

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

Sectoral Scenario Comparison



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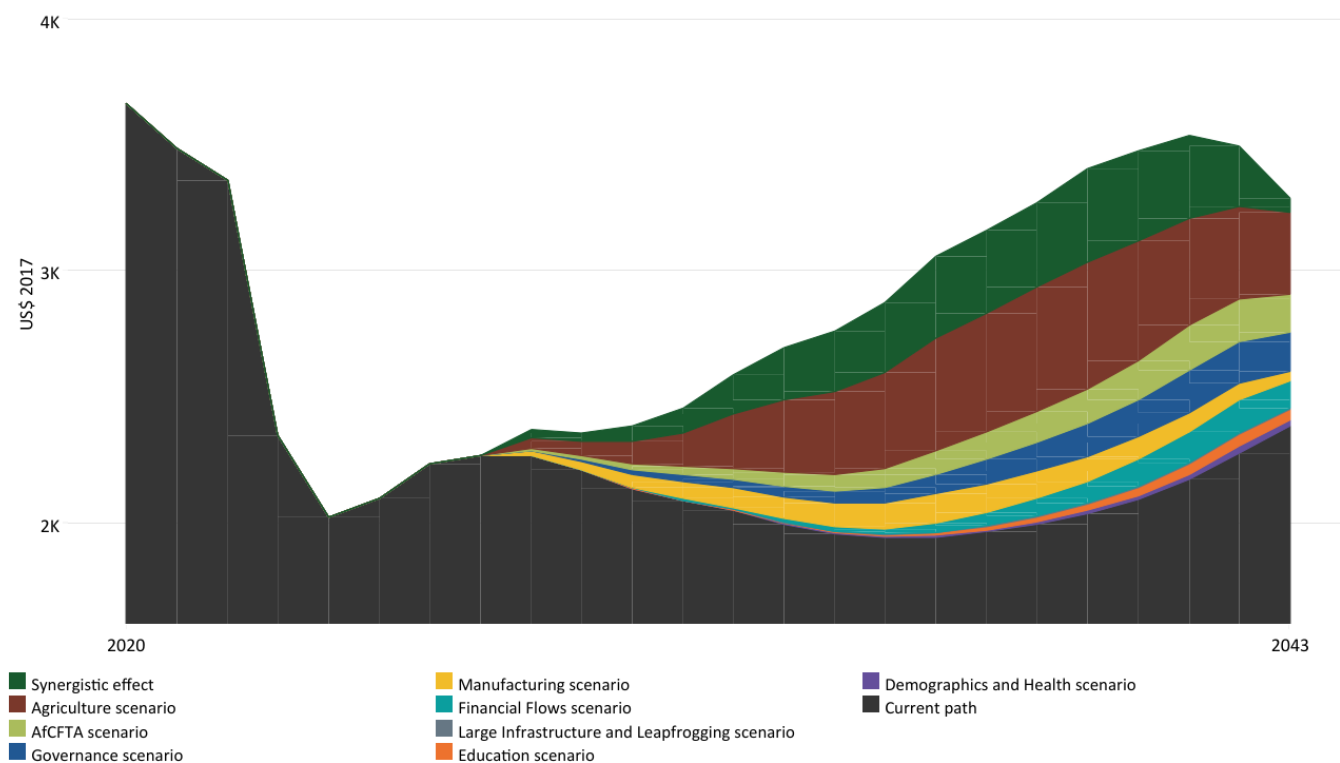
The scenarios with the greatest impact on GDP per capita in Sudan by 2043 will be the Agriculture scenario, followed by the Governance, the AfCFTA and the Financial Flows scenarios. Regarding poverty reduction, the Governance scenario has the greatest impact, followed by the Agriculture, AfCFTA, and Financial Flows scenarios. These four sectors are the most critical for raising living standards and eradicating poverty in Sudan.

In the Agricultural scenario, Sudan's GDP per capita (PPP) will increase to US\$2 707 by 2043, up US\$323 (13.5%) from the Current Path projections for that year. Likewise, in this scenario, the number of poor people will decline to 28.2 million (equivalent to 34.8% of the population), compared to the Current Path of 31.7 million people (38.9%) by 2043, meaning that an agricultural revolution in Sudan has the potential to reduce extreme poverty by an additional 4.7 million people. This is not surprising given that nearly 80% of the Sudanese population depends on the agricultural sector for their livelihoods.

The impact of the Agriculture scenario underscores the importance of Sudan's agricultural sector to economic growth and poverty eradication, with the potential to be Africa's breadbasket. The sector is crucial to the economy, providing a primary source of income and employment for many Sudanese, especially rural populations. Its forward linkage with the manufacturing sector means it also drives economic growth by supplying industries with raw materials, generating income, fostering trade and creating jobs in related industries such as food processing, transportation and retail. Consequently, in Sudan, there is a strong correlation between agricultural yields and economic performance, with the sector contributing significantly to the country's GDP.

The second powerful scenario to improve incomes and reduce poverty in Sudan is the Governance scenario. In this scenario, Sudan's GDP per capita will rise to US\$2 539 in 2043, representing a 6.5% (US\$155) increase over the Current Path for that year. The Governance scenario will also lift 4.8 million additional people out of extreme poverty, compared to the Current Path forecast.

Chart 34: GDP per capita in the Current Path and scenarios, 2020-2043

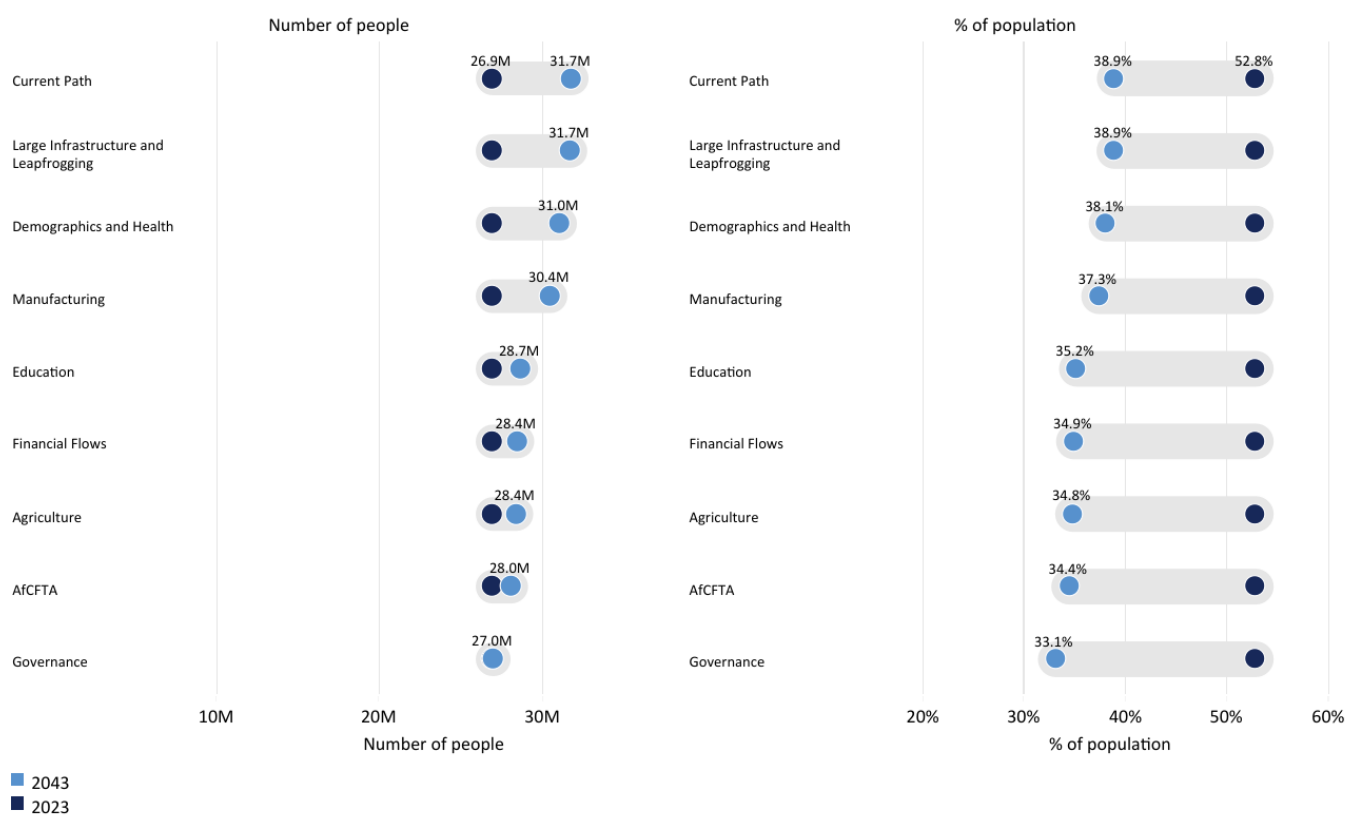


Source: IFs 8.38 initialising from IMF data

Good governance in the form of adherence to the rule of law, reduced corruption and improved transparency and accountability can undoubtedly inspire investor confidence in the economy and attract more FDI into Sudan, which can lead to more rapid economic growth. Also, strong governance systems ensure that public resources are utilised efficiently to address people's needs rather than being diverted into individual pockets, thereby significantly impacting poverty reduction.

Another important scenario for raising living standards and reducing poverty is the AfCFTA. In the AfCFTA scenario, Sudan's GDP per capita will increase to US\$2 535 by 2043, representing an increase of US\$151 or 6.3% over the Current Path. Additionally, in this scenario, 3.7 million fewer people will be living in extreme poverty compared to the Current Path. A regional free trade area such as the AfCFTA increases trade openness, accelerating technology diffusion and thereby improving productivity and innovation activities. This ultimately leads to welfare gains as resources flow to their most productive uses and lower consumer prices. It could also increase Sudan's exports by providing access to a much larger market and by improving the country's manufacturing sector through competition.

Chart 35: Poverty in the Current Path and scenarios, 2023-2043



Source: IFs 8.38 initialising from UNPD population prospects estimate, WDI and PovcalNet data

The Financial Flows scenario also has a strong impact on improving average incomes and reducing extreme poverty in Sudan. By 2043, the scenario will raise GDP per capita to US\$2 492, which is US\$108 above the Current Path projections. The scenario could also push an additional 3.3 million Sudanese out of extreme poverty. This suggests that external financial flows, particularly aid, remain a crucial source of funding to improve average incomes in Sudan and, therefore, an abrupt end of aid to the country will be detrimental to its economic recovery prospects, at least in the medium term. The country should aim to attract more FDI in the long term, once the conflict ceases, as this is a more sustainable means of funding development priorities.

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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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