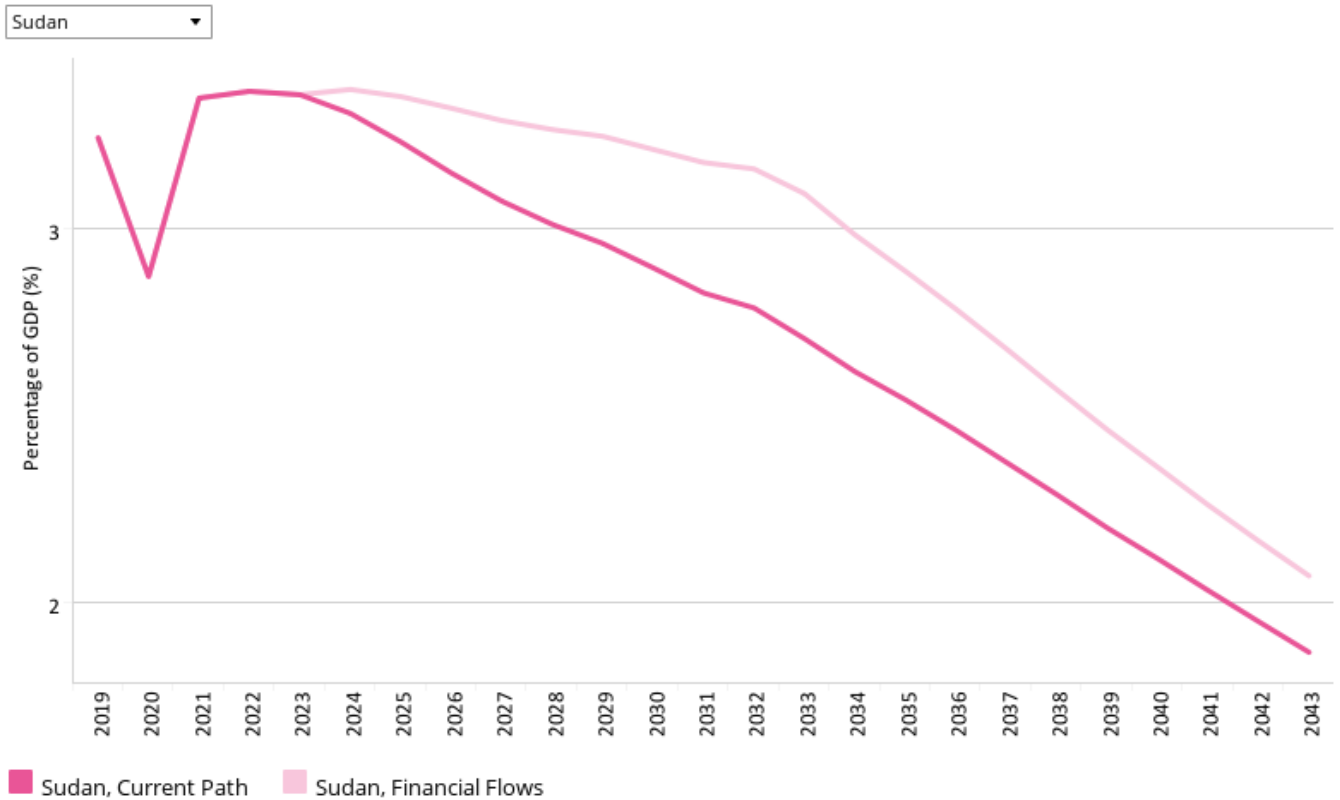
Between 2024 and 2033, the poverty rate at US\$1.90 in the Free Trade scenario is above the Current Path forecast. However, over the period 2034 to 2043, the poverty rate in the Free Trade scenario is below the Current Path forecast. The initial increase in poverty rates arises from the redistributive effect of trade openness associated with the implementation of the AfCFTA, and as firms and households adjust in the long term, poverty rates decline. The implementation of the AfCFTA will lead to creative destruction where the inefficient firms are kicked out of the markets (i.e. collapse) under intense competition. This will lead to job losses and poverty unless the government responds with a safety net programme. But in the long term, as the efficient firms grow with the trade opportunities, job opportunities increase, the unemployment rate declines and so does the poverty rate.

By 2043, the poverty rate in the Free Trade scenario is forecast to be 18.3% compared to 21.7% in the Current Path forecast. This is equivalent to 2.5 million fewer poor people than on the Current Path.



## Financial Flows scenario

### Chart 42: Foreign aid in CP and Financial Flows scenario, 2019–2043 % of GDP



Source: IFs 7.63 initialising from Development Assistance Committee of the OECD data, and World Bank and OECD GNI estimates.

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The Financial Flows scenario represents a reasonable but ambitious increase in worker remittances and aid flows to poor countries, and an increase in the stock of foreign direct investment (FDI) and additional portfolio investment inflows to middle-income countries. We also reduced outward financial flows to emulate a reduction in illicit financial outflows.

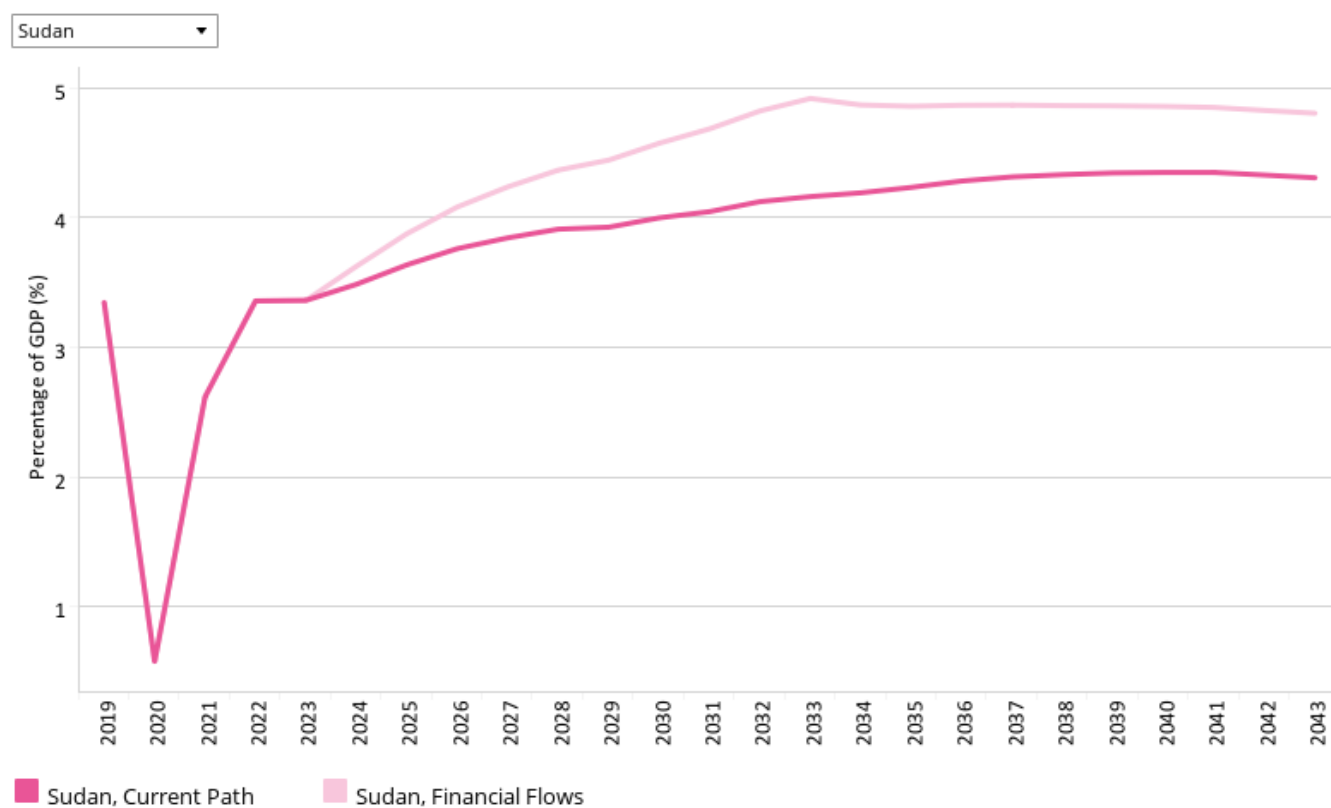
The intervention is explained [here](#) in the thematic part of the website.

Many countries in sub-Saharan Africa are still heavily reliant on foreign aid to provide basic services like education and health. This is the case for Sudan. Like most states in the Horn of Africa, Sudan relies heavily on aid from the Gulf countries. However, the removal of Sudan from the US State Sponsors of Terrorism list opens the door for additional aid.

Aid represented 3.2% of Sudan's GDP in 2019, which was below the average of 8.5% of GDP for low-income Africa. In the Financial Flows scenario, foreign aid flows to Sudan will account for 2.1% of GDP by 2043, above the Current Path forecast of 1.87% and below the average of 3.8% for low-income countries in Africa.



Chart 43: Inflow of FDI in CP and Financial Flows scenario, 2019–2043  
% of GDP



Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

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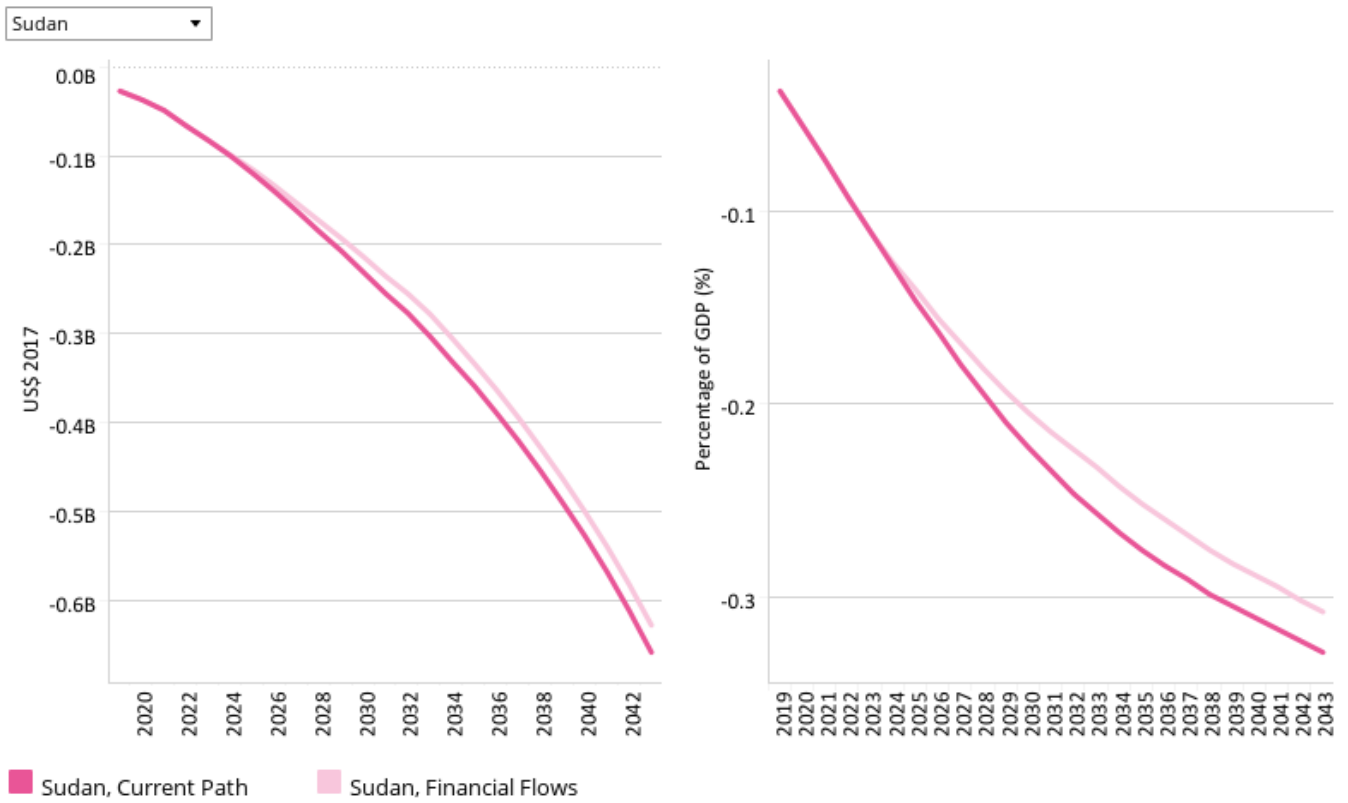
The poor business climate, recurrent political instability and conflicts deter foreign investment inflows into Sudan. In the 2020 Doing Business report by the World Bank, Sudan ranked 171 out of 190 countries.[17]

Like most countries in the Horn of Africa, Sudan relies heavily on investment from the Gulf countries. Ethiopia and Sudan are the main destinations of Arab countries' investments in the Horn of Africa. For instance, these two countries accounted for about 95% of total investment by the Gulf states (Saudi Arabia, the UAE, Kuwait and Qatar) in the Horn between 2000 and 2017.[18]

In 2019, FDI inflows represented 3.3% of the country's GDP before declining to 0.58% in 2020 due to the multiple shocks associated with the COVID-19 pandemic. In the Financial Flows scenario, FDI inflows in 2043 will represent about 4.8% of GDP compared to 4.31% on the Current Path.

FDI can act as a catalyst for economic growth and development as it brings much-needed capital and technology to recipient countries. The authorities in Sudan should improve stability and make the necessary reforms to attract more FDI, especially manufacturing FDI.

**Chart 44: Remittances in CP and Financial Flows scenario, 2019–2043**  
 Billions US\$ 2017 and % of GDP



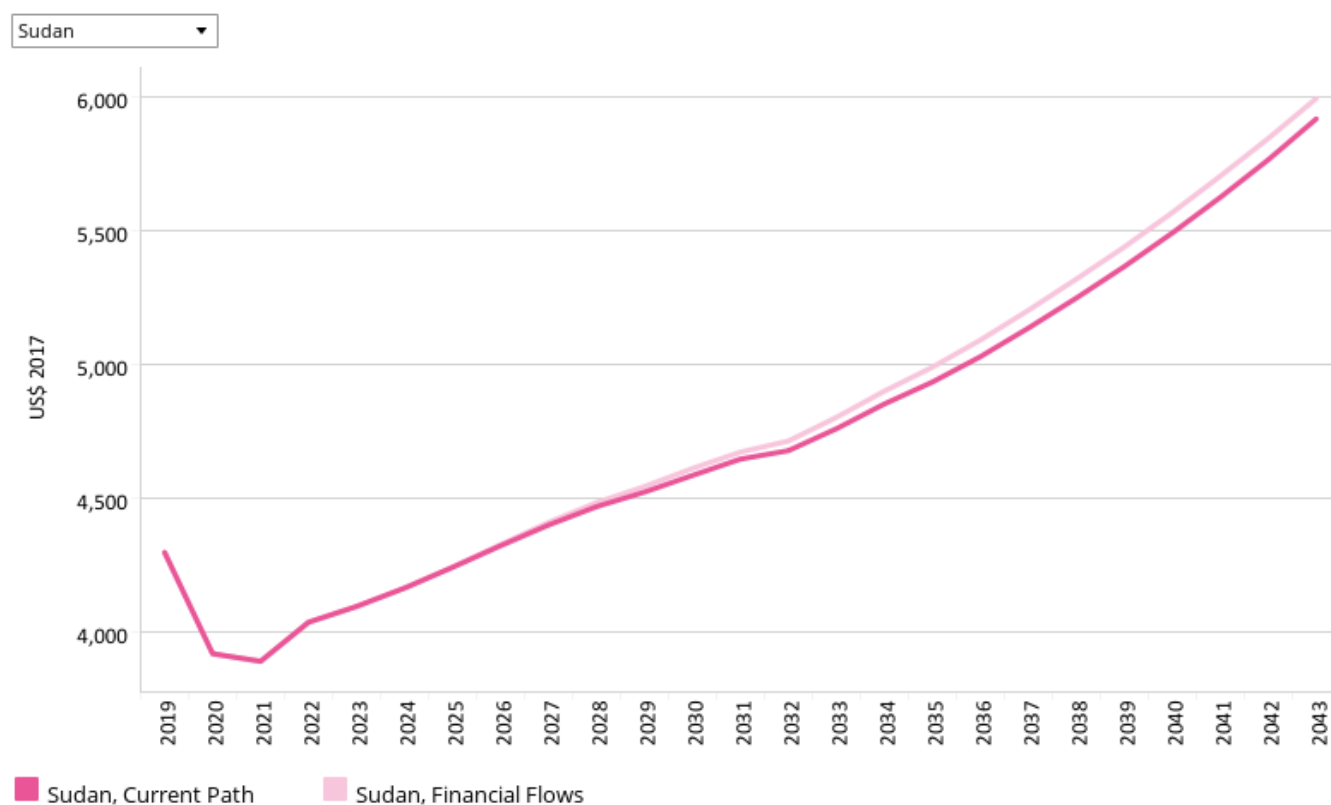
Source: IFs 7.63 initialising from World Development Indicators data

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Sudan is a net sender of remittances according to estimates in IFs. In 2019, remittances sent amounted to 0.04% of GDP. On the Current Path, by 2043, the country will send about seven times as much money abroad: US\$0.7 billion, representing 0.33% of GDP. In the Financial Flows scenario, however, Sudan would be sending US\$0.6 billion abroad, accounting for 0.31% of GDP.

Chart 45: GDP per capita in CP and Financial Flows scenario, 2019–2043  
Purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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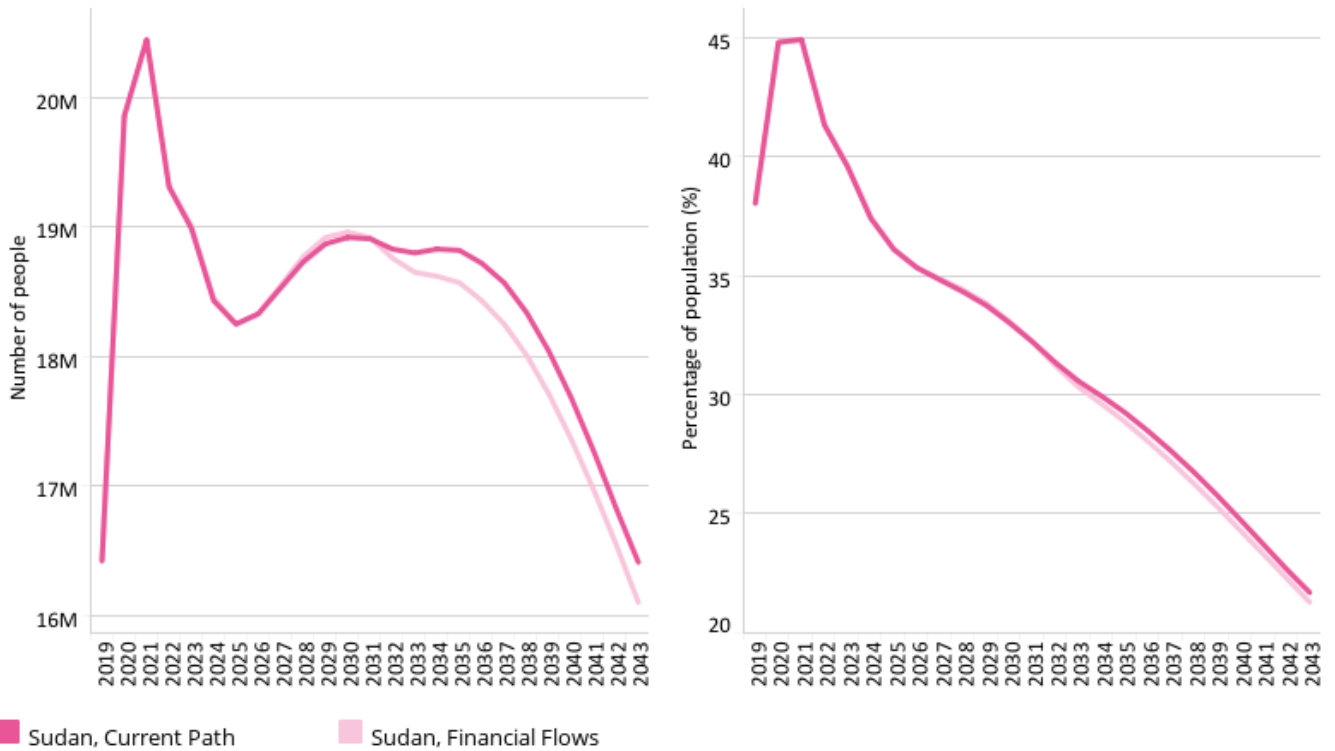
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In the Financial Flows scenario, the GDP per capita of Sudan increases from US\$4 298 in 2019 to US\$5 994 in 2043, which is US\$76 higher than in the Current Path forecast for the same year. Overall, the Financial Flows scenario has a modest impact on GDP per capita in Sudan. FDI, for instance, can boost growth and development but it is not straightforward. Studies have shown that the impact of FDI on economic growth is conditional on the recipient countries' absorptive capacities (domestic conditions) such as the level of human capital, infrastructure development, financial development and institutional development, among others.[19] Sudanese authorities should not only implement policies to attract FDI but they should also improve the domestic conditions to harness the growth enhancing effect of FDI, and other external financial flows.

**Chart 46: Poverty in CP and Financial Flows scenario, 2019–2043**  
Millions of people and % of total population



Sudan \$1.90



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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The Financial Flows scenario reduces the number of extremely poor people in Sudan by only 310 000 by 2043, compared to the Current Path forecast, using the US\$1.90 poverty threshold. One of the plausible explanations of this minor impact of external financial flows on poverty is that FDI to Sudan is generally concentrated in the extractive industry, which does not have strong forward and backward linkages with other sectors of the economy. As a result, it does not substantially impact job creation and employment. Whereas 38% of Sudan's population lived in extreme poverty in 2019, by 2043, it would be 21.3% in the Financial Flows scenario, compared to 21.7% in the Current Path forecast.



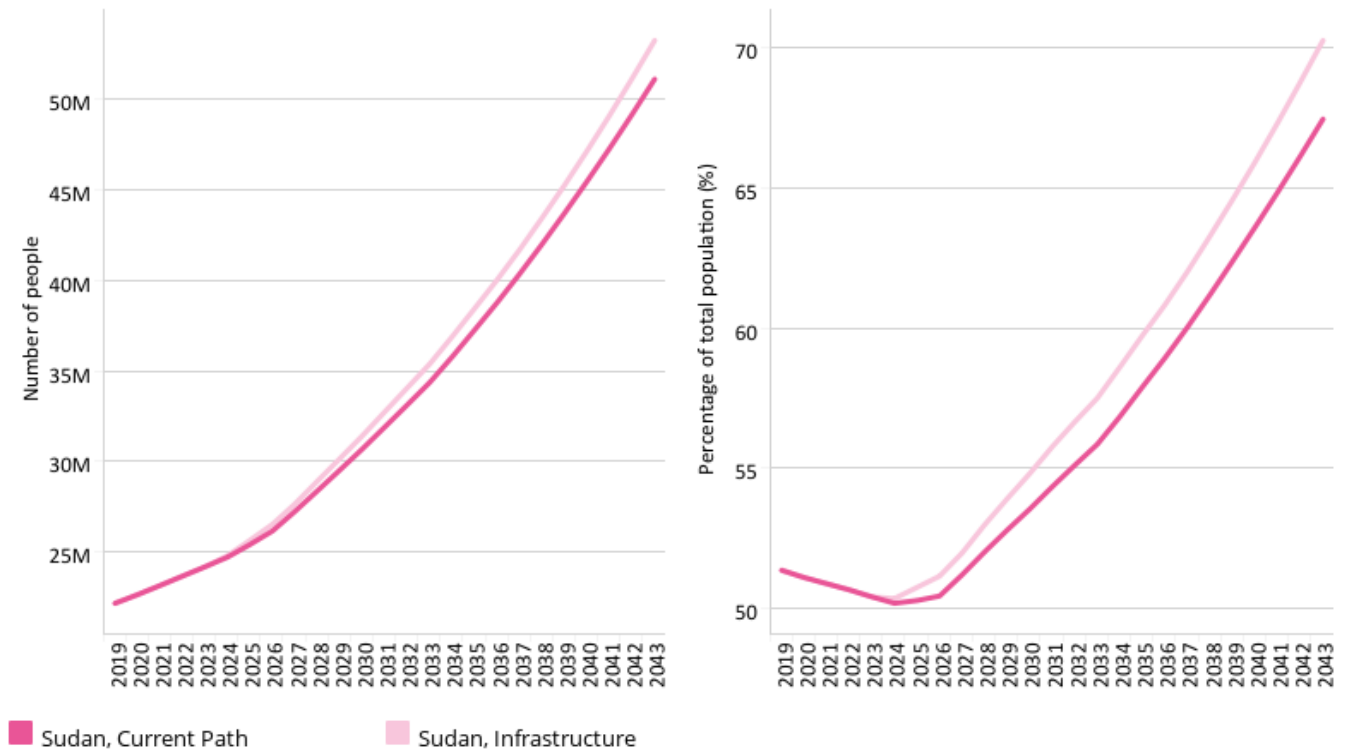
## Infrastructure scenario

### Chart 47: Electricity access in CP and Infrastructure scenario, 2019–2043

Millions of people and % of population



Sudan Total



Source: IFs 7.63 initialising from World Development Indicators data

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The Infrastructure scenario represents a reasonable but ambitious increase in infrastructure spending across Africa, focusing on basic infrastructure (roads, water, sanitation, electricity access and ICT) in low-income countries and increasing emphasis on advanced infrastructure (such as ports, airports, railway and electricity generation) in higher-income countries.

Note that health and sanitation infrastructure is included as part of the Health/WaSH scenario and that ICT infrastructure and more rapid uptake of renewables are part of the Leapfrogging scenario. The interventions there push directly on outcomes, whereas those modelled in this scenario increase infrastructure spending, indirectly boosting other forms of infrastructure, including those supporting health, sanitation and ICT.

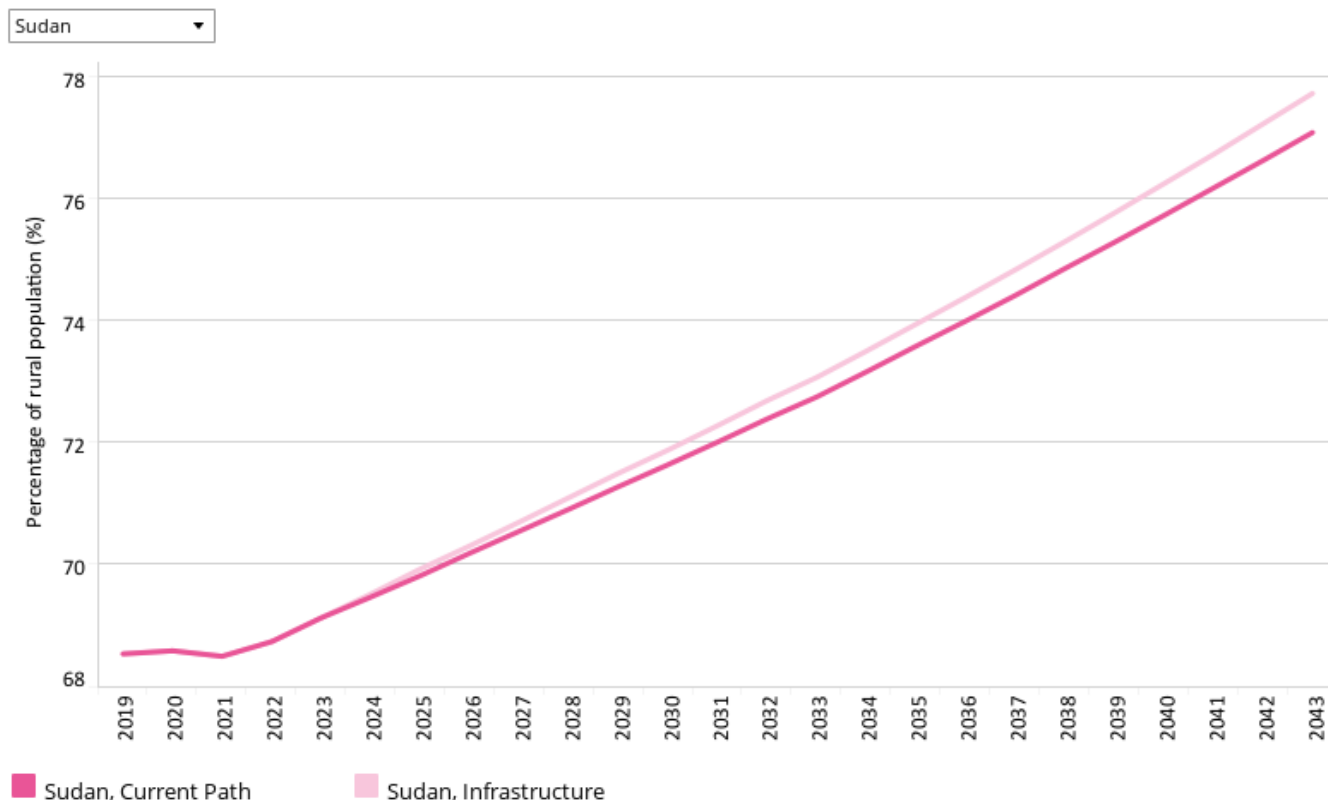
The intervention is explained [here](#) in the thematic part of the website.

In 2019, the total number of people with access to electricity in Sudan was about 22.2 million (51.3% of the population). The Infrastructure scenario increases it to 53.2 million (70.3% of the population) by 2043. This is above the projected number of 51.1 million people (67.5% of the population) in the Current Path forecast.

In the scenario, by 2043 it is projected that 84.4% of the urban population in Sudan will have access to electricity compared to 82.1% in the Current Path forecast. In the Infrastructure scenario and in the Current Path forecast, respectively, 61.7%

(29 million people) and 58.3% (27.6 million people) of the rural population will have access to electricity in 2043, indicating the disparity in access to electricity between the urban and rural populations in Sudan.

**Chart 48: Rural road access in CP and Infrastructure scenario, 2019–2043**  
 % of rural population within 2 km of an all-weather road



Source: IFs 7.63 initialising from World Bank Rural Access Index data

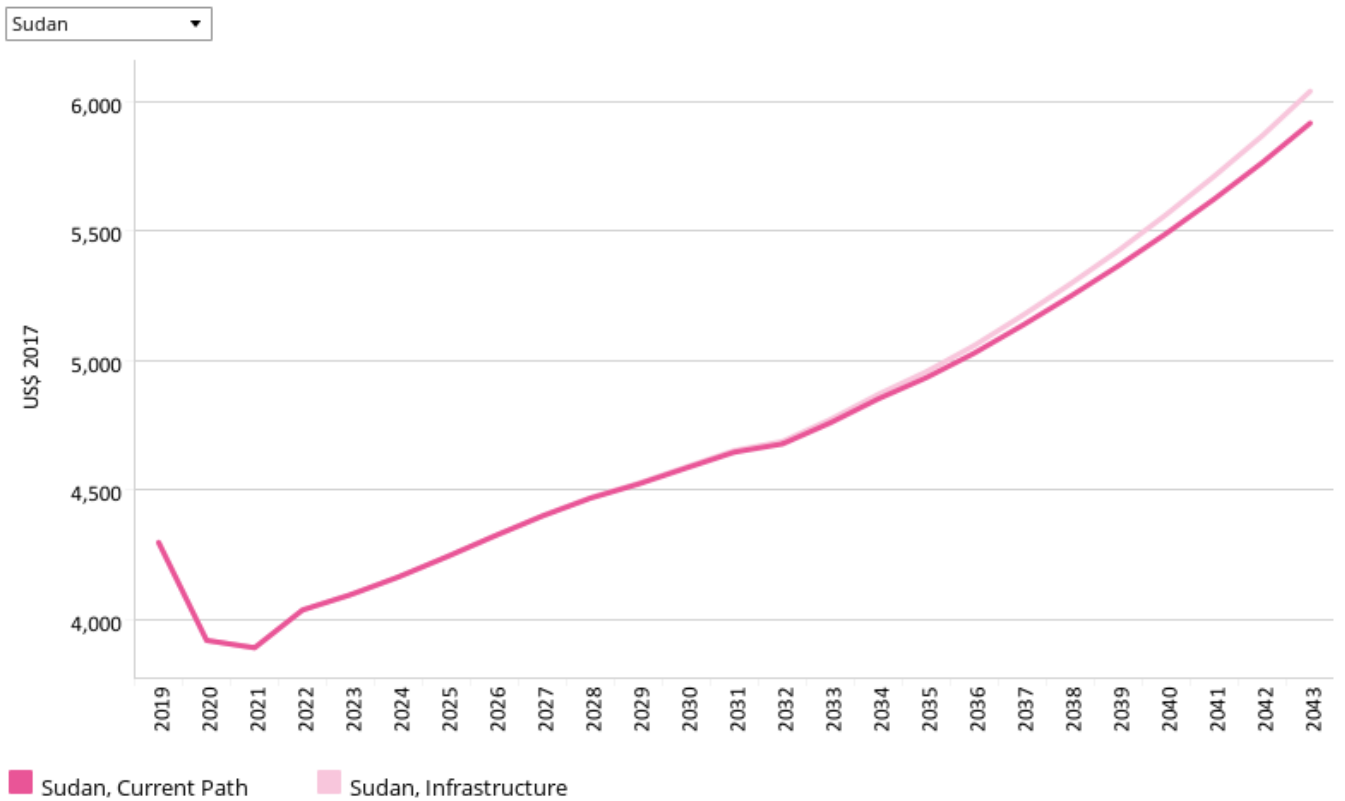
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Indicator 9.1.1 in the Sustainable Development Goals refers to the proportion of the rural population who live within 2 km of an all-season road and is captured in the Rural Access Index.

Accessibility to rural areas spurs on socio-economic development and improves the rural population's living standards. Better rural road infrastructure facilitates trade between rural and urban areas. For instance, it enables the rural population to enjoy products from nearby urban areas while allowing the urban population to more easily access agricultural products supplied by those in rural areas.

In 2019, 68.5% of the rural population in Sudan resided within 2 km from an all-weather road, above the average of 43% for low-income African countries. In the Infrastructure scenario, it is projected to increase to 77.7% by 2043, slightly above the 77.1% projected in the Current Path forecast for that year.

Chart 49: GDP per capita in CP and Infrastructure scenario, 2019–2043  
Purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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Quality infrastructure enables business and industry development and increases efficiency in the delivery of social services. Critical basic infrastructure such as roads and electricity play a vital role in achieving sustainable and inclusive economic growth. Infrastructure shortages impede higher productivity and growth.

Sudan's GDP per capita is forecast to rise to US\$6 041 by 2043 in the Infrastructure scenario. This is US\$123 more than the Current Path forecast for the same year.



**Chart 50: Poverty in CP and Infrastructure scenario, 2019–2043**  
Millions of people and % of total population



Sudan \$1.90



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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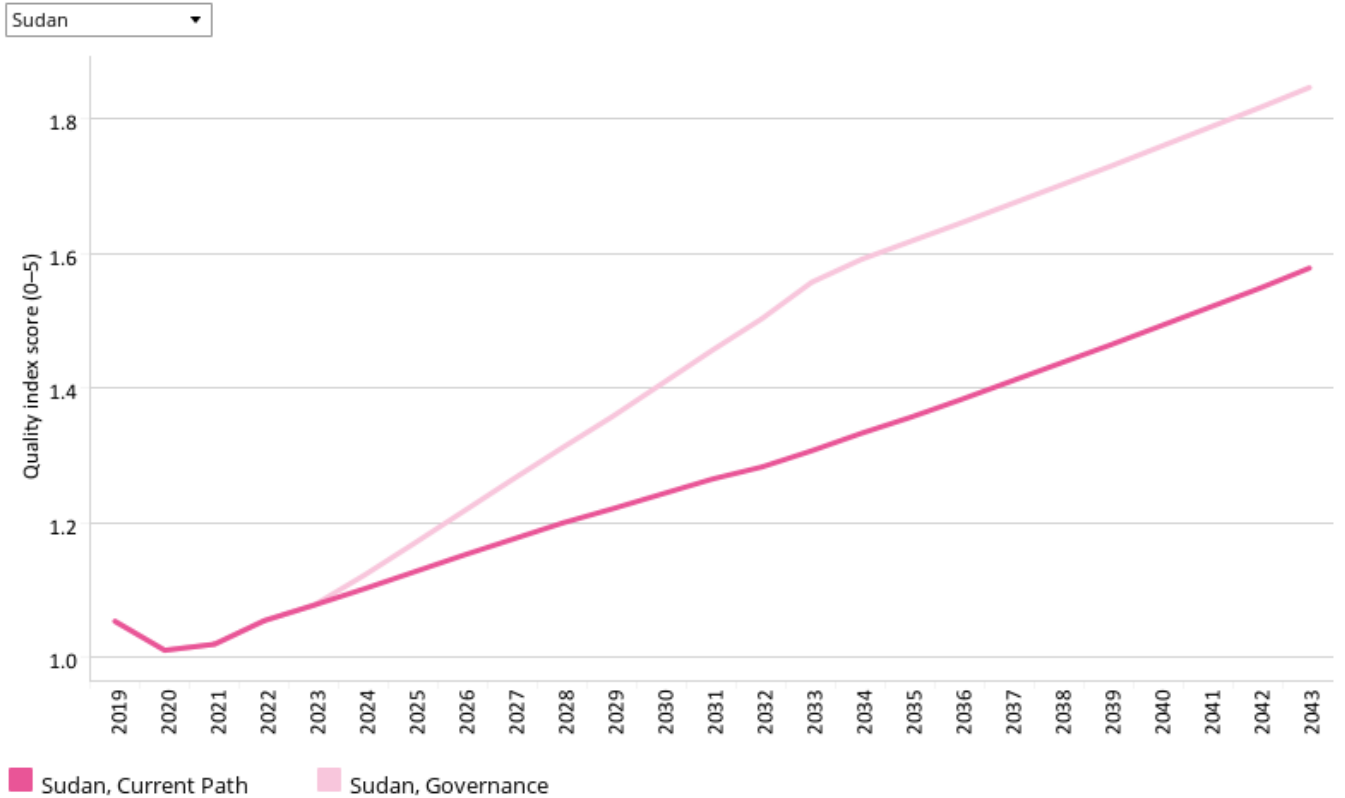
Between 2024 and 2040, the poverty rate and the number of poor people in the Infrastructure scenario are above the Current Path forecast. Heavy investment in infrastructure may lead to a consumption crunch in the short time as it is costly. However, the population is better off in the long term as infrastructure development improves the business environment, job creation and income.

In the Infrastructure scenario, the absolute number of poor people is projected to decline from 19 million in 2035 to 16.31 million (21.5% of the population) in 2043. This is equivalent to 100 000 fewer poor people in 2043, compared to the Current Path forecast.



## Governance scenario

Chart 51: Gov effectiveness in CP and Governance scenario, 2019–2043  
World Bank quality index score for government effectiveness



Source: IFs 7.63 initialising from Kaufmann, Kraay and Mastruzzi (2010) data

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The Governance scenario represents a reasonable but ambitious improvement in accountability and reduces corruption, and hence improves the quality of service delivery by government.

The intervention is explained [here](#) in the thematic part of the website.

As defined by the World Bank, government effectiveness ‘captures perceptions of the quality of public services, the quality of the civil service and the degree of its independence from political pressures, the quality of policy formulation and implementation, and the credibility of the government’s commitment to such policies’.

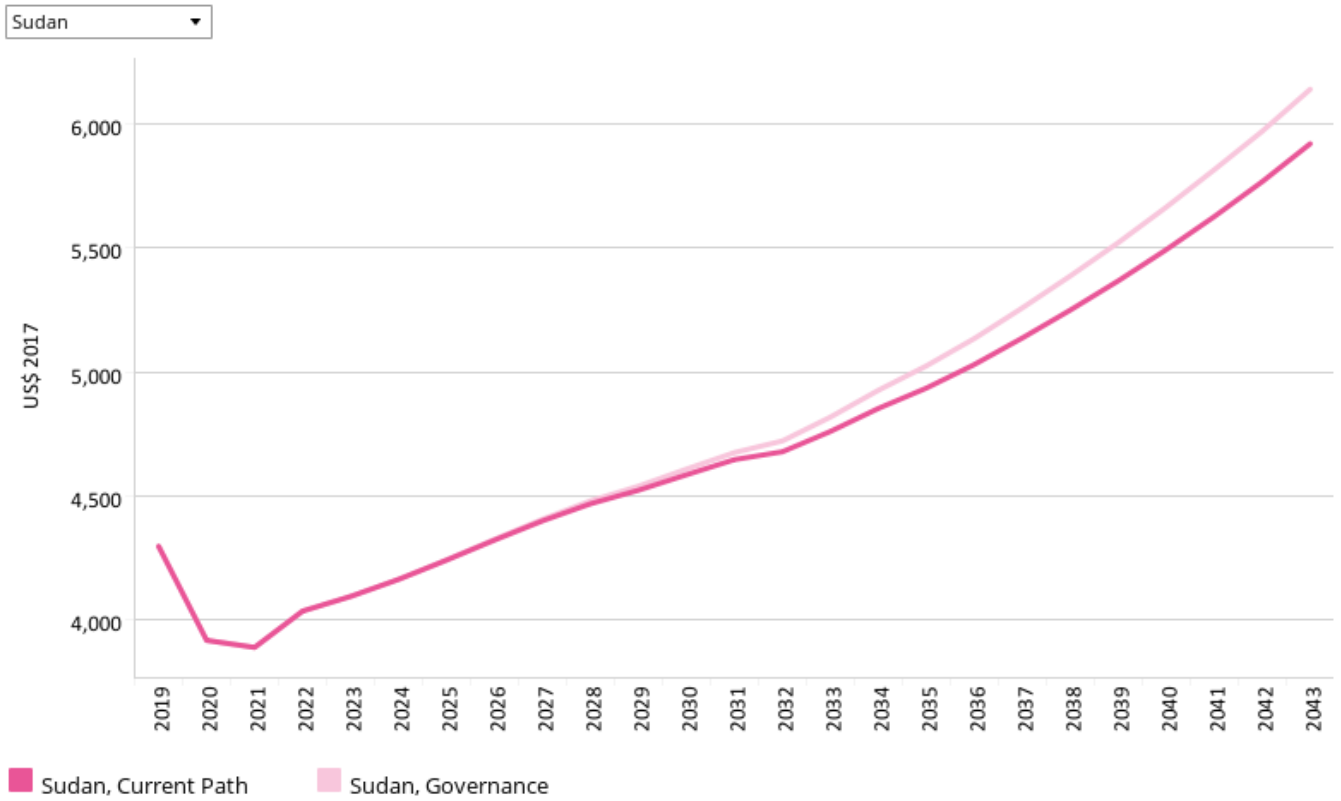
Chart 51 presents the impact of the interventions in the Governance scenario on government effectiveness.

Weak government effectiveness and the absence of strong institutional and legal mechanisms to ensure accountability hamper economic progress in Sudan. Corruption exists in every sector of the economy and in every level of the Sudanese government. According to the Sudan Democracy First Group, petty corruption is pervasive for citizens seeking government services.[20]

In 2019, the government effectiveness index score for Sudan was 1.05 (out of a maximum of 5). In the Current Path forecast and in the Governance scenario, the score for the country is projected to increase. The projected score for

government effectiveness in the Governance scenario by 2043 is 1.85. This is 0.27 points higher than the projected score of 1.58 in the Current Path forecast for the same year. However, Sudan will still have a lower government effectiveness score than the Current Path forecast average of 1.9 for Africa low-income countries by 2043.

**Chart 52: GDP per capita in CP and Governance scenario, 2019–2043**  
Purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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In the Governance scenario, Sudan's GDP per capita is projected to increase to US\$6 137 in 2043, which is US\$219 more than the Current Path forecast for the same year. The GDP per capita of US\$6 137 in the scenario in 2043 is above the Current Path forecast average of US\$3 790 for low-income countries in Africa for the same year.

Critical determinants of growth depend on governance and the institutional settings in a country. The governing elite in Sudan should set aside their selfish personal benefit to focus on the selfless common good.

**Chart 53: Poverty in CP and Governance scenario, 2019–2043**  
Millions of people and % of total population



Sudan \$1.90



Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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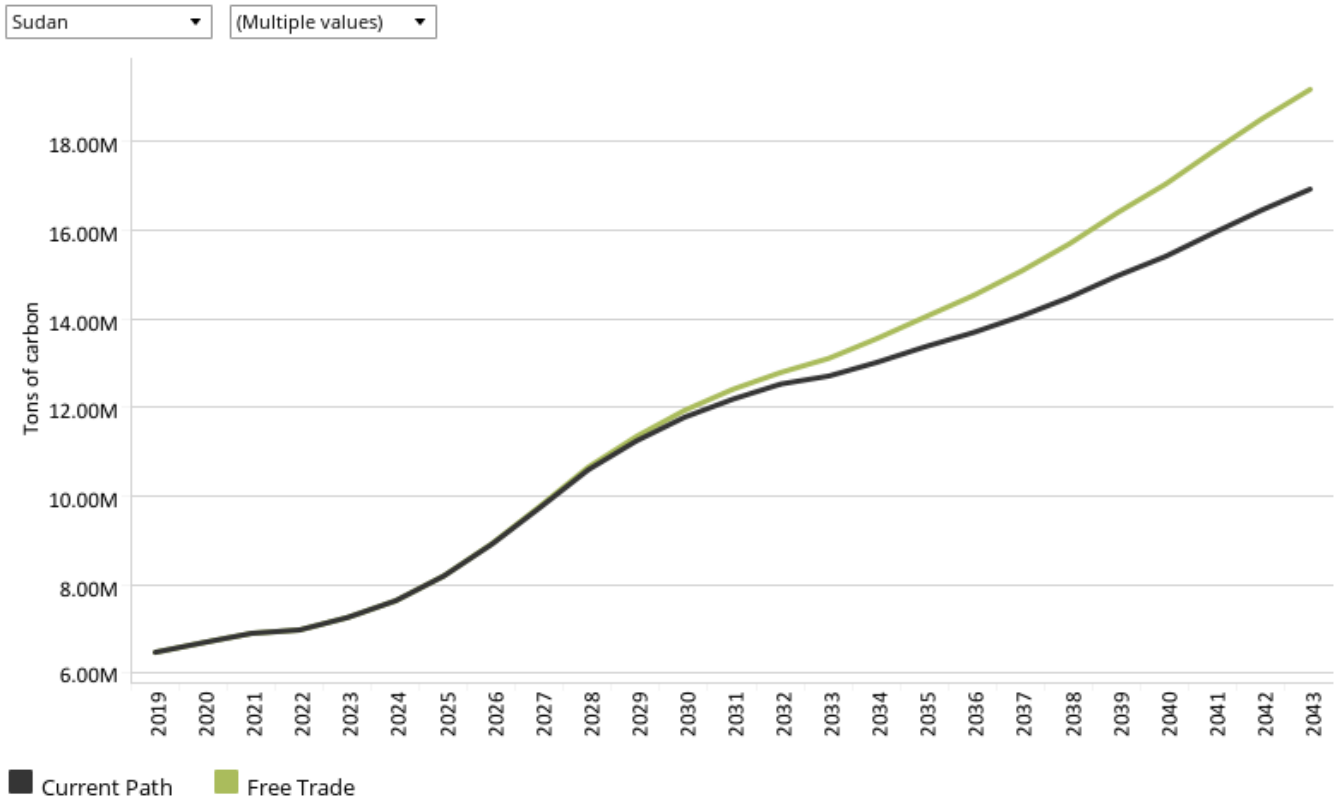
Using the US\$1.90 poverty threshold for low-income countries, the poverty rate in Sudan is projected to decline to 20.6% in 2043 in the Governance scenario, which is above the average of 25.1% for low-income countries in Africa. The poverty rate of 20.6% in the Governance scenario in 2043, equates to roughly 840 000 fewer poor people than in the Current Path forecast by 2043.



## Impact of scenarios on carbon emissions

### Chart 54: Carbon emissions in CP and scenarios, 2019–2043

Million tons of carbon (note, not CO<sub>2</sub> equivalent)



Source: IFs 7.63 initialising from Carbon Dioxide Information Analysis Center data

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This section presents projections for carbon emissions in the Current Path for Sudan and the 11 scenarios. Note that IFs uses carbon equivalents rather than CO<sub>2</sub> equivalents.

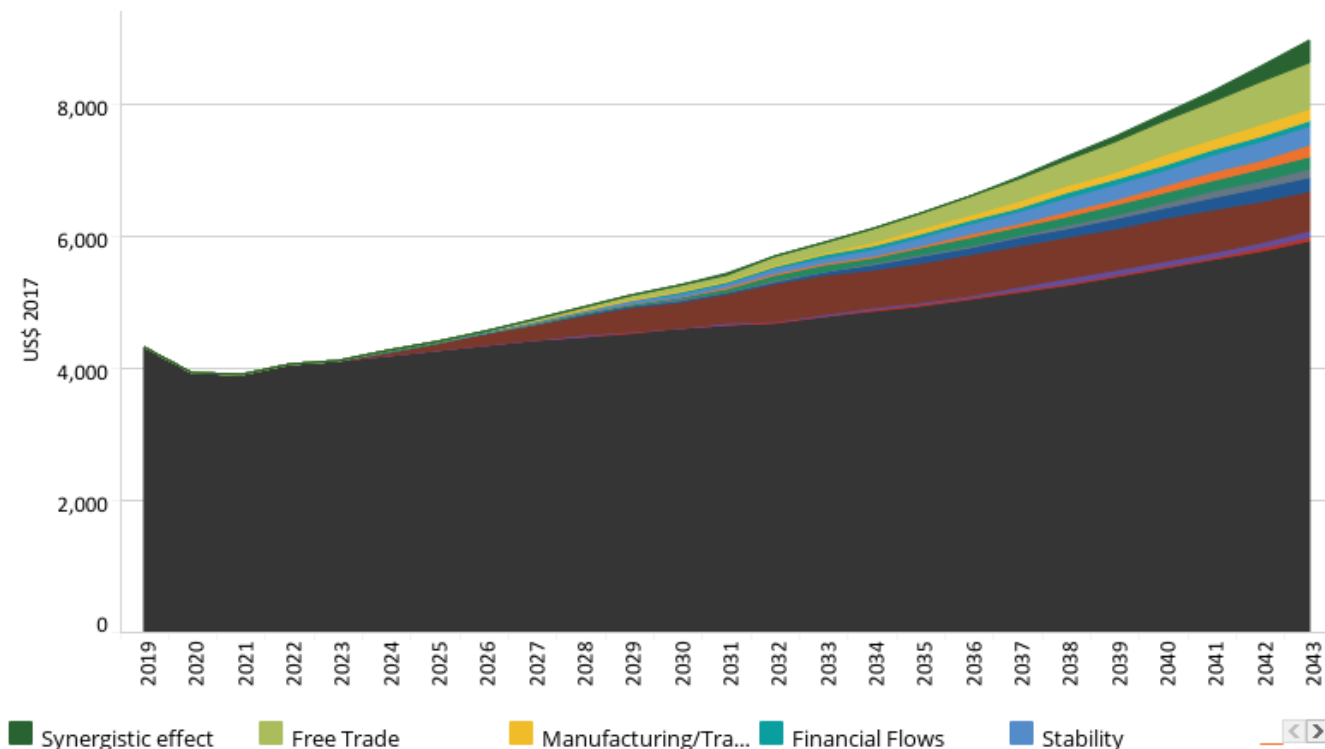
In 2019, Sudan released about 6.5 million tons of carbon, and in the Current Path forecast will release 16.9 million tons by 2043 — an increase of 160%. Like many developing countries, the country will disproportionately suffer from climate change, which it has contributed very little to. Nonetheless, the country must reduce its carbon emissions and move towards renewable energy for sustainable growth to mitigate climate change.

The Free Trade and Agriculture scenarios have the most significant impact on carbon emissions in Sudan. The Demographic scenario has the lowest level of carbon emissions. The reduction in population growth curtails population pressure on the utilisation of resources and hence minimises environmental degradation. Except for the Leapfrogging scenario, the quantity of carbon emissions in all the scenarios is higher than the Current Path forecast in 2043. By 2043, the carbon emissions range from 14.6 million tons in the Leapfrogging scenario to 19.2 million tons of carbon in the Demographic scenario

**Chart 55: GDP per capita in CP and scenarios, 2019–2043**  
 Additional GDP per capita per scenario, purchasing power parity



Sudan



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

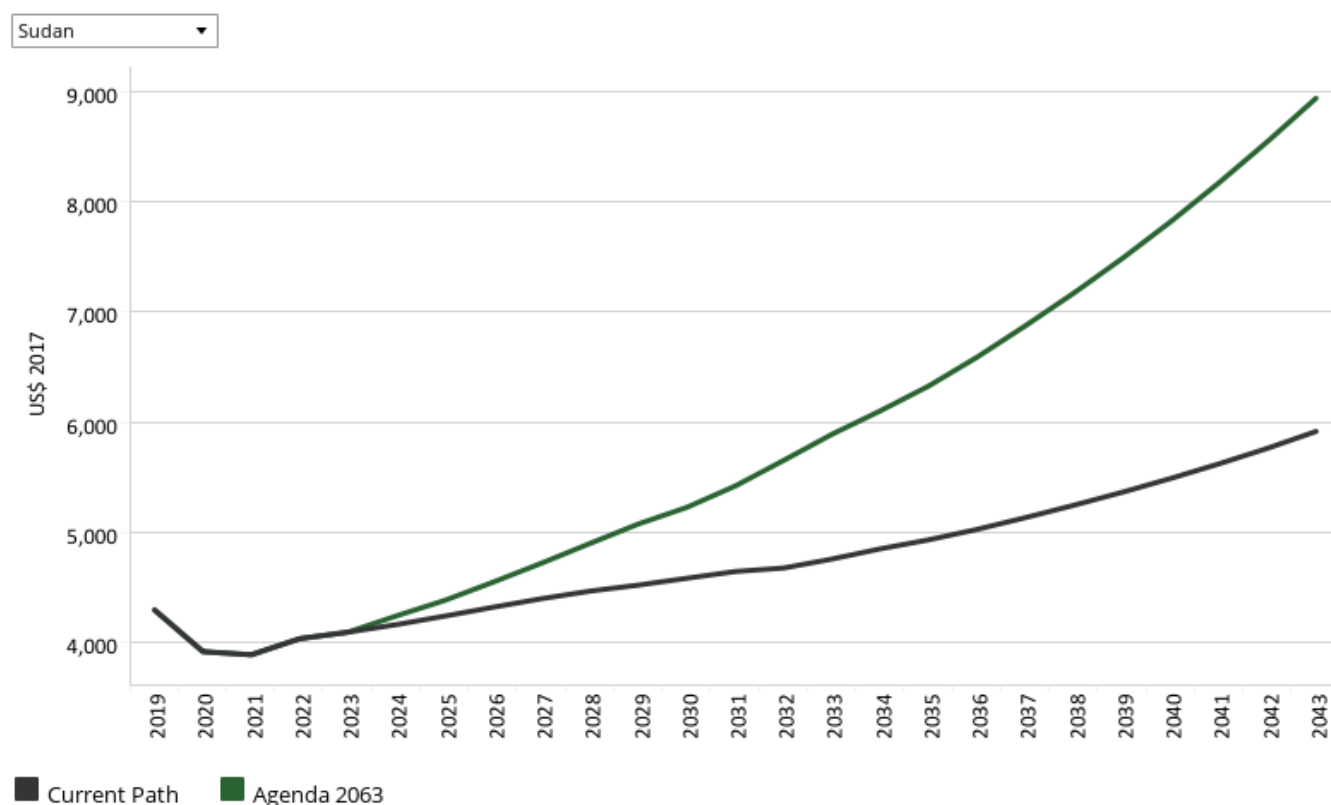
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The Combined Agenda 2063 scenario consists of the combination of all 11 sectoral scenarios presented above, namely the Stability, Demographic, Health/WaSH, Agriculture, Education, Manufacturing/Transfers, Leapfrogging, Free Trade, Financial Flows, Infrastructure and Governance scenarios. The cumulative impact of better education, health, infrastructure, etc. means that countries get an additional benefit in the integrated IFs forecasting platform that we refer to as the synergistic effect. Chart 55 presents the contribution of each of these 12 components to GDP per capita in the Combined Agenda 2063 scenario as a stacked area graph.

The synergistic effect of all the scenarios on GDP per capita is US\$330.27 in 2043. The scenario with the most significant impact on GDP per capita by 2043 is the Free Trade scenario followed by the Agriculture scenario. The Health/WaSH scenario has the least impact on GDP per capita. These findings suggest that agriculture development and trade liberalisation are some of the viable options to enhance human and economic development in Sudan.

**Chart 56: GDP per capita in CP and Combined scenario, 2019–2043**  
Purchasing power parity



Source: IFs 7.63 initialising from UN Population Division World Population Prospects and World Development Indicators data

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Whereas Chart 55 presents a stacked area graph on the contribution of each scenario to GDP per capita as well as the additional benefit or synergistic effect, Chart 56 presents only the GDP per capita in the Current Path forecast and the Combined Agenda 2063 scenario.

In the Combined Agenda scenario, the Government of Sudan makes a concerted effort to remove the binding constraints on growth and inclusive development. The Combined Agenda 2063 scenario has a much greater impact on GDP per capita compared to the individual thematic scenarios. By 2033, the GDP per capita of Sudan in the Combined Agenda 2063 scenario is US\$1 133 larger than in the Current Path forecast, and by 2043 it would come to US\$8941, US\$3 023 more than in the Current Path forecast for that year.

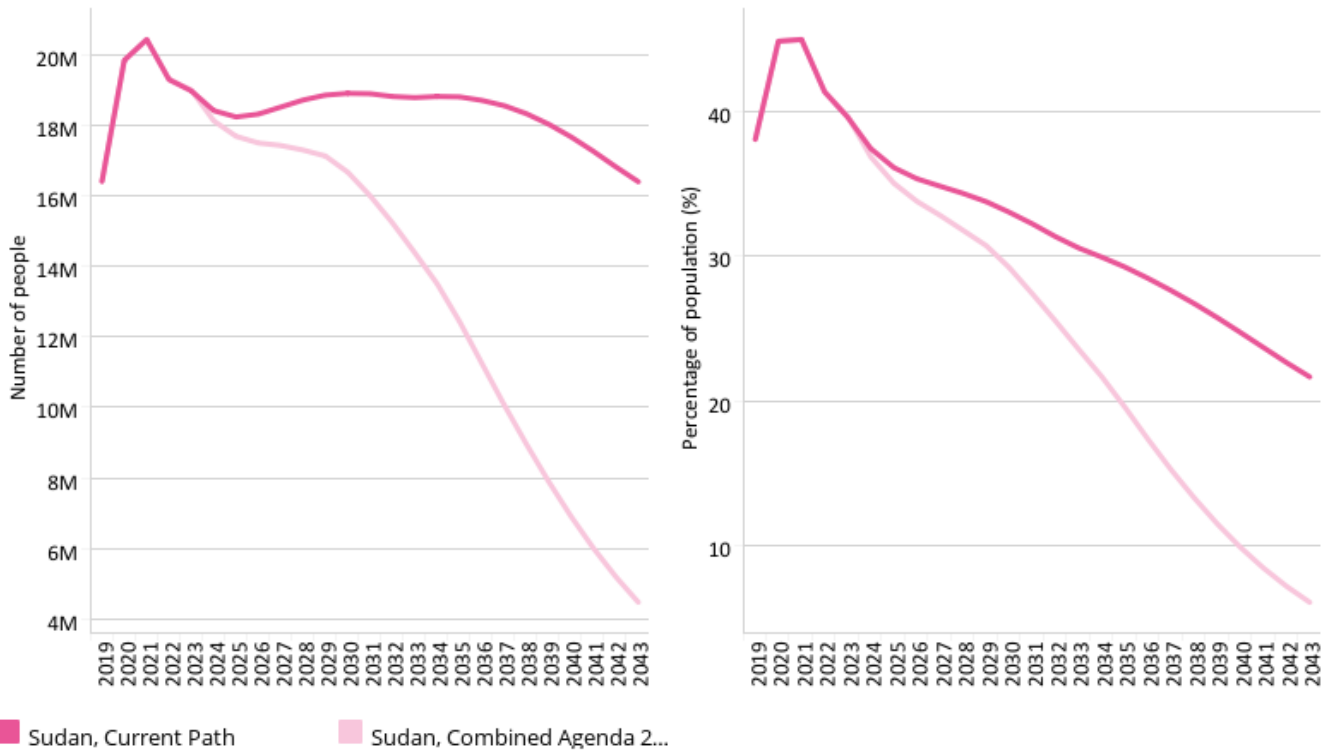
The Combined Agenda 2063 scenario shows that a policy push across all the development sectors is necessary to achieve sustained growth and development in Sudan.



**Chart 57: Poverty in CP and Combined scenario, 2019–2043**  
Millions of people and % of total population



Sudan \$1.90



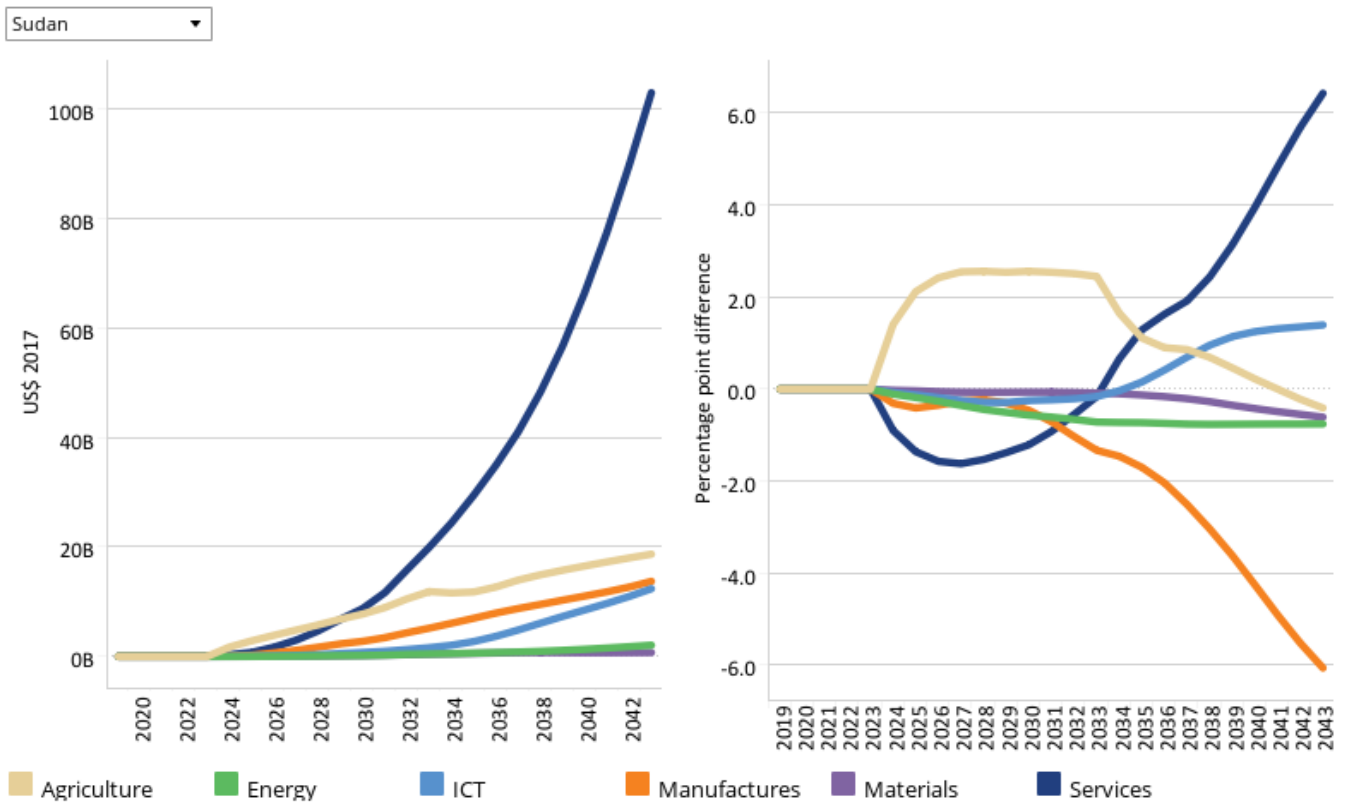
Source: IFs 7.63 initialising from UN Population Division Population Prospects estimate, World Development Indicators population data and PovcalNet World Bank data

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In the Combined Agenda 2063 scenario, by 2033, 23.6% of Sudan's population will be living in extreme poverty compared to 30.6% in the Current Path forecast. This represents about 4.4 million fewer poor people than the Current Path forecast. By 2043, the extreme poverty rate declines to 6.1% (4.5 million people) compared to 21.7% (16.4 million people) in the Current Path forecast, a reduction of 15.6 percentage points, or 11.96 million people. The Combined Agenda 2063 scenario shows that a concerted policy push across all the development sectors could significantly reduce poverty in Sudan.

**Chart 58: Value added by sector in CP and Combined scenario, 2019–2043**  
 Absolute and % point difference GDP



Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

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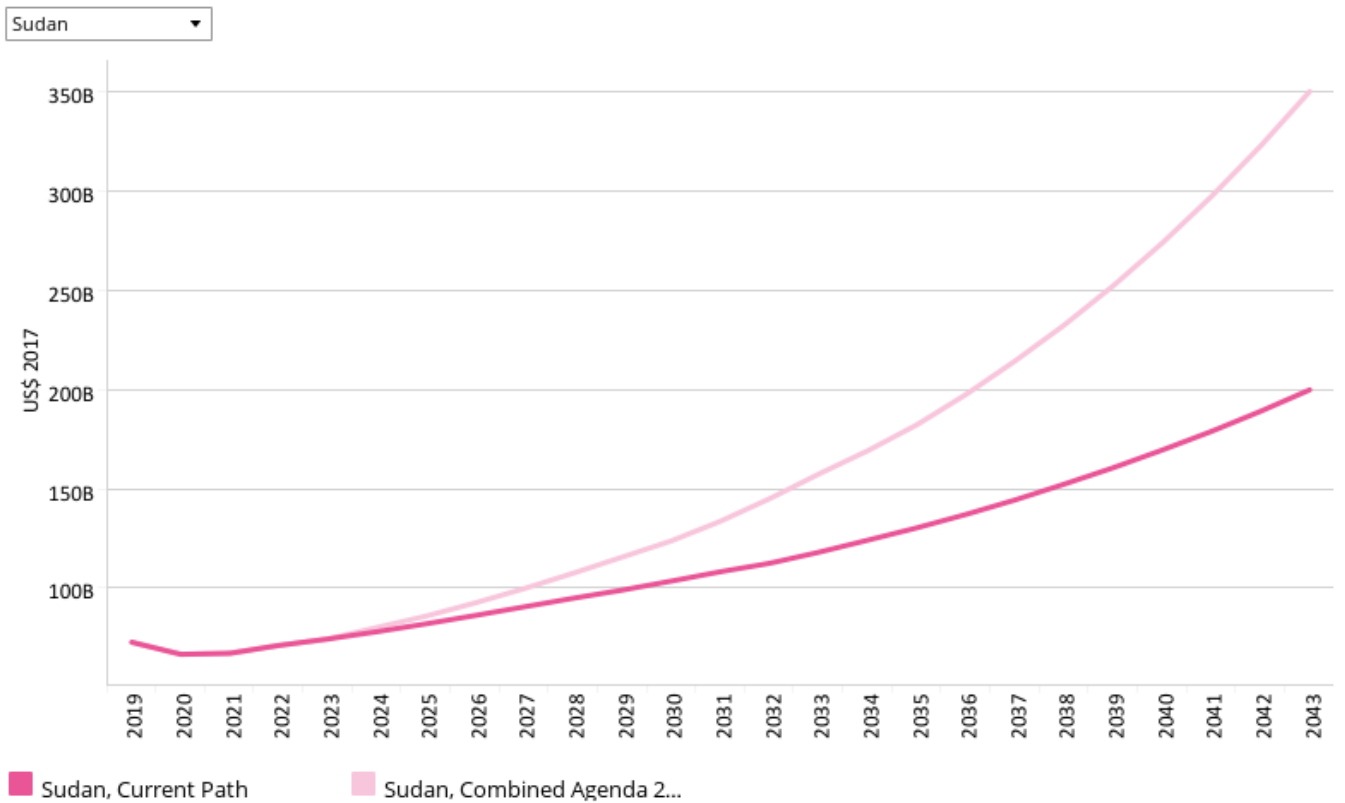
See [Chart 8](#) to view the Current Path forecast of the sectoral composition of the economy.

As a percentage of GDP, the agriculture sector's contribution to GDP records the largest improvement compared to the Current Path forecast until 2035 before being overtaken by the service sector. By 2043, the contribution of the service sector to GDP in the Combined Agenda 2063 scenario is about 6 percentage points larger than the Current Path forecast. The manufacturing sector's contribution is 6.1 percentage points below the Current Path forecast.

In absolute value, the service sector shows the most significant improvement compared to the Current Path with its value in the Combined Agenda 2063 scenario US\$102.9 billion larger than in the Current Path forecast for 2043. The service sector is followed by the agriculture sector with its value in the Combined Agenda 2063 scenario US\$18.7 billion larger than in the Current Path forecast by 2043.

Going forward, the service sector will likely continue to be the dominant sector of the Sudanese economy, although the manufacturing sector will grow appreciably in the Combined Agenda 2063 scenario.

**Chart 59: GDP in CP and Combined scenario, 2019–2043**  
 Billions US\$ 2017, market exchange rates



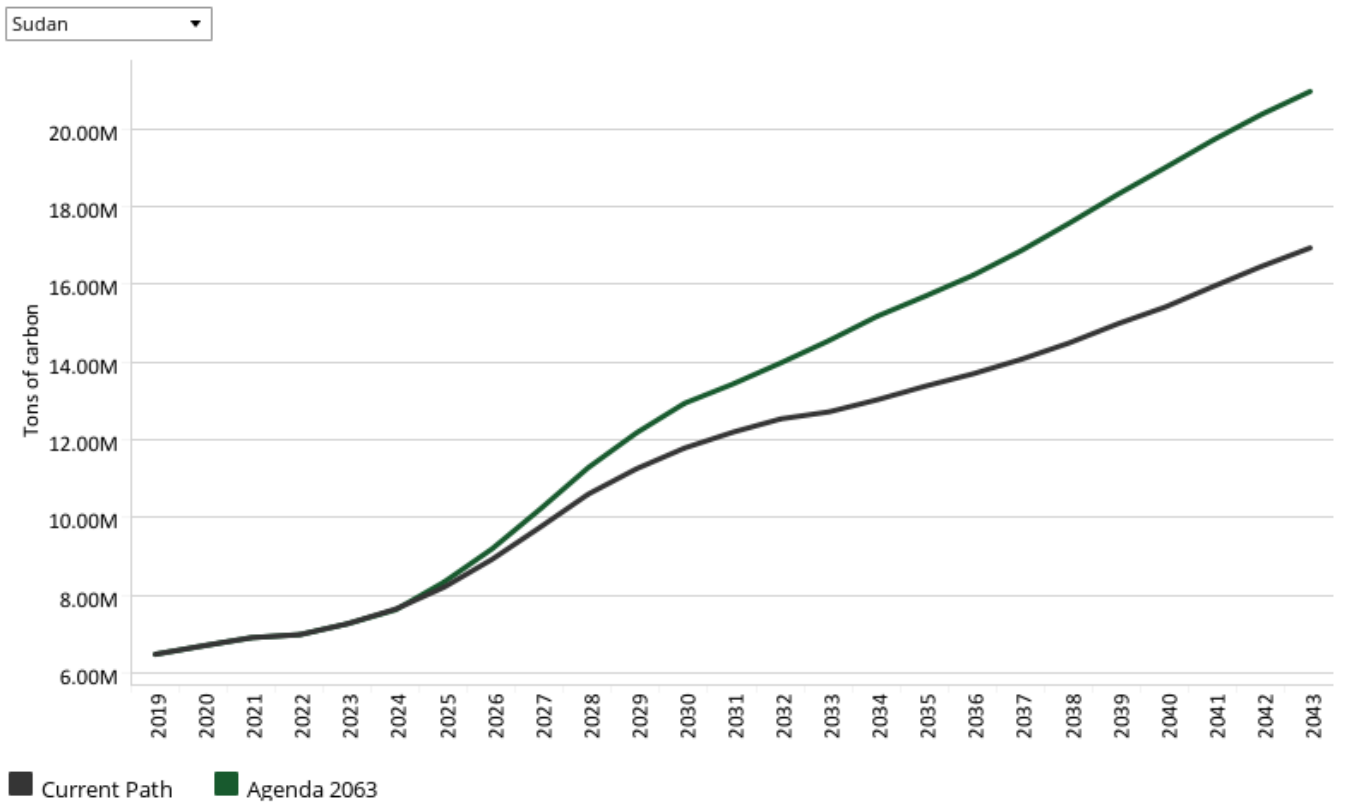
Source: IFs 7.63 initialising from International Monetary Fund World Economic Outlook database

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The Combined Agenda 2063 scenario dramatically impacts Sudan's economy (GDP) expansion. In the Combined Agenda 2063 scenario, the size of the economy is projected to expand from US\$72.7 billion in 2019 to US\$350.3 billion in 2043, which is a 382% increase over the period compared to a 175% increase in the Current Path forecast over the same period.

In 2043, the GDP of Sudan in the Combined Agenda 2063 scenario is US\$150.4 billion larger than in the Current Path forecast for the same year. The Combined Agenda 2063 scenario shows that a policy push across all development sectors is a viable approach to achieving sustained growth in Sudan.

**Chart 60: Carbon emissions in CP and Combined scenario, 2019–2043**  
 Million tons of carbon (note, not CO<sub>2</sub> equivalent)



Source: IFs 7.63 initialising from Carbon Dioxide Information Analysis Center data

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The Combined Agenda 2063 scenario significantly impacts carbon emissions, albeit from a very low base, due to the increased economic activity it causes.

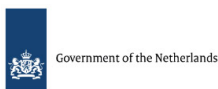
In this scenario, carbon emissions increase from 6.5 million tons in 2019 to 21 million tons by 2043 — a 223.1% increase between 2019 and 2043 compared with 160% in the Current Path forecast over the same period. In 2043, the carbon emissions in the Combined Agenda 2063 scenario amount to 4.1 million tons, higher than in the Current Path forecast.

The realisation of the Combined Agenda 2063 scenario would stimulate high economic growth and significantly reduce poverty in Sudan, but the cost in terms of environmental degradation will be relatively high. To mitigate the environmental impact of the Combined Agenda 2063 scenario, its implementation should be accompanied by concrete steps to accelerate the green energy transition.

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## About the authors

Dr Kouassi Yeboua is a senior researcher in African Futures and Innovation programme in Pretoria. He recently served as lead author on ISS studies on the long-term development prospects of the DR Congo, the Horn of Africa, Nigeria and Malawi. Kouassi has published on various issues relating to foreign direct investment in Africa and is interested in development economics, macroeconomics, international economics, and economic modelling. He has a PhD in Economics.

## About African Futures & Innovation

Scenarios and forecasting can help Africa identify and respond to opportunities and threats. The work of the African Futures & Innovation (AFI) program at the Institute for Security Studies aims to understand and address a widening gap between indices of wellbeing in Africa and elsewhere in the world. The AFI helps stakeholders understand likely future developments. Research findings and their policy implications are widely disseminated, often in collaboration with in-country partners. Forecasting tools inspire debate and provide insights into possible trajectories that inform planning, prioritisation and effective resource allocation. Africa's future depends on today's choices and actions by governments and their non-governmental and international partners. The AFI provides empirical data that informs short- and medium-term decisions with long-term implications. The AFI enhances Africa's capacity to prepare for and respond to future challenges. The program is headed by Dr Jakkie Cilliers.