

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 blue. The text 'ISS | AFRICAN FUTURES' is overlaid in the top left corner.

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

Scenarios



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Scenarios

- Briefly
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Briefly

The study models four main scenarios to analyse the long-term future of Sudan: the Current Path, Sudan Rising, and Conflict scenarios, as presented below.

Current Path adjustment/Baseline scenario

As noted above, the Current Path analysis provides a baseline against which more ambitious policy interventions can be assessed. It represents a continuation of current policy choices and technological advancements and assumes no significant shocks or catastrophes.

The protracted conflict in Sudan continues to have severe and wide-ranging impacts on key sectors of the country's already fragile economy. The escalation of violence has accelerated the deterioration of infrastructure in affected regions, severely undermining agricultural productivity, industrial output and service delivery. Insecurity, restricted market access and widespread looting have disrupted production chains and compromised storage facilities. These disruptions have adversely affected domestic and international trade, leading to significant shortages of essential commodities and exacerbating economic instability.

To reflect the war's impact in the baseline scenario, the Current Path is adjusted to capture worsened security and its impact on key sectors of the economy. A key assumption in this scenario is that a peace agreement will be reached and the conflict will end by 2026. These include adjustments in:

1. **Security:** The security situation in Sudan has worsened since the 2019 peace agreement and the resumption of conflict in 2023. According to the [Ibrahim Index of African Governance](#), Sudan's score on safety and security has declined by 120% from 56 in 2018, when the agreement was signed, to 25.4 in 2023. In 2023 alone, Sudan's score fell by 60% from 2022, making it the worst performer on this index on the continent. To reflect these changes in Sudan's security situation that have already occurred, the Current Path is adjusted by reducing Sudan's security score in 2023 by 55% and maintaining that level through 2026.
2. **Economic growth:** To reflect the impact of the war on the country's socio-economic situation, the Current Path is adjusted to reflect Sudan's GDP growth forecast, in line with the latest World Bank Macro poverty [outlook](#). This World Bank projection from 2023 to 2027 provides estimates of GDP contraction in 2023 and 2024, and a forecast for 2025 to 2027, assuming peace by 2026. The inclusion of the World Bank three-year growth forecast helps smooth out the transition from forecasts initialised from the base year (2020) to subsequent recorded growth rates, which may thus differ from the IFs forecast.
3. **Agriculture:** A rapid [assessment](#) conducted by the Food and Agriculture Organisation (FAO) revealed a significant contraction in Sudan's agricultural activity, with the total area under cultivation declining by 15% in 2023 compared to the previous year. Key staple crops such as sorghum and millet were particularly affected, with 16% and 50% reductions

in planted areas, respectively. This led to estimated declines of 24% in sorghum production and 50% in millet production. Additionally, data from the [World Bank](#) indicate that the agricultural sector shrank by 16.3% in 2023. Based on these assessments, a 15% reduction in agricultural yields is applied to Sudan for that year. In the absence of more detailed or reliable production estimates for 2024, the World Bank's estimated contraction of 7.6% for the agricultural sector is adopted as a proxy. Accordingly, a 7% reduction in agricultural yields is applied for Sudan in 2024.

4. Industry: Khartoum and the central states form Sudan's industrial backbone. Estimates show approximately 66% of all manufacturing establishments in the country are concentrated in Khartoum, Gezira, Darfur and Kordofan. This geographic concentration is largely attributed to relatively better access to transportation and energy infrastructure, higher population density and the availability of labour and markets. However, the ongoing conflict has severely disrupted industrial activity in these regions, with an estimated 90% of the sector destroyed as of December 2023. To reflect the damage to manufacturing output, the World Bank's estimates of the contraction in manufacturing for 2023 and 2024 are used.
5. Trade: Since April 2023, the ongoing conflict in Sudan has significantly undermined trade nationwide, with the most acute impacts observed in Darfur and other conflict-affected regions. The conflict has severely disrupted both domestic and cross-border trade. At the same time, embargoes imposed by the Rapid Support Forces in Darfur have curtailed the movement of goods and further isolated the region from the national economy. To reflect this in the baseline scenario, the [World Bank's](#) estimates of import and export contractions for 2023 and 2024 are used.
6. Services: An important sector severely damaged by the conflict. The disruption to medical, educational, financial, telecommunications, retail and wholesale services has hindered the growth of the sector since the start of the conflict. To capture this, the [World Bank's](#) estimate of the contraction in the service sector for 2023 and 2024 is applied. In addition, government expenditure on key services such as education and health is reduced, as these services were affected by the conflict.
7. Infrastructure: The conflict in Sudan has caused significant damage to the country's infrastructure, with long-term economic and population implications. To capture this, a substantial reduction in the magnitude of government infrastructure expenditure for 2023 and 2024 is modelled.

The specific estimates for the current path adjustment are provided in Table 2 in the annex.

Sudan Rising/Combined scenario

The study models the potential development impact of interventions in eight key sectors, followed by an integrated Combined scenario (referred to as Sudan Rising) that demonstrates their cumulative effect. The eight sectors cover all aspects of national development and have been carefully curated for this purpose. Details on each scenario, including a list of interventions, are available on the [Technical page](#) of the African Futures website.

All interventions are for 10 years, starting in 2027, and are maintained at the final value thereafter. Each sectoral scenario is benchmarked against progress achieved by high-performing countries at similar levels of development in specific areas, such as improvements in net primary school completion rates (in the Education scenario). The eight sectoral scenarios explored in this report and applied in each country study include:

1. Demographics and Health/WaSH: Envisions ambitious improvements in child and maternal mortality rates, enhanced access to modern contraception and decreased mortality from communicable diseases (e.g., AIDS, diarrhoea, malaria, respiratory infections) and non-communicable diseases (e.g., diabetes), alongside advancements in safe water access and sanitation. This scenario accelerates the demographic and health transition, supported by investments in health and water, sanitation and hygiene (WaSH) infrastructure.
2. Agriculture: Envisions an agricultural revolution that ensures food security through ambitious yet feasible increases in

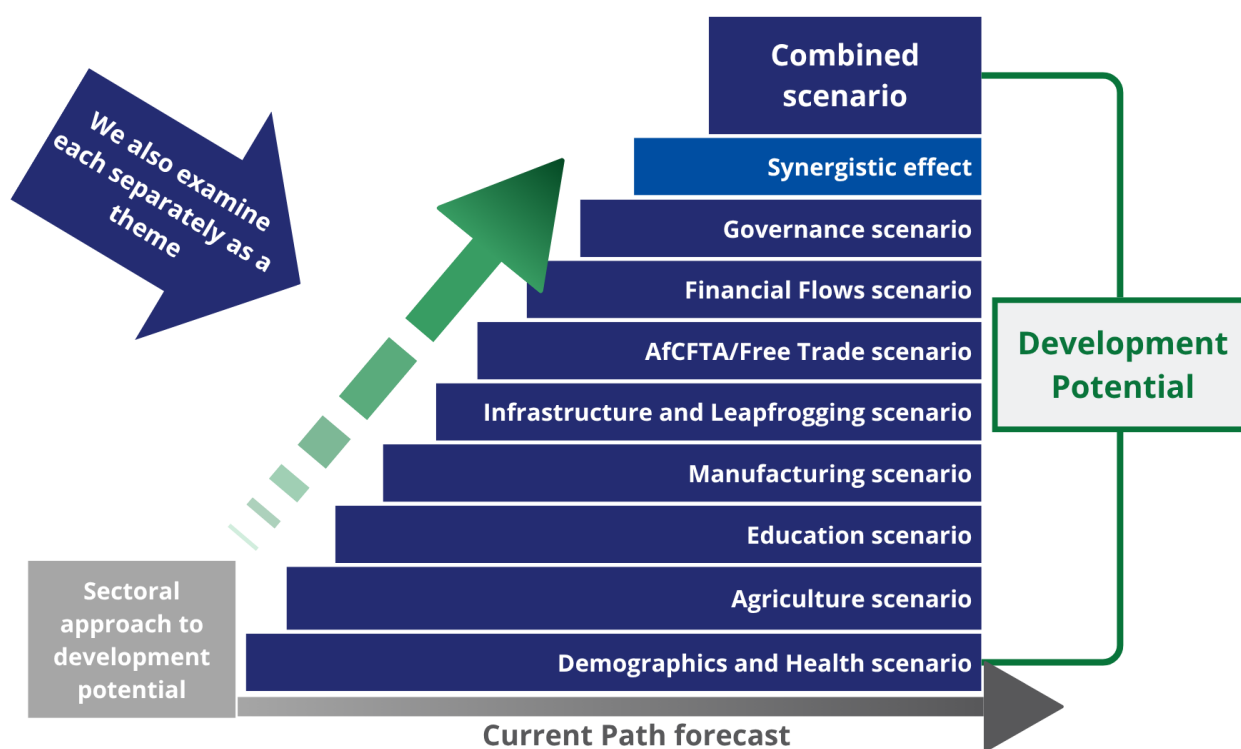
yields per hectare, thanks to improved management, seed, fertilisers, technology and expanded irrigation. Efforts to reduce food loss and waste are emphasised, with increased calorie consumption as an indicator of self-sufficiency and prioritising it over food exports. Additionally, enhanced forest protection demonstrates a commitment to sustainable land-use practices.

3. Education: Represents reasonable but ambitious improvements in intake, transition and graduation rates from primary to tertiary levels and better quality of education at primary and secondary levels. It also models substantive progress towards gender parity at all levels, additional vocational training at the secondary school level, and increases in the share of science and engineering graduates.
4. Manufacturing: Reasonable but ambitious growth in manufacturing is envisaged through increased investment in the sector, research and development (R&D), enhanced labour participation rates and improved government regulation of businesses. This aims to enhance labour participation rates in the economy.
5. AFCFTA: Represents the impact of fully implementing the African Continental Free Trade Area by 2034. The scenario increases exports in manufacturing, agriculture, services, ICT, materials and energy. It also includes improved multifactor productivity growth from trade and reduced tariffs for all sectors.
6. Large Infrastructure and Leapfrogging: Involves ambitious investments in road and renewable energy infrastructure, improved electricity access and accelerated broadband connectivity. It emphasises adopting modern technologies to enhance government efficiency. It incorporates significant investments in major infrastructure projects such as rail, ports and airports (other infrastructure), while highlighting the positive impacts of renewables and ICT.
7. Financial Flows: Represents a reasonable but ambitious increase in inward flows of worker remittances, aid to poor countries and the stock of foreign direct investment (FDI) and additional portfolio investment inflows. Outward financial flows are reduced to emulate a reduction in illicit financial outflows.
8. Governance: Better governance consists of stability, capacity and inclusion. It measures a state's progress by averaging these three indices. To this end, it includes an index (0-1) for each dimension, with higher scores indicating better outcomes. The scenario also includes additional welfare transfers that alleviate extreme poverty and reduce inequality.

The Combined scenario integrates all eight sectoral scenarios to provide an optimistic (but realistic) view of the country's development ceiling by 2043. The approach is presented in Chart 3. This approach:

- Offers a realistic yet ambitious projection of how structural reforms could accelerate development.
- Allows for comparisons between the Current Path (business-as-usual) and transformational development potential.
- Highlights preconditions for sustainable development, such as regional stability, trade facilitation and foreign investment.
- Explores the costs of instability, showing how governance failures hinder long-term progress.

Chart 3: Sectoral approach to development potential



Conflict scenario

The first two scenarios modelled for the study adopt an optimistic approach to capturing Sudan's development potential. In reality, though, this may not be the case. As such, two other scenarios are modelled in the report's conclusion for comparison with the baseline and Sudan Rising scenarios. These include:

1. Protracted Conflict: This scenario assumes that the conflict will continue until 2030, when a peace agreement is reached. It reflects the baseline scenario with the key assumption that the conflict continues and destroys key sectors of the Sudanese economy.
2. No-Conflict: This scenario takes a retrospective lens on what the development prospects would have been if the 2023 conflict had not occurred, based on the IMF growth projection before the conflict.

A detailed list of interventions, benchmarking and estimates of all the scenarios are provided in Table 3 in the annex.

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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.