

An aerial photograph of a city, likely Khartoum, Sudan, showing a mix of urban development and greenery. In the foreground, a multi-lane highway with a yellow and black striped curb runs horizontally. A white sedan is driving on the road. Behind the highway, a dense canopy of lush green trees covers a large area. To the left, several multi-story buildings with light-colored facades and arched windows are visible. In the background, a wide river flows through the city, with a bridge spanning across it. The sky is clear and bright.

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# Beyond the Conflict: Charting a Path to Sustainable Growth and Development in Sudan

Introduction



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## Introduction

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### Briefly

This report examines Sudan's long-term development prospects in the aftermath of the April 2023 civil war, to inform scenario-building on Sudan's future development potential under alternative pathways. It starts from the central paradox that Sudan's abundant natural resources, a youthful population and a propitious geography, including maritime access to the Red Sea, have not translated into transformative development, largely because a poor governance record and protracted conflict have constrained effective state-building and paralysed institutions.

Against this background, the UN Development Program (UNDP) requested the support of the African Futures & Innovation Programme at the Institute for Security Studies (AFI-ISS) to enhance development planning and decision-making in Sudan. The report aims to support UNDP in providing a comprehensive analysis of Sudan's development prospects, aligned with the broad development ambitions reflected in the Sustainable Development Goals (SDGs) and Agenda 2063.

The report's importance is twofold. First, it provides a coherent, data-driven baseline (a conflict-adjusted Current Path) against which realistic but ambitious reforms can be assessed, using the International Futures (IFs) modelling system and benchmarked to Africa's low-income countries. Second, it demonstrates, quantitatively and sector-by-sector, that Sudan's recovery hinges on a durable political settlement that ends the war, restores state capability, and allows a sequenced programme of structural reforms to take root across governance, the productive sectors, and human development.

The remainder of the report is structured as follows: Chapter 2 provides the background to Sudan; Chapter 3 discusses the methodology; Chapter 4 discusses the Current Path trend; and Chapter 5 focuses on the different scenarios. The final and concluding chapter provides key takeaways and recommends policy options.

### Background

Sudan gained independence in 1956. Despite attaining nearly seven decades of autonomy and self-rule from the Anglo-Egyptian condominium, the country's socio-economic achievements do not match its potential, given its geography, natural resource endowments, and population size. A poor governance record, evident in protracted conflicts and authoritarian rule, has constrained effective state-building and left few prospects for transformative development.

Straddling and connecting north, east and central Africa, [Sudan](#) is the third-largest country in Africa after Algeria and DR Congo, with a land area of approximately 1 868 000 square kilometres. It shares borders with seven neighbouring countries, including Libya, Chad, the Central African Republic, Eritrea, Ethiopia, South Sudan and Egypt. Sudan's maritime access to the Red Sea has the potential to serve as a logistical hub for countries in East Africa and as a gateway to landlocked countries in Central Africa. This geographical setup provides development opportunities through trade and integration in the region. However, it has also brought geopolitics into a region with a long history of destabilisation, external interference, persistent intra-state conflict and proxy efforts, most notable in the context of the ongoing war.

Chart 1: Map of Sudan



Source: United Nations Environment Programme Sudan - The boundaries and names shown and the designations used on this map do not imply official endorsement or acceptance by the ISS or UNDP.

Sudan's capacity to serve as a hegemonic player in the region is heightened by its natural resource endowments. Sudan's mineral deposit catalogue includes gold, uranium, chromite, gypsum, mica, marble and iron ore. Arable land and a wealth of livestock give Sudan the potential to serve as a key regional player in food value chains. However, these endowments have not translated into broad-based growth, employment creation, or improved welfare. Recurrent conflict, weak institutions, and policy inconsistency have constrained investment, undermined productivity, and limited value addition, leaving natural resource wealth insufficient to drive structural transformation.

Before South Sudan's secession in 2011, Sudan was one of the largest oil producers. Categorised as a petro-state, oil exports accounted for *approximately* 50% of government revenues and between 90-95% of total export earnings. Other prominent sectors comprising the Sudanese economy include agriculture, manufacturing, mining and services. Chronic trade deficits, particularly after South Sudan's secession, and a lack of diversification created a contracting economy with high inflation, growing debt and chronic unemployment.

For most of its post-independence political history, the country has been beset by internal conflicts that have weakened its ability to play a leadership role in the region. Decades of internal conflicts have eroded Sudan's governance and economic resilience, leaving its agricultural systems vulnerable. Today, this legacy of instability continues to undermine food security, as disrupted supply chains and weakened institutions struggle to meet the population's needs. For example, continuous food price hikes due to a drop in export earnings 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, which was expected to last 39 months, was cut short on 25 October 2021 when the Sudanese military, led by General Abdel Fattah al-Burhan, seized power in a military coup.

Since April 2023, Sudan has been embroiled in another civil war between the Sudanese Armed Forces (SAF) and the paramilitary Rapid Support Forces (RSF). The conflict has led to catastrophic humanitarian consequences. More than 150 000 people have been killed and nearly 15 million have been displaced, with 24 million people facing food insecurity, while 19 million people lack access to safe water and sanitation. The war has paralysed governance and resulted in the near-total collapse of state institutions. Beyond displacement and food insecurity, the war has disrupted health and education service delivery, damaged market infrastructure, and weakened production systems across agriculture, manufacturing, and services, deepening vulnerabilities and complicating recovery.

Despite its potential given its natural resources, youthful population, arable land, blue economy and maritime attributes along the Nile and access to the Red Sea, Sudan often ranks amongst the poorest countries according to the world's human development indicators. According to the 2023-2024 Human Development Report (HDR), Sudan ranks 170 out of 193 countries. This low ranking reflects multi-dimensional constraints, including economic hardship and inequality, disrupted schooling and low learning outcomes, and a health system under severe strain. Recent years suggest stagnation and, since the outbreak of war, a likely regression in key human development outcomes as service delivery and household welfare deteriorate.

While Sudan's future looks precarious given the nature of the war and the tremendous investments required for post-conflict reconstruction, once a permanent ceasefire is achieved, there's hope for stabilisation and recovery scenarios. The trifecta of natural resources, a youthful population and propitious geography could help Sudan to realise its development potential and act as a pivotal player in the region. However, there is an urgent need for a political solution to end the conflict and address the humanitarian crisis. Building resilience and reimagining development in Sudan could be crucial steps towards achieving peace and stability.

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### Cite this research

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## 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.