



Sudan

Sudan: Conclusion and Recommendations

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Chart 38: Policy recommendations

Recommendations

- **Governance:** Stabilise key population centres and economic corridors, reconstitute core state capability and restore credible public financial management, oversight and inclusive decision-making.
- **Agriculture:** Restore productive capacity in key breadbasket zones, scale irrigation and climate resilience, reduce post-harvest losses and prioritise food security during recovery.
- **Macroeconomy:** Re-establish basic monetary and fiscal coordination, broaden revenue mobilisation without overburdening recovery and support diversification through value addition.
- **Manufacturing:** Develop safe-area industrial recovery zones, prioritise agro-processing as a first mover and link firm support to skills, productivity and inclusive labour participation.
- **Trade:** Restore trade corridors and market infrastructure, lower non-tariff barriers, streamline customs and develop an AfCFTA readiness plan focused on competitiveness.
- **Infrastructure:** Prioritise strategic transport corridors, rehabilitate damaged energy assets, expand rural electrification and use digital infrastructure to support service delivery and MSMEs.
- **Financial flows:** Protect humanitarian and recovery aid, shift financing toward productive capacity and foundational systems, and crowd in FDI through credibility reforms.
- **Health and WaSH:** Reopen and protect health services, rebuild disease surveillance and vaccination systems, and reconstruct WaSH infrastructure to reduce disease risks.
- **Education:** Reopen schools where feasible, stabilise teachers, protect girls' education and rebuild quality, progression and vocational pathways aligned with recovery needs.

Chart 38 summarises the policy recommendations.

A delicate balance between immense potential and profound vulnerability shapes Sudan's development trajectory. The country possesses substantial natural and demographic assets: vast arable land capable of supporting an agricultural transformation, a youthful population, strategic access to the Red Sea and mineral endowments that could form the backbone of a diversified economy. Yet, these advantages have not translated into sustained development.

Sudan's economic potential has been constrained for decades by the secession of South Sudan, recurrent conflict and political instability, international sanctions and global shocks, including the COVID-19 pandemic. The 2023 civil war has dramatically deepened the country's economic fragility and reversed years of developmental gains. The economy is now trapped in a cycle of contraction, rising poverty and widening inequality. Average income levels have fallen to those recorded in 1992, while extreme poverty has worsened beyond its incidence in the 1980s. The analysis estimates that Sudan lost US\$6.4 billion in 2023 alone due to the conflict, equivalent to a per capita income loss of about US\$500. In the same year, nearly 6.9 million additional Sudanese were pushed into extreme poverty as a direct consequence of the war.

On its current trajectory, Sudan will struggle to reduce poverty or achieve meaningful structural transformation. Extreme poverty remains high, inequality declines only marginally and human development outcomes are far below the continental

average. Although gradual improvements will occur over the long term, Sudan is unlikely to meet the Sustainable Development Goals or the aspirations of Agenda 2063. The economy faces multidimensional pressures across all key sectors, each requiring urgent and coordinated attention.

To examine the impact of the war on the economy and poverty reduction, using two illustrative scenarios. The first is the No-Conflict scenario, which takes a retrospective view of what the development prospects would have been if the 2023 conflict had not occurred. To do this, the Current Path (adjusted for the impact of the conflict) is compared with Sudan's development prospects before the conflict (based on the IMF growth projection). The second step was to examine the impact of a protracted conflict in Sudan through 2030, with a delayed economic recovery.

In 2023, Sudan's GDP in the No-Conflict scenario was estimated at US\$32.4 billion. Compared with the Current Path, the economic losses from the conflict in 2023 alone totalled US\$6.4 billion. This translates into a GDP per capita loss (in PPP) of about US\$500, reflecting a significant deterioration in the standard of living for the Sudanese population. By 2043, Sudan's GDP under the No-Conflict scenario would have reached US\$57.6 billion. This represents an estimated GDP loss of about US\$18.8 billion by 2043, equivalent to a per capita income loss of about US\$752.

The conflict has also severely undermined progress in poverty reduction. In the No-Conflict scenario, around 20 million Sudanese (representing 39.2% of the population) would have lived below the international poverty line of US\$2.15 per day in 2023. Comparing this to the Current Path means that almost 6.9 million more Sudanese were pushed into extreme poverty in 2023 alone due to the conflict. By 2043, this would have worsened such that nearly 13.4 million additional Sudanese would have been pushed into extreme poverty in the Current Path due to the conflict compared to the No-Conflict scenario.

In the Protracted Conflict scenario, Sudan's GDP is projected to fall to US\$23.1 billion in 2043, representing a loss of US\$34.5 billion relative to the No-Conflict scenario. This corresponds to a GDP per capita loss of US\$1 725 in 2043, underscoring the devastating economic toll of prolonged conflict.

The consequences of poverty are severe. About 52.4 million Sudanese (equivalent to 63.3% of the population) will live below the extreme poverty line of US\$2.15 in the Protracted Conflict scenario by 2043. This translates into 34.1 million more people living in extreme poverty compared to the No-Conflict scenario. If the current conflict persists, almost 34 million additional Sudanese risk falling into extreme poverty by 2043. Thus, without peace and recovery efforts, the war will continue to erode livelihoods, reverse development gains and entrench poverty for millions.

While reversing this trajectory is challenging, it is not beyond reach. The Combined scenario presents a realistic yet ambitious outlook for Sudan's development by 2043. Under this scenario, Sudan's GDP could expand by an additional US\$19.3 billion above the Current Path, with the economy growing at an average rate of 5.0% compared to 2.4% on the Current Path. This translates into an additional US\$792 in GDP per capita by 2043. More importantly, 17.3 million more people could be lifted out of extreme poverty in this scenario, and life expectancy would rise by an additional 4.2 years relative to the Current Path. However, realising this scenario comes with trade-offs: carbon emissions would rise by 32.6% compared to the Current Path, underscoring the need for a green, renewable-energy-led development approach.

The sectoral intervention scenarios further demonstrate that targeted and coordinated reforms can significantly enhance outcomes. The Agriculture, Governance, AfCFTA and Financial Flows scenarios show particularly strong impacts on GDP per capita, poverty reduction and economic diversification. These results highlight the centrality of strengthened governance, particularly in ending the conflict, driving an agricultural revolution, promoting regional integration and attracting external financial inflows, such as aid, to Sudan's long-term development strategy.

The alternative is dire, as the Protracted Conflict scenario illustrates the catastrophic cost of continued instability. If the

war were to persist until 2030, Sudan's GDP would fall to US\$23.1 billion by 2043, resulting in losses of US\$34.5 billion relative to the No-Conflict scenario. GDP per capita would decline by US\$1 750, and an additional 34 million Sudanese would fall into extreme poverty. Such an outcome would entrench humanitarian crises, erode state capacity and close the window for meaningful recovery.

Ultimately, Sudan's future depends on an urgent political settlement that restores security and the rebuilding of state institutions. Peace is the single most critical precondition for restoring livelihoods, rebuilding the economy and reopening credible pathways toward development and inclusive growth. Beyond ending the conflict, the country must adopt a forward-looking, coherent and data-driven development framework that strengthens governance, revitalises productive sectors, expands opportunities for its youthful population and builds resilience to future shocks. Unlocking its potential further requires the restoration of state institutions and a coordinated long-term strategy that places human development, structural transformation and regional integration at its core. With coherent reforms and sustained commitment, Sudan can transition from fragility toward recovery and from potential to long-term structural transformation.

Based on the modelling results and sectoral analysis, Sudan's recovery strategy should prioritise the following policy actions:

Governance:

- **Stabilise and secure service corridors:** Prioritise securing key population centres and economic corridors (ports, markets, irrigation zones, transport nodes) to restart production chains and reverse the paralysis of institutions. This directly supports the baseline assumption that a cessation of hostilities is foundational to recovery.
- **Reconstitute core state capability:** Establish a minimum-functioning civil administration for revenue collection, basic regulatory delivery, and public financial management to reverse the "absence of state institutions and administrative capacity."
- **Anti-corruption and credibility reforms:** Embed transparent emergency procurement, publish budget execution reports, and restore oversight bodies to address the severe governance-capacity constraints, including very weak revenue mobilisation and high perceived corruption.
- **Inclusion and social compact:** Move beyond the historic centre-periphery imbalance by institutionalising inclusive decision-making and equitable resource-sharing mechanisms, reducing the incentives for "war-making as an avenue towards resource-sharing and development."
- **Protect the poor during transition:** Expand welfare transfers and targeted social support as governance improves, consistent with the governance scenario's emphasis on social transfers to alleviate extreme poverty and reduce inequality.

Agriculture:

- **Restore productive capacity in key breadbasket zones:** Rapidly rehabilitate agricultural assets and input supply chains in conflict-affected producing regions (e.g., Darfur, Kordofan, Gezira) where disruption, looting and insecurity have undermined yields and market access.
- **Scale irrigation and climate resilience:** Prioritise investments in irrigation systems and water control to reduce reliance on low-yield rain-fed production and buffer drought/flood variability, while strengthening extension services and land management to curb soil erosion and declining fertility.

- **Reduce post-harvest losses:** Invest in storage, cold chains where feasible, and rural feeder roads to address post-harvest losses and strengthen market connectivity.
- **Re-open rural finance:** Develop risk-sharing facilities and simplified financial products for smallholders to address restricted access to finance and rising input costs, which are rendering farming increasingly unprofitable.
- **Food security first:** Align strategy with the scenario, emphasising improved yields, better seed and fertiliser technology, expanded irrigation, and reduced food loss and waste—prioritising self-sufficiency over exports in the recovery period.

Macroeconomy:

- **Emergency macro-stabilisation package:** Re-establish basic monetary and fiscal coordination to curb inflationary pressures and restore minimal confidence in transactions, alongside restoring the integrity of payment systems to enable commerce and humanitarian delivery.
- **Revenue mobilisation without overburdening recovery:** Focus on gradually broadening the tax base through digitisation and simplified compliance, rather than punitive tax drives, to support the state's capacity deficit while protecting fragile livelihoods.
- **Diversification through value addition:** Tie public investment and incentives to value-chain development in agriculture-linked processing and light manufacturing to reduce dependence on raw commodity exports and widen employment creation.

Manufacturing:

- **Industrial recovery zones and relocation support:** Formalise safe-area industrial parks and temporary relocation facilities for firms displaced from conflict zones, with targeted energy and logistics support to reduce the binding constraints posed by power outages and transport disruptions.
- **Agro-processing as the first mover:** Prioritise agro-processing (sugar, vegetable oils, textiles, cotton ginning) to link agricultural recovery to industrial jobs and exports, while stabilising food systems.
- **Skills and productivity compact:** Pair firm support with worker training and performance systems to address weak worker training and productivity constraints, linked to TVET and targeted upskilling.
- **Gender-inclusive labour participation:** Implement affirmative policies, training and childcare/safety measures to increase female labour participation, consistent with the manufacturing transition logic and broader inclusion objectives.
- **Mitigate inequality during transition:** Expand welfare transfers and labour protections for low-skilled workers during early industrialisation, as envisaged in the manufacturing scenario approach.

Trade:

- **Restore trade corridors and market infrastructure:** Rehabilitate key markets and logistics nodes (including cross-border trade points) that have been destroyed and where movement has been restricted, especially in conflict-affected regions.
- **Lower non-tariff barriers and streamline customs:** Reduce high trade costs by simplifying customs procedures and tackling non-tariff barriers that impose additional costs on businesses, paired with digital trade facilitation where

connectivity allows.

- **Export diversification and value addition:** Shift from exporting raw materials toward processed goods, leveraging agro-processing and light manufacturing, consistent with the report's diagnosis of low value addition.
- **AfCFTA readiness plan:** Create a phased roadmap to exploit preferential market access and productivity gains from trade openness, so Sudan can translate membership into concrete competitiveness improvements rather than nominal participation.

Infrastructure:

- **Transport—focus on strategic corridors first:** Prioritise road rehabilitation on routes that unlock agricultural areas and connect to markets/ports, recognising that improved road infrastructure reduces freight costs and strengthens market connectivity.
- **Energy—close the access and reliability gap:**
 - Accelerate rural electrification to narrow the pronounced urban–rural disparity in access and reduce welfare losses and productivity constraints.
 - Rehabilitate damaged energy assets and protect critical infrastructure to stabilise supply, given war-related damage to key facilities.
- **Clean cooking transition as a health–energy co-benefit:** Pair electrification with affordability measures and reliable supply to reduce heavy reliance on traditional stoves, lowering indoor air pollution and associated health burdens.
- **Digital infrastructure as an enabler:** Expand fixed broadband and affordable internet access to support e-government, MSMEs, and service delivery, given low internet penetration and the inequality costs of limited digital access.

Financial Flows:

- **Protect and coordinate humanitarian and recovery aid:** Maintain predictable aid flows in the medium term, recognising that Sudan remains heavily dependent on aid for basic services and that sharp declines would be devastating for recovery.
- **Shift from emergency to catalytic financing:** Rebalance aid toward rebuilding productive capacity and foundational systems (PFM, health systems, schools, irrigation, and corridors) to reduce long-run dependency while protecting human development.
- **Crowd in FDI with credibility reforms:** Improve stability and the business climate to attract more (especially manufacturing) FDI, leveraging investment frameworks while addressing the core deterrents of political instability and weak institutions.
- **Formalise remittance channels and reduce transaction costs:** Strengthen payment infrastructure, expand access to ID solutions, and regulate to reduce leakage and costs, given the war's disruption to banking and reliance on informal mechanisms.
- **Reduce illicit outflows:** Pair improved financial governance with enforcement and transparency measures to align with the Financial Flows scenario logic of reducing outward illicit financial flows.

Health and WaSH:

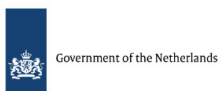
- **Reopen and protect service delivery:** Rapidly restore functionality of health facilities and protect health workers, prioritising conflict-affected states and displacement hubs where outbreaks and service collapse are most acute.
- **Outbreak control and surveillance reset:** Rebuild disease surveillance and vaccination campaigns to contain cholera, malaria, dengue and measles, and re-establish supply chains for essential medicines.
- **Maternal and child health as a recovery anchor:** Prioritise reproductive health services and paediatric care, given severe access constraints for women and heightened child vulnerability.
- **WaSH infrastructure reconstruction:** Rehabilitate urban water networks and restore pumping capacity (including fuel/power solutions) where systems have become inoperable. Scale safely managed sanitation and end open defecation through durable community sanitation infrastructure, moving beyond temporary emergency measures that increase disease risk and expose women and children to harm.
- **Integrated health–WaSH programming:** Institutionalise joint planning and financing between health and WaSH clusters to reduce transmission channels for communicable diseases and improve resilience.

Education:

- **Emergency reopening and learning continuity:** Reopen schools where feasible, rehabilitate damaged facilities, and deploy temporary/accelerated learning programmes for displaced learners, given the vast scale of disruption and low operational school share.
- **Teacher stabilisation package:** Restore salary payment mechanisms and safety protections to reduce attrition and rebuild capacity.
- **Protect girls' education:** Implement targeted safety, cash support, and community protection measures to counter the heightened risks of violence, early marriage and dropout for girls.
- **Rebuild quality and progression pathways:** Reduce leakage from lower secondary onward through remedial programmes, transition support, and investments in learning materials—aligned with the Education scenario's emphasis on improving intake, transition, graduation and quality. Expansion of vocational and technical education aligned with agricultural and manufacturing recovery.

Achieving this will require sustained commitment from Sudanese leaders, regional partners and the international community. Without such coordinated effort, Sudan risks remaining trapped in a cycle of conflict, institutional fragility and deepening poverty.

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Mr Enoch Randy Aikins joined the AFI in May 2021 as a Researcher. Before that, Enoch was a research and programmes officer at the Institute for Democratic Governance in Accra in charge of local governance reforms, poverty and inequality and public sector reforms. He also worked as a research assistant (economic division) with the Institute for Statistical Social and Economic Research at the University of Ghana. Enoch's interests include African politics and governance, economic development, public sector reform, poverty and inequality. Enoch is a Young African Fellow at the School of Transnational Governance, European University Institute in Florence and has an MPhil in economics from the University of Ghana, Legon.

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